

Introduction/Overview

Microsoft Dynamics 365 NDIS API

“Put your cashflow on auto-pilot”

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Your Dynamics 365 Project Partner

Introduction, Dynamics 365 NDIS API Integration

NDIS API integration lets you invoice and claim direct to NDIA, manage errors, and update participant information all in real time without having to log into PRODA or use a single spreadsheet.

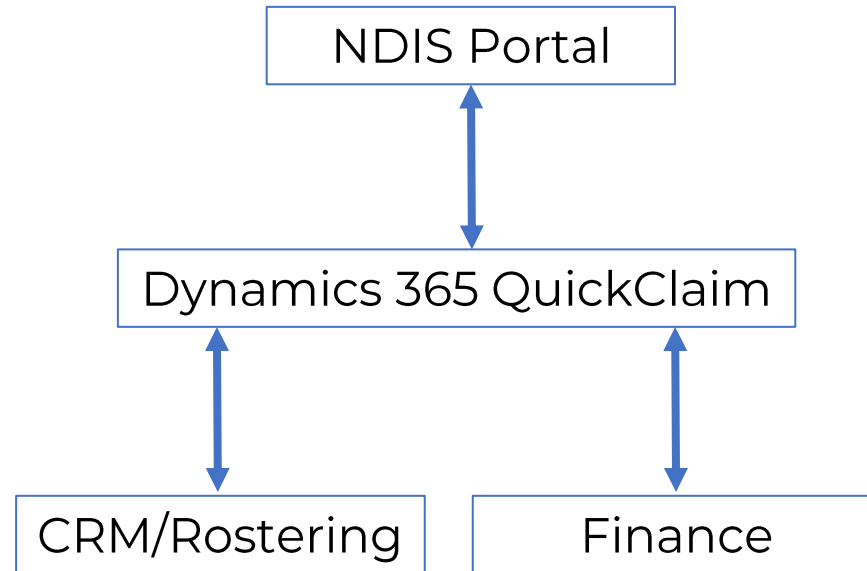
- ▶ Industry best practice to ensure that your data is safe
- ▶ Secure and stored in Australia
- ▶ Service is ISO 27001 aligned via NDIS Digital Partner aggregator

APIs Available

- ▶ Service Booking
- ▶ Notification
- ▶ Budget
- ▶ Interactions (upload file)
- ▶ Quotations
- ▶ Reference Data (price book)
- ▶ Payment Request
- ▶ Enhanced API
- ▶ Analytics
- ▶ (Tableau/Power BI DS)

Enterprise Level Features

- ▶ Client Participant Management
- ▶ Service Bookings
- ▶ Invoicing
- ▶ Specialised Set Up
- ▶ Claim Management
- ▶ Custom Integrations
- ▶ Consultation & Training



▶ There is no need to set up new systems, move your data or retrain your staff, which keeps your data safe and secure.

Print Screens

Dynamics 365 | AP Management Hub

Search

SANDBOX Try the new look

Refresh Service Bookin...

Account · Participant - NDIS API

Summary Details Membership Assessments Disabilities Goals Quotes Agreements Service Bookings NDIS Notifications Supports Bookings Progress Note Incidents Invoices Medical Cleara

ACCOUNT INFORMATION

Account Number	108121
Client Name	[Redacted]
First Name	[Redacted]
Last Name	[Redacted]
Salutation	Mrs
Account Type	Person with a disability (PWD), Client
Type	---
Date of Birth	20/01/1953
Main Phone	---
Fax	---

Timeline

Search timeline

Enter a note...

Recent

- Auto-post on Case Marked as Cancelled while bulk ... 20/07/2022, 3:53 AM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 19/07/2022, 4:30 PM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 19/07/2022, 4:01 PM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 19/07/2022, 11:22 AM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 18/07/2022, 2:40 PM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 18/07/2022, 2:35 PM
Case closed by Gurpreet Singh for Account Gwenyth Foord
- Auto-post on Case Marked as Cancelled while bulk ... 17/07/2022, 10:41 PM
Case closed by Gurpreet Singh for Account Gwenyth Foord

Currently Working	---
Attending School	---
Funding Source	NDIS
NDIS Participant	Yes
NDIS Registered	Yes
NDIS ID	430293070
Do You Have a Plan?	No
NDIS Plan Start Date	

Service Booking Budgets

Dynamics 365 | Support Coordination | Search | SANDBOX Try the new look

PH Pamela Hall - Saved | Account · Supported Coordination Participant - API | BU _ NeuroMoves Owner

Summary Details Disabilities Goals Quotes Agreements Progress Note Incidents Invoices **Service Booking** NDIS Notifications Files Related

Service Booking Budget

+ New Service Booking ... Add Existing Service B... Refresh

Client	Bookin...	Support Category	Support Item	Service Date Fr...	Service Date To	Alloc...	Remaini...	Accrued	Status	Last Up...	Name
Pamela Hall	50863570	Daily Activities		12/09/2023	11/09/2025	\$129,182...	\$127,940...	\$1,242.00	Active		Pamela Hall430444956
Pamela Hall	50863570	Social Community Civic		12/09/2023	11/09/2025	\$12,570.24	\$12,570.24	\$0.00	Active		Pamela Hall430444956
Pamela Hall	50863570	Support Coordination	Support Coordination Level :	12/09/2023	11/09/2025	\$8,011.20	\$6,784.47	\$1,226.73	Active		Pamela Hall430444956
Pamela Hall	50863570	CB Daily Activity		12/09/2023	11/09/2025	\$7,759.60	\$7,759.60	\$0.00	Active		Pamela Hall430444956
Pamela Hall	50863570	Consumables		12/09/2023	11/09/2025	\$6,055.70	\$3,905.55	\$2,150.15	Active		Pamela Hall430444956
Pamela Hall	50863570	CB Choice Control	Plan Management - Monthly	12/09/2023	11/09/2025	\$2,506.80	\$1,880.10	\$626.70	Active		Pamela Hall430444956
Pamela Hall	50863570	CB Choice Control	Plan Management - Set Up C	12/09/2023	11/09/2025	\$232.35	\$0.00	\$232.35	Active		Pamela Hall430444956

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Service Booking Budgets

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Show Chart | + New | Delete | Refresh | Visualize this view | Email a Link | Flow | Run Report | Excel Templates | Export to Excel | Import from Excel | Share

Active Service Booking Budgets

Edit columns | Edit filters | Filter by keyword

Client	Bookin...	Support Category	Support Item	Service Date Fr...	Service Date To	Alloc...	Remaini...	Accrued	Status	Last Up...	Name	Created O
...	...	Daily Activities		17/11/2022	16/11/2024	\$999,999....	\$490,353....	\$509,646....	Active		...	7/03/20
...	...	Daily Activities		12/04/2022	11/04/2024	\$999,999....	\$48,492.57	\$951,507....	Active		...	7/03/20
...	...	Daily Activities		5/01/2023	4/01/2025	\$969,864....	\$403,788....	\$566,075....	Active		...	7/03/20
...	...	Daily Activities		23/12/2022	22/12/2024	\$809,365....	\$304,183....	\$505,181....	Active		...	7/03/20
...	...	Daily Activities		30/08/2023	29/08/2024	\$724,274....	\$484,925....	\$239,349....	Active		...	7/03/20
...	...	Daily Activities		26/04/2022	25/04/2024	\$721,892....	\$13,251.69	\$708,640....	Active		...	7/03/20
...	...	Daily Activities		18/11/2022	17/12/2023	\$674,322....	\$468,380....	\$205,941....	Active		...	7/03/20
...	...	Daily Activities		16/02/2024	16/02/2026	\$667,680....	\$656,816....	\$10,864.00	Active		...	7/03/20
...	...	Daily Activities		27/01/2023	26/01/2025	\$603,199....	\$305,308....	\$297,890....	Active		...	7/03/20
...	...	Daily Activities		24/03/2023	23/03/2024	\$594,113....	\$176,628....	\$417,485....	Active		...	7/03/20

Plan Management Budgets

Dynamics 365 AP Management Hub

Search

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GF **Gwenyth Foord** - Saved
Account · Participant - NDIS API

Alerts Summary Details Membership Assessments Disabilities Goals Quotes Agreements **Service Bookings** NDIS Notifications Supports Bookings Progress Note Incidents Invoices Medical Clearance ...

Service Booking Budget

Client	Booking ID	Support Category	Support Item	Service ...	Service ...	Allocated	Remaini...	Accrued	Status	Last Up...	Created On	Support...	Name
Gwenyth Foord	50055096	CB Daily Activity		21/02/20...	20/02/20...	\$11,618.20	\$9,601.90	\$2,016.30	Active		7/03/2024 6:4...		Gwenyth Foord
Gwenyth Foord	50055096	Consumables		21/02/20...	20/02/20...	\$4,717.88	\$4,626.08	\$91.80	Active		7/03/2024 6:4...		Gwenyth Foord
Gwenyth Foord	50055096	Daily Activities		21/02/20...	20/02/20...	\$1.00	\$1.00	\$0.00	Active		7/03/2024 6:4...		Gwenyth Foord
Gwenyth Foord	50055096	Social Community Civic		21/02/20...	20/02/20...	\$1.00	\$1.00	\$0.00	Active		7/03/2024 6:4...		Gwenyth Foord
Gwenyth Foord	50055096	CB Choice Control	Plan Management - Set Up Cost:	21/02/20...	20/02/20...	\$232.35	\$0.00	\$232.35	Active		7/03/2024 6:4...	14_033_0...	Gwenyth Foord
Gwenyth Foord	50055096	Transport		21/02/20...	20/02/20...	\$1.00	\$1.00	\$0.00	Active		7/03/2024 6:4...		Gwenyth Foord
Gwenyth Foord	50055096	CB Choice Control	Plan Management - Monthly Fee	21/02/20...	20/02/20...	\$3,655.75	\$1,148.95	\$2,506.80	Active		7/03/2024 6:4...	14_034_0...	Gwenyth Foord
Gwenyth Foord	50055096	CB Health Wellbeing		21/02/20...	20/02/20...	\$5,000.58	\$4,855.13	\$145.45	Active		7/03/2024 6:4...		Gwenyth Foord

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Notifications, Budget Updates

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Home Recent Pinned AP Management PM Invoices PM Invoice Line Items NDIS Claims NDIS Remittances Wise Remittances Activities Service Budget Service Booking Bud... Queues Client Participants Vendors

Alerts Summary Details Membership Assessments Disabilities Goals Quotes Agreements Service Bookings **NDIS Notifications** Supports Bookings Progress Note Incidents Invoices Medical Clearance

NDIS API Notifications + New NDIS Notifications 📄 Add Existing NDIS Not... 🔄 Refresh

Participant NDIS ID	Participant	Event Type	Notification	Created On
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898510 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord	SB BUDGET UPDATED	Participant - Gwenyth Foord Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
430293070	Gwenyth Foord		Remittance for Mrs Gwenyth Foord amount paid \$104.45 on 23/02/2024.	26/02/2024 7:35 AM
430293070	Gwenyth Foord		Participant - Gwenyth Foord Service Booking ID - 59898510 budget updated for Product...	23/02/2024 2:51 PM

Notifications, Remittances

Dynamics 365 Support Coordination Search SANDBOX Try the new look

Save Save & Close New Send survey Open org chart Deactivate Connect Add to Marketing List Dynamics 365 Busines... Assign Delete Refresh Check Access

PH **Pharmacia Health** Saved Account · Supported Coordination Participant - API

Summary Details Disabilities Goals Quotes Agreements Progress Note Incidents Invoices Service Booking **NDIS Notifications** Files Related

NDIS Notifications

+ New NDIS Notifications Add Existing NDIS Not... Refresh

Participant NDIS ID	Participant	Event Type	Notification	Created On
[blurred]	[blurred]	REMIT ADV GENERATED	[blurred] amount paid \$104.45 on 04/03/2024.	6/03/2024 1:04 AM
[blurred]	[blurred]	REMIT ADV GENERATED	[blurred] amount paid \$132 on 29/02/2024.	2/03/2024 5:55 AM
[blurred]	[blurred]		[blurred] amount paid \$39.96 on 23/02/2024.	26/02/2024 7:33 AM
[blurred]	[blurred]		[blurred] amount paid \$40.16 on 23/02/2024.	26/02/2024 7:33 AM
[blurred]	[blurred]		[blurred] amount paid \$168 on 23/02/2024.	26/02/2024 7:33 AM
[blurred]	[blurred]		[blurred] amount paid \$31.96 on 23/02/2024.	26/02/2024 7:33 AM

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Investment

- ▶ Please allow 5 days for base solution implementation and setup.
- ▶ For each participant per month - \$1.00.

- ▶ A current Support Services Agreement is required.

Next steps

1. Schedule project kick-off
2. Global Admin access to be provided
3. Dynamics 365 license setup
4. Solution installation and validation
5. Configurations as required
6. User Acceptance Testing
7. Go-live



Questions and answers

- ▶ What are your questions?
- ▶ What are your concerns?
- ▶ What was not mentioned during this presentation?

For further information, contact:



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Appendices



Dear d365.Global Pty Ltd,

Congratulations! Your organization has attained a Solutions Partner designation in the Microsoft AI Cloud Partner Program. Your organization is one of the first Microsoft partners to attain this designation and I'm excited to celebrate this achievement with you.

I believe in empowering people and driving growth. What that means for you is that we want to empower your organization with the capabilities, resources, and industry depth to best serve customers. And we will invest in your profitability and growth. This is what partnership means to me. So, thank you for your commitment and for the investment you're making in our partnership and in delivering customer success.

The Solutions Partner designation demonstrates your organization's technical capabilities, experience, and ability to deliver successful customer outcomes aligned to the Microsoft Cloud and helps you differentiate your organization with customers.

Your organization d365.Global Pty Ltd has attained:

- Solutions Partner for Business Applications
- Solutions Partner for Modern Work

Best Regards,



Nicole Dezen
Chief Partner Officer and Corporate Vice President, Global Partner Solutions

Microsoft Corporation

This information is current as of August 17, 2023.

CERTIFICATE OF REGISTRATION



THIS IS TO CERTIFY THAT

Datix Pty Ltd

T/A quickclaim

ABN: 32 602 831 890

Level 3, 100 Harris Street Sydney NSW 2075 Australia

CONFORMS TO THE REQUIREMENT OF

INFORMATION SECURITY MANAGEMENT SYSTEM

ISO/IEC 27001:2022

FOR THE FOLLOWING SCOPE

Provision of end-to-end management system for NDIS claims

Statement of Applicability version 14/03/2023

Certificate Number:	877-I-1
Original Certificate Date:	13/04/2023
Certificate Issue Date:	13/04/2023
Certificate Expiry Date:	12/04/2026

Mousa Sharif - Managing Director
Global Compliance Certification Pty Ltd

