



# data management



**MYP**  
*perform*

# the 4 types of data



clients + providers



staff



financial data



history notes + documents

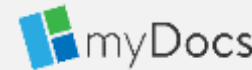
# the 3 ways to manage data

1 data spreadsheet

2 API



























3 manual upload



Most organisations will use a combination of all data management processes for efficiency.

# data integrations

Legend: ● API link ● CSV file

	Timesheets	Invoices	Leave
GENIUS + PocketWatch			
			
			 
			
GENIUS			
			
CIVICA			
			
			
PocketWatch			
			
attaché			
			
			
			



method 1

# data spreadsheet

# benefits

 Builds efficiency

 Clean database

 Quick start

 Real-time information

 Offers transparency

# upload

Initial bulk upload of data from existing databases

- Project duration:** 1 – 2 weeks (allows for data clean + check)
- Content:** Clients, contacts, staff only
- Process:** Subscriber provides CSV file via ticket > MYP reviews + cleans data > Completes a test upload > Reviews data > Makes any adjustments > Uploads subscriber application > Subscriber reviews + confirms correct
- When:** As soon as possible to support training processes

# best practice

Separate data into multiple spreadsheets:

1. Staff [[Staff csv](#)]
2. Participants [[Client + Contact csv](#)]
3. Providers [[Client + Contact csv](#)]
4. Suppliers [[Client + Contact csv](#)]

Note: Recommended that Staff + Participants be integrated first.





# best practice – custom Fields

- Set up custom fields + Relationships (Completed post data management session)
  1. Review fields and ensure all custom fields are created prior to importing data. (ARM > Customisation > Fields)



Custom fields can be created to capture additional fields of data not captured by standard fields.

Custom fields can be configured to be.

- Text fields
- Dropdowns
- Radio buttons (Yes / No)
- Multi Select (Multiple responses)

# best practice – relationships

- Set up key 'Relationships' for client groups. Allows for clear categorisation of client groups. (ARM > Customisation > Relationships)
- Relationships for clients can be set by editing into the client

The screenshot shows the MYP Corporation client dashboard for Northside Physiotherapy. The client name is highlighted with a red box. The dashboard displays key metrics: 1 opportunity, \$0 value, and 0 projects on track. A navigation bar at the bottom includes icons for CONTACTS, PROJECTS, OPPORTUNITIES, DOCUMENTS, HISTORY, LINKS, INVOICES, FORMS, and PROJECTWATCH.

The screenshot shows the MYP Corporation client edit form for Northside Physiotherapy. The form includes fields for Client name, Unique client code, Business number, Web address, and Client Type. A red box highlights the Relationship section, which contains a grid of checkboxes for various relationship types. The 'Health/Fitness' and 'Provider' checkboxes are selected.

Relationship	Propel	Accountant	Adviser	BPHQ	Brokers
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Note: One of the key benefits of setting up layered relationships is the reports and searches pulled from this data. It also allows for seamless control of data and ensures clearly defined lists can be exported instantly.*

# best practice – staff data

- Import Type - Staff CSV
- Required Fields
  - Staff First + Last Name
  - Primary Email Address (Username)
  - Mobile Phone Number
- Recommended Fields:
  - Position Title
  - Primary Role
  - D.O.B
  - Gender
  - Residential address information (Street Address, Suburb, State etc.)

# best practice – participant data

## (Key for Service Providers + Specialists)

- Highly recommended that there is only one participant per client group
- Family contacts (Mother, Father, Siblings, participant representatives only to be added in the same client)
  
- Required Fields: Contact
  - Contact First + Last Name
  - Contact NDIS Number
- Recommended Fields: Contact
  - Custom Fields (Allergies, Primary Disability, etc)
  - Position Title (Participant, Mother, Father, Partner etc.)
  - Contact Email Address 1
  - Contact Phone Number 1
  - Contact Address fields (Street Address, Suburb etc.)

# best practice – participant data

## (Key for Service Providers + Specialists)

- Required Fields: Client
  - Client Name (Name of participant + File / Folder / Group) - e.g. Adam Smith Group
- Recommended Fields: Client
  - Relationship (Client/Customer, Allied Health etc.)
  - Client NDIS Number (Same as participant contact)
  - Client Email (Same as Participant or Key Contact)
  - Client Phone Number (Same as Participant or Key Contact)
  - Client Address information (Street Address, Suburb, State etc.)

# best practice – provider data

## (Key for Plan Managers)

- Import type: Client + Contact csv
- Contacts: Primary Contact from organisation (Staff / Owners / Representatives etc.)
- Recommended Fields: Contact
  - Contact First + Last Name
  - Contact Email Address
  - Contact Mobile Number
  - Position Title
- Client: Organisation
- Required Fields: (All providers must have correct banking information + ABN for NDIA reimbursements)
  - Client Name (Organisation Name)
  - Client Account Name
  - Client Account BSB
  - Client Account Number
  - ABN (Exemption code required if no ABN)

# sample data

client + contact – participant + family member

	F	G	H	M	N	AX	BI	BJ	BK	BN	BO
1	Contact first name	Contact last name	Contact email address 1	Position title	Contact phone 1	Client name	Country	Street address	Suburb	State/Region	Post/Zip code
2	Adrian	Day	adrian@care.com	Participant	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545
3	Peter	Day	peter@care.com	Father	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545

The screenshot shows a software interface with a search bar and a navigation menu. The main content area is divided into two sections: 'CLIENT' and 'CONTACTS (2)'. The 'CLIENT' section displays details for 'Adrian Day Group', including contact information and a summary of opportunities. The 'CONTACTS' section displays a table of contacts, with 'DAY Adrian' and 'DAY Peter' highlighted in a red box. The 'OPPORTUNITIES (3)' section is also visible below the contacts.

NAME	POSITION TITLE	Actions
DAY Adrian	Participant	[Icons]
DAY Peter	Father	[Icons]

OPPORTUNITY	OWNER	CONTACT	Actions
Accommodation	FC	DAY Adrian	[Icons]
Day program	FC	DAY Adrian	[Icons]
Referral for service B	HC	DAY Peter	[Icons]

# sample data

## client + contact – provider/supplier

	G	H	I	N	O	AY	AZ	BA	BB	BC	BD	BE
1	Contact first name	Contact last name	Contact email address 1	Position title	Contact phone 1	Client name	Country	Street address	Suburb	Street address 2	Town/City	State/Region
2	John	Smith	jsmith@ssphysio.com.au	Physiotherapist	07 6666 9901	Southside Physiotherapy	Australia	15 Regen St	BRISBANE		BRISBANE	QLD
3	Mary	Brown	mbrown@ssphysio.com.au	Physiotherapist	07 6666 9902	Southside Physiotherapy	Australia	15 Regen St	BRISBANE		BRISBANE	QLD

The screenshot shows a software interface with a dark header containing a search bar and navigation icons. Below the header, there are several tabs and a main content area. The main content area is divided into two sections: 'CLIENT' and 'CONTACTS (2)'. The 'CLIENT' section shows details for 'Southside Physiotherapy', including its address and a summary of opportunities and projects. The 'CONTACTS (2)' section shows a list of contacts with their names and positions. A red box highlights the contact list, and a yellow box highlights the client details. Arrows from the table above point to these elements in the interface.

NAME	POSITION TITLE	
BROWN Mary	Physiotherapist	[Icons]
SMITH John	Physiotherapist	[Icons]



# fields

- The following fields are required as a minimum to perform an import:
- Contact first name or Contact last name
- Client name
  
- The following fields are recommended when performing an import:
- Contact first name
- Contact last name
- Contact email address 1
- Contact phone 1
- Contact address fields
- Position title
- Client name
- Client address fields

# what does bad data look like?

Adrian Day is a participant. He has a father and a GP.



	F	G	H	M	N	AX	BI	BJ	BK	BN	BO
1	Contact first name	Contact last name	Contact email address 1	Position title	Contact phone 1	Client name	Country	Street address	Suburb	State/Region	Post/Zip code
2	Adrian	Day	<a href="mailto:adrian@care.com">adrian@care.com</a>	Participant	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545
3	Peter	Day	<a href="mailto:peter@care.com">peter@care.com</a>	Father	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545
4	John	Citizen	<a href="mailto:j.citizen@gpmedical.com">j.citizen@gpmedical.com</a>	GP	07 5512 3456	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545



	F	G	H	M	N	AX	BI	BJ	BK	BN	BO
1	Contact first name	Contact last name	Contact email address 1	Position title	Contact phone 1	Client name	Country	Street address	Suburb	State/Region	Post/Zip code
2	Adrian	Day	<a href="mailto:adrian@care.com">adrian@care.com</a>	Participant	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545
3	Peter	Day	<a href="mailto:peter@care.com">peter@care.com</a>	Father	07 5543 6782	Adrian Day Group	Australia	865 Citizen Street	Samplesville	QLD	4545

	F	G	H	M	N	AX	BI	BJ	BK	BN	BO
1	Contact first name	Contact last name	Contact email address 1	Position title	Contact phone 1	Client name	Country	Street address	Suburb	State/Region	Post/Zip
2	John	Citizen	<a href="mailto:j.citizen@gpmedical.com">j.citizen@gpmedical.com</a>	GP	07 5512 3456	Citizen Medical Practice	Australia	65 Brown Street	Medicalville	QLD	



method 2

API

# what is an API?

API application programming interface

An API allows computer programs to talk to one another

**Push:** Sends data from MYP to another program

**Pull:** Brings data from another program to MYP

**Push + pull:** Data moves back and forth between the two

\* can be an automated process and/or manual process

# benefits



One source of truth



Builds efficiency



Real-time information



Data synchronisation\*



Offers transparency



Eliminates double entries



Quick start

# MYP API mappings

Software	Contacts		Organisations		Staff		Payroll (94six)		Leave (94six)		Invoicing (GENIUS/ARM)		Timesheets (PocketWatch)	
	Push	Pull	Push	Pull	Push	Pull	Push	Pull	Push	Pull	Push	Pull	Push	Pull
Xero	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	
MYOB AccountRight Live	✓	✓	✓	✓	✓	✓	✓	✓			GENIUS ONLY		✓	

# Xero + MYOB AR Live

Automate: A daily transfer of all data to MYP or from MYP

Project duration: 2-3 weeks (allows for data clean + check)

Process:

When:

# source of truth

When integrating a third-party API (MYOB or Xero) with MYP, it is crucial to establish the point of truth

The source of truth by definition is the point of all data entry for an organisation – you can have different sources of truth for contacts and employees.

MYP is treated as the source of truth for all GENIUS invoices, plan managed claims and PocketWatch timesheets.

Based on your requirements, the source of truth may differ.

NB: The source of truth dictates where data is entered and will overwrite data in the receiving system every time.



# client + contact data scenarios

Scenario	Solution
Data is stored in physical or digital documents, no data is available in Xero/MYOB	Import to MYP via CSV, set MYP as source of truth via API Settings > Structure –sync to third party API
All data is stored entirely in Xero/MYOB	Import data from third party API once, set MYP as source of truth via API Settings > Structure – sync to third party API
Data is partially stored in Xero/MYOB, partially in physical or digital documents	Import data partially stored in third party API once, export all data from MYP as CSV, complete export CSV with remaining data, import combined CSV to MYP, set MYP as source of truth via API Settings > Structure – sync to third party API Outcome: No duplicates will be created but data previously stored outside of the system has been created
Data is partially in MYP, partially in Xero/MYOB	Create a back-up for the third party API, export data from MYP to third party API – identify any duplicates created: A) Merge duplicates in Xero/MYOB, selecting the duplicate from MYP as primary source of data OR B) Amend duplicate records to match existing records in third party, revert third party API to last backup and trigger another export
All data is stored in MYP	Set MYP to export as the source of truth via API Settings > Structure – Data will sync to third party API as it is created

# recommendation

## clients + contacts

- For clients + contacts (Participants, plan managers, support coordinators, service providers etc.)
- The recommended source of truth is MYP
  - This enables employees to enter data in MYP, which will automatically push to the third-party API (MYOB or Xero)
  - Majority of employees will generally have access to MYP but may not have access to the third-party API (MYOB or Xero)

# recommendation

## staff

- For staff the recommended source of truth is the third-party API
- As third-party APIs (MYOB or Xero) are used for processing payroll, these commonly contain more payroll information which is not captured in MYP ie Bank account details
  - As access to the third-party API is generally restricted to payroll administration, this gives more control over employees being set-up in MYP only when their payroll information is complete

# recommendation

## invoices

Prior to going live:

1. Map your inventory + staff links between MYP – MYOB via ARM Pro > Administration > API Settings
2. Reconcile at least one actual invoice in GENIUS – This can be done using the csv remittance payee advice provided by the NDIA
3. (Recommended) Backup your third party API data prior to your initial data push
4. Push your existing clients + contacts to your third-party API to establish invoice links to relevant contact records
  - a. (Optional) Lodge a Data Integration ticket with MYP for a meeting prior to triggering any form of Import/Export on API settings. We review your mapped items + source of truth, ensuring everything is correct prior to the initial sync

# links – import employees from MYP to Xero

All clients + contacts must exist in both MYP and your third-party API (MYOB or Xero) prior to going live, as these are used for the invoices syncing between the two systems.

	Import from	Export to	
Contacts	-- Select account --	MYP Xero	↔
Employees	MYP Xero	-- Select account --	↔
Payroll	-- Select account --	-- Select account --	↔
Leave	-- Select account --	-- Select account --	↔
Timesheet	-- Select account --	-- Select account --	↔

# how to manage invoice data



# MYP API mappings

Software	Accounts	
	Push	Pull
Xero		✓
MYOB		✓



# before you start

- Clients and contacts can only be archived not deleted
- Deletion of data requires an MYP engineer (costly + time consuming)
- Make sure your data is clean before pressing START
- Sync will override

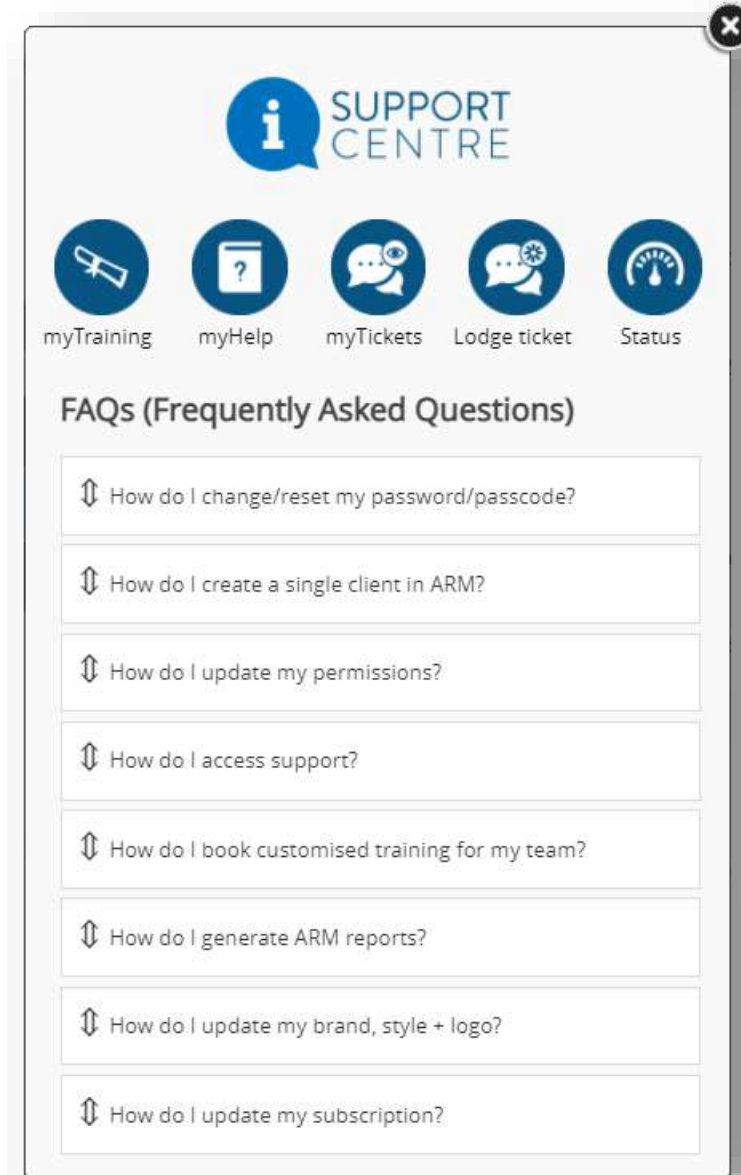


# common problems + FAQs

- Why didn't my data sync?
- I received an error notification, what does it mean?
- Why do I have duplicate clients?
- Why do I have duplicate staff?
- Why has my data been overridden?
- How does MYP know the payrates?

# support centre

- Access myTraining + myHelp
- Lodge, view + update support tickets
- View frequently asked questions



The screenshot displays the 'SUPPORT CENTRE' interface. At the top, there is a logo with an 'i' in a blue circle and the text 'SUPPORT CENTRE'. Below the logo are five circular icons: a magnifying glass (myTraining), a question mark (myHelp), two speech bubbles (myTickets), a speech bubble with a gear (Lodge ticket), and a circular arrow (Status). Below these icons is a section titled 'FAQs (Frequently Asked Questions)' containing a list of eight questions, each with a double-headed arrow icon on the left:

- How do I change/reset my password/passcode?
- How do I create a single client in ARM?
- How do I update my permissions?
- How do I access support?
- How do I book customised training for my team?
- How do I generate ARM reports?
- How do I update my brand, style + logo?
- How do I update my subscription?

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