



certified training
(plan management)



GENIUS

automate + streamline your NDIS management processes



Streamline your client engagement process with automation of agreements



Fast track invoices + claims with other GENIUS users



Keep clients, families + stakeholders informed on budgets, spending + other key information via the client dashboard/portal



Easy invoice/claim management with integrated NDIS price lists



Staff can use GENIUS anywhere, anytime via computer, table or phone



Seamlessly integrate your NDIS client engagement with the MYP CRM + rostering modules as well as cloud accounting software (Xero + MYOB)

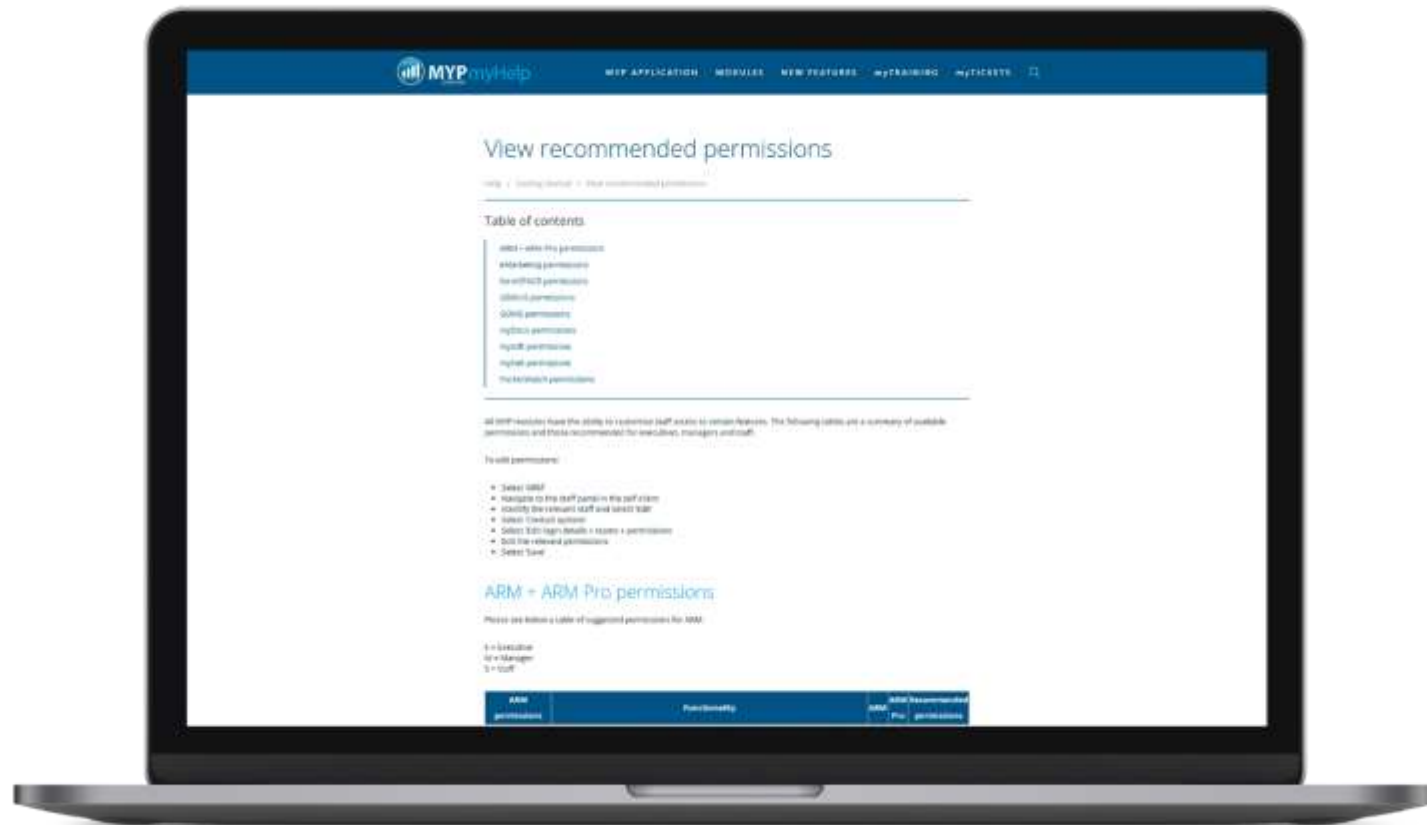
what you will learn – plan managers

- Overview of GENIUS features
- Administer settings
- Manage client engagement + information, including representative + other service providers
- Integrate with NDIS price lists + administer invoices + claims to NDIA
- Manage supports + service bookings
- Send, track + renew agreements
- Send log in for client dashboard/portal
- Generate reports

recommended permissions

It is extremely important that staff permissions are assigned correctly.

<https://help.mypcorp.com/art/recommended-permissions/>



workflow - plan managers

- Create + finalise client engagement + SA + SOS
- Create recurring invoices for PM fees
- Enter service bookings
- Upload invoices received
- Create claims from invoices
- Approve invoices + auto generated invoices
- Generate report + upload to portal
- Download remittance
- Upload remittance to reconcile
- Sync reconciled to XERO/MYOB
- Update claimed + gap invoices

next steps

- Update your price books
- Complete your service agreement template
- Enter client engagements in GENIUS
- Enter invoices + claims
- Upload your bulk upload file to NDIA + receive remittance
- Prepare any questions for tailored training or Q + A sessions

learn to use your systems, your way

delivery styles to suit your needs

MYP Training

online group training

MYP Training sessions are run on a regular basis. These online sessions are scheduled regularly and you are welcome to attend as many times as you like. These are a great way to refresh your skills.

Want to attend?

Check out all the details of upcoming MYP Training sessions + book your place via the calendar on your MYP home page.

MYP Tailored Training

custom onsite or online sessions

MYP Tailored Training sessions are available if you require a session specifically for your organisation. These sessions are custom-designed by our trainers and can be run onsite or online for a fee.

Want to know more?

Simply log in to MYP + submit a booking enquiry via the 'Subscription + Training Management' area.

covering everything you need to know

MYP Training, 24/7 myTraining and Tailored Training sessions cover two types of content to ensure you are getting the most from MYP.



'Certified' sessions cover specific modules and, upon completion, attendees gain access to Level 2 Support.



'Professional Development' sessions are designed to further develop skills in specialist areas.

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