Introduction/Overview

Microsoft Dynamics 365 NDIS API

"Put your cashflow on auto-pilot"

Microsoft Solutions Partner
Business Applications

Microsoft Solutions Partner
Modern Work

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PRESENTATION BY

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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

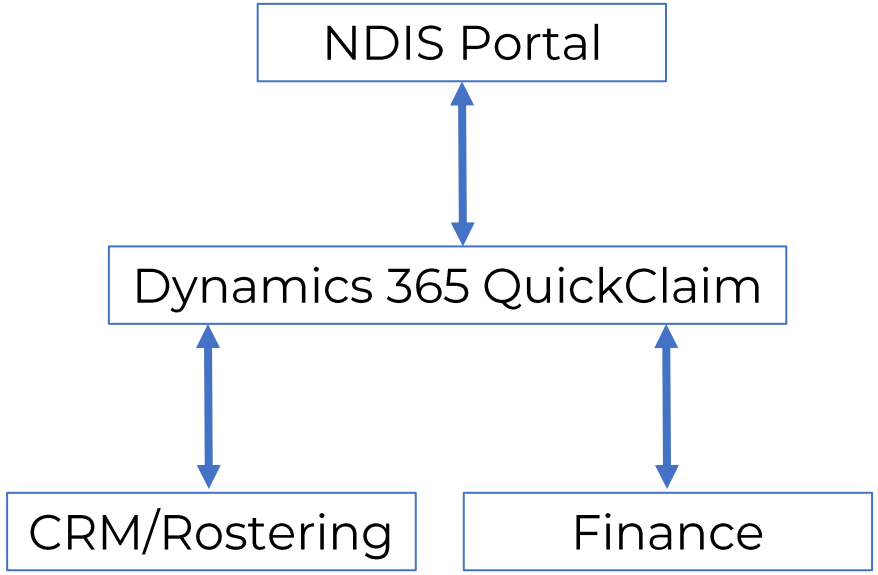
APIs Available

- 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

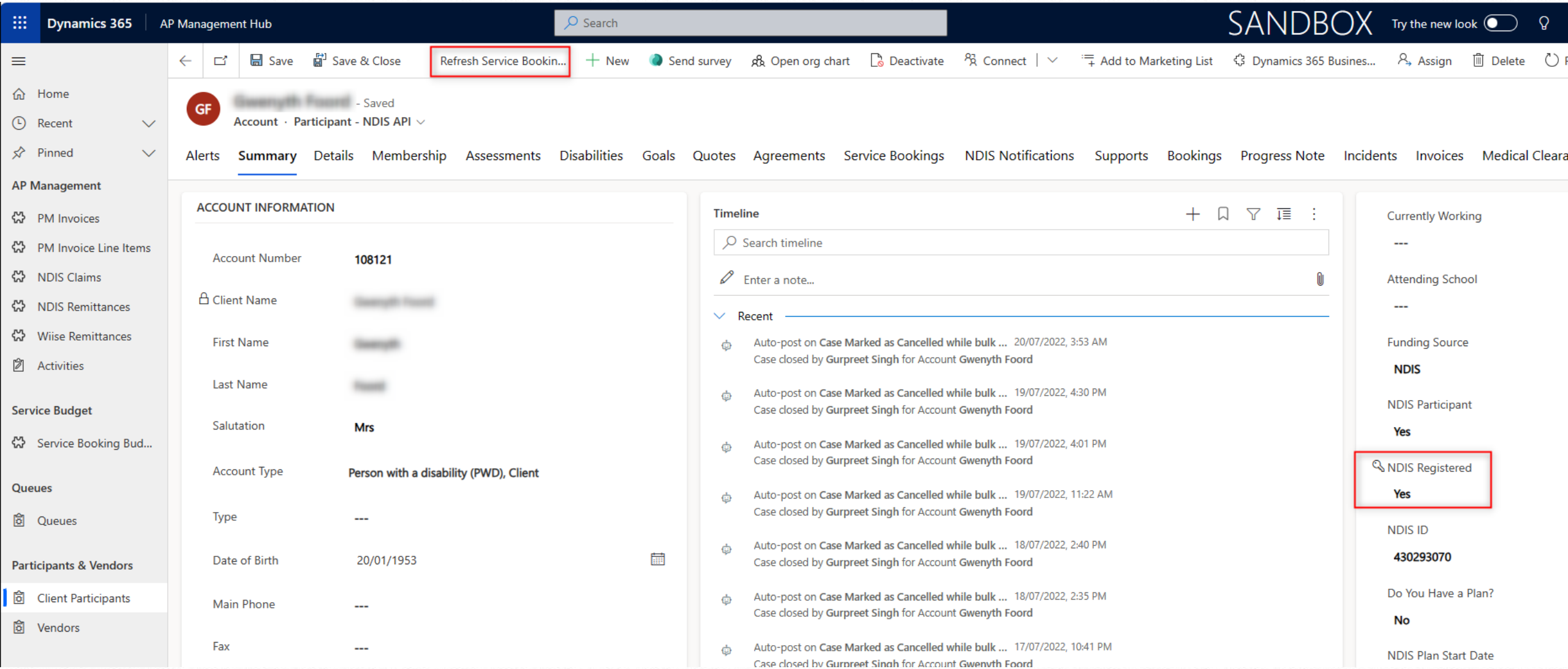
How it Works



- 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

Client Participant



Service Booking Budgets

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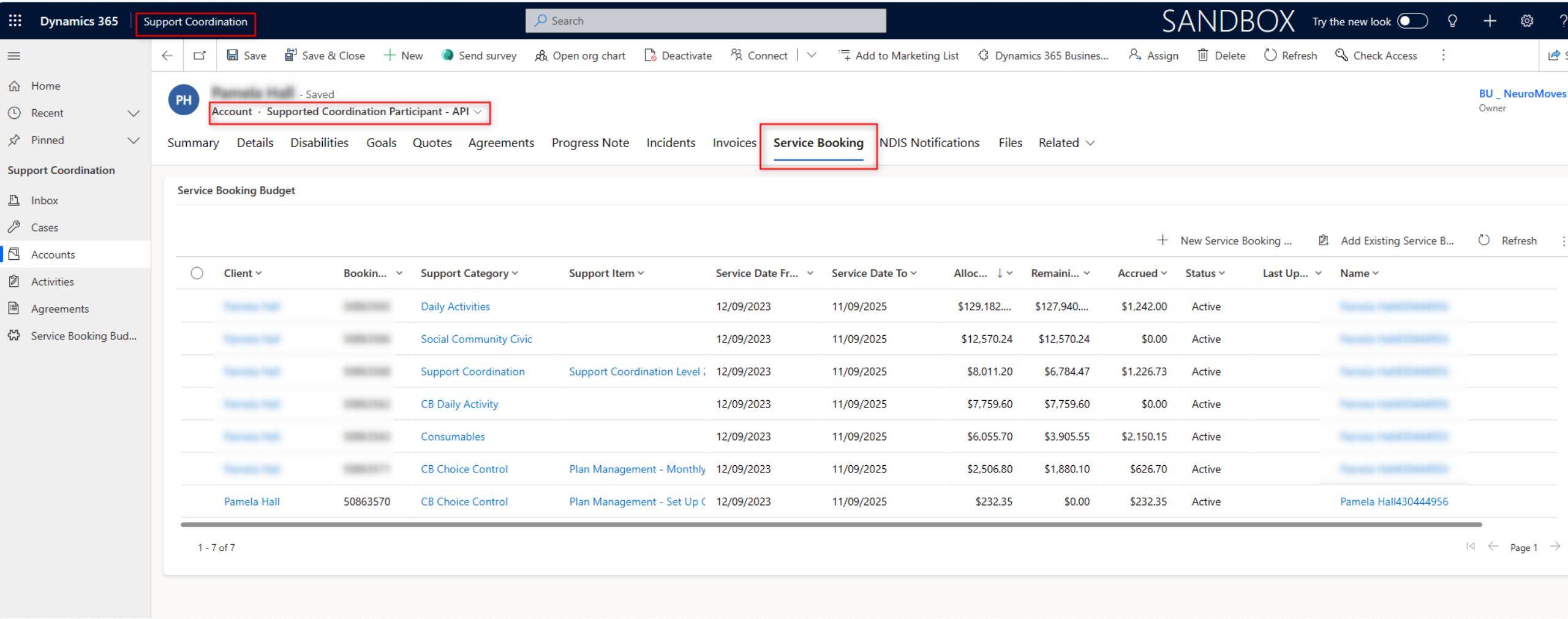
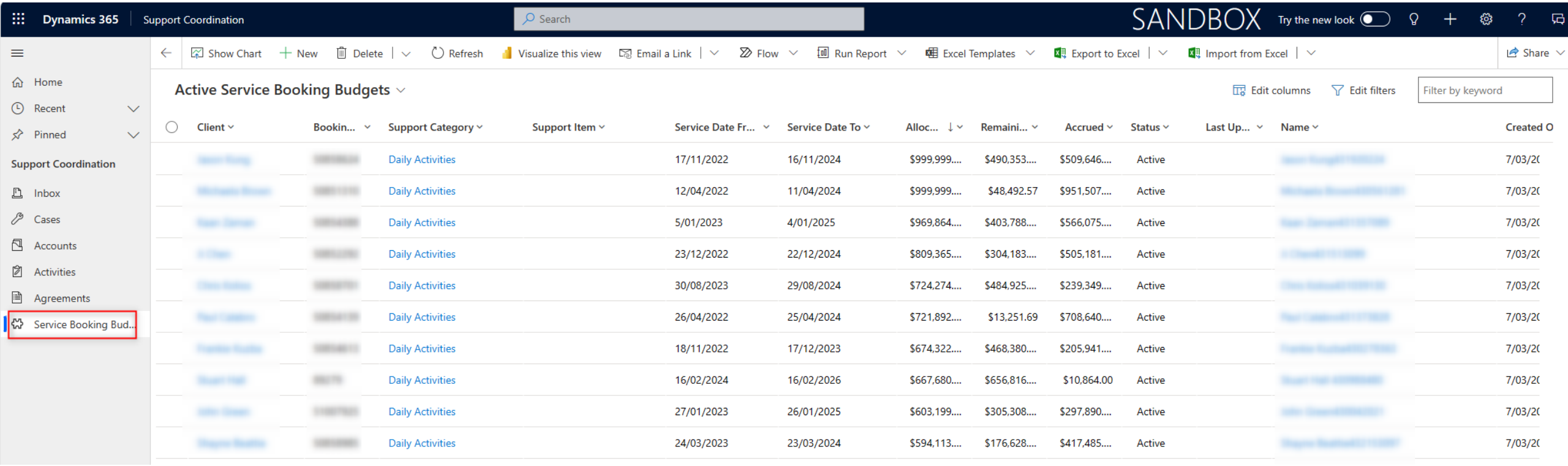
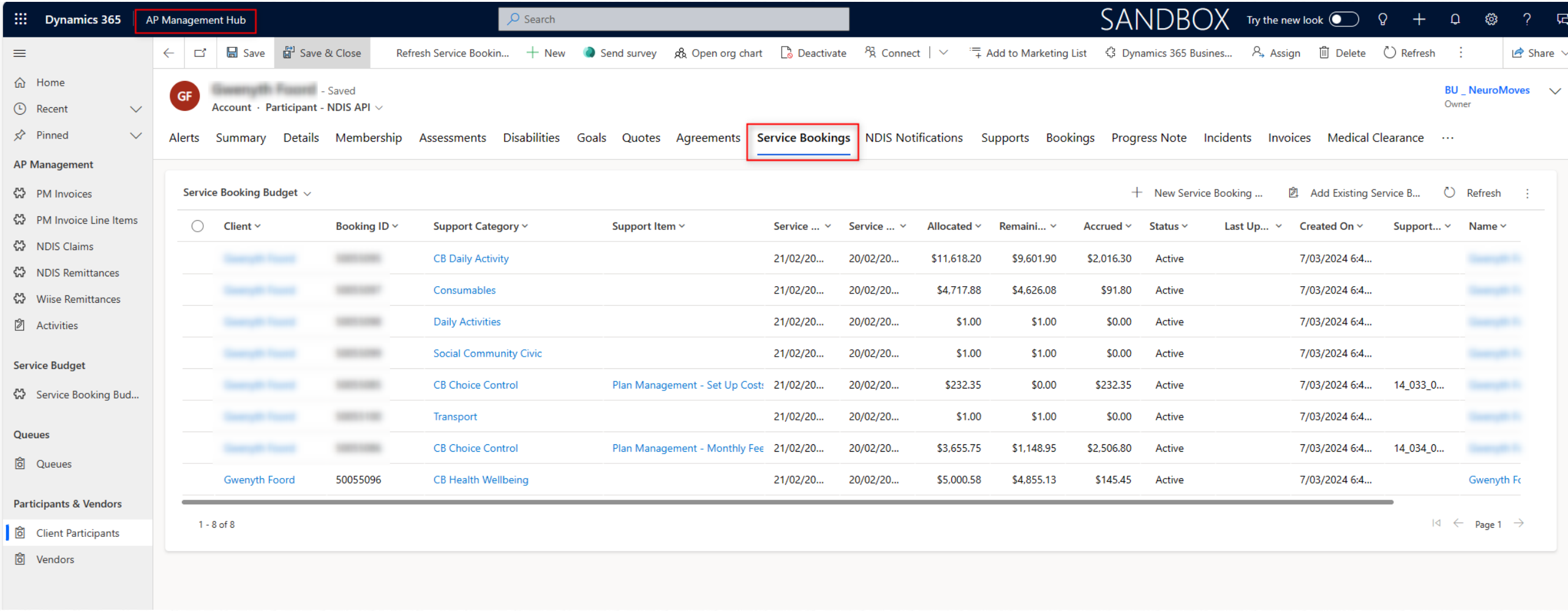


Service Booking Budgets



Client	Bookin...	Support Category	Support Item	Service Date Fr...	Service Date To	Alloc...	Remaini...	Accrued	Status	Last Up...	Name	Created O
[redacted]	[redacted]	Daily Activities		17/11/2022	16/11/2024	$999,999....	$490,353....	$509,646....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		12/04/2022	11/04/2024	$999,999....	$48,492.57	$951,507....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		5/01/2023	4/01/2025	$969,864....	$403,788....	$566,075....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		23/12/2022	22/12/2024	$809,365....	$304,183....	$505,181....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		30/08/2023	29/08/2024	$724,274....	$484,925....	$239,349....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		26/04/2022	25/04/2024	$721,892....	$13,251.69	$708,640....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		18/11/2022	17/12/2023	$674,322....	$468,380....	$205,941....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		16/02/2024	16/02/2026	$667,680....	$656,816....	$10,864.00	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		27/01/2023	26/01/2025	$603,199....	$305,308....	$297,890....	Active		[redacted]	7/03/2(
[redacted]	[redacted]	Daily Activities		24/03/2023	23/03/2024	$594,113....	$176,628....	$417,485....	Active		[redacted]	7/03/2(

Plan Management Budgets



Notifications, Budget Updates

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Dynamics 365 | AP Management Hub | Search | SANDBOX | Try the new look

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

- Home
- Recent
- Pinned

AP Management

- PM Invoices
- PM Invoice Line Items
- NDIS Claims
- NDIS Remittances
- Wiise Remittances
- Activities

Service Budget

- Service Booking Bud...

Queues

- Queues

Participants & Vendors

- Client Participants
- Vendors

GF [redacted] · Saved

Account · Participant - NDIS API

BU _ NeuroMc
Owner

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
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] Service Booking ID - 59898475 budget updated for Product...	6/03/2024 2:25 PM
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] Service Booking ID - 59898510 budget updated for Product...	6/03/2024 2:25 PM
[redacted]	[redacted]	SB BUDGET UPDATED	[redacted] 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

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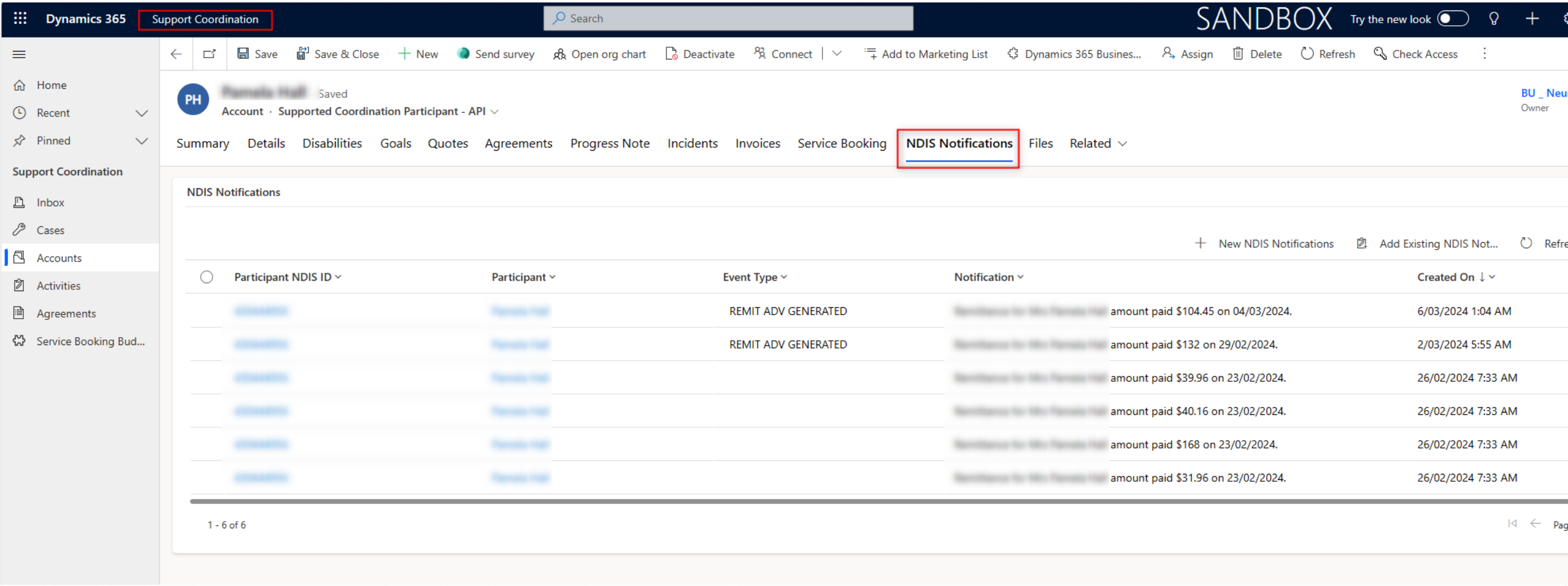

Investment

- 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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+61 409 245 354

Microsoft Solutions Partner
Business Applications

Microsoft Solutions Partner
Modern Work

PRESENTATION BY

d365.Global

Your Dynamics 365 Project Partner

Appendices

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One Microsoft Way
Redmond, WA 98052-6399

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Fax 425 706 7329
www.microsoft.com

Microsoft

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:

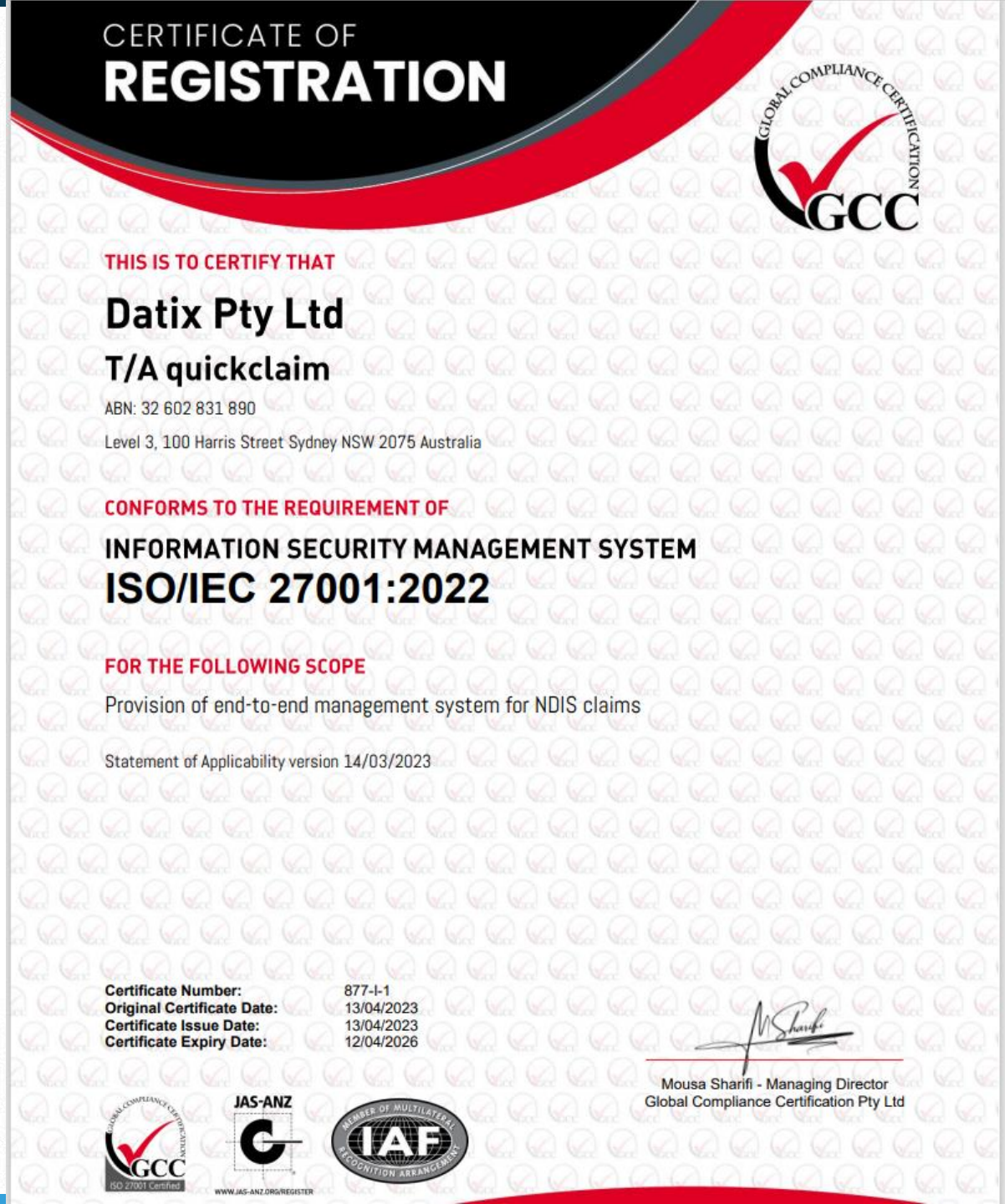
- Solutions Partner for Business Applications
- Solutions Partner for Modern Work

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

GLOBAL COMPLIANCE CERTIFICATION
GCC

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 Sharifi - Managing Director
Global Compliance Certification Pty Ltd

GCC ISO 27001 Certified

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MEMBER OF MULTILATERAL RECOGNITION ARRANGEMENT
IAF