

wiise

Capability guide for NDIS providers

The only ERP integrated
with the NDIA



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“We now have really robust reporting. We can generate reports with one click and drill down on the data.”

Annie Doyle GAICD, CEO at Civic



What is Wiise?

Wiise is a modern ERP system built on Microsoft's global Business Central platform and designed specifically for Australian and New Zealand businesses. Developed in partnership with KPMG and Microsoft, Wiise brings together accounting, operations, inventory, payroll and reporting into one platform. It helps growing businesses, streamline processes, gain real-time insights and make smarter, and faster decisions to accelerate their growth.



Powered by



Securely managed



Trusted by 350+ Australian and New Zealand Businesses



Why Wiise?

Built on Microsoft's global Business Central platform, Wiise delivers the local functionality, integrations, partner expertise, and support needed to run and scale with confidence.

wiise	<p>Hand-picked Implementation Partners</p>	<p>Local Support Team</p>	<p>Validated Integrations</p>	<p>Flexible Billing Arrangements</p>
	<p>Operational Essentials Built-in</p>	<ul style="list-style-type: none"> ✓ Payroll ✓ Bank Feeds 	<ul style="list-style-type: none"> ✓ ePayments ✓ Reporting 	<ul style="list-style-type: none"> ✓ KPMG Chart of Accounts ✓ Landed Costs
	<p>Microsoft Dynamics 365 Business Central</p>	<ul style="list-style-type: none"> ✓ Finances ✓ Inventory 	<ul style="list-style-type: none"> ✓ Sales & Service ✓ Jobs & Projects 	<ul style="list-style-type: none"> ✓ Reporting ✓ Supply Chain



Your organisation is growing, but your systems aren't keeping up

- ✘ **Manual NDIS claims and payment reconciliation** drain staff time and delays cash flow.
- ✘ **Hard to see program and service financials**, leading to over-servicing, unpaid invoices, and margin erosion.
- ✘ **Fragmented NDIS funding visibility** makes it hard to track budgets, risking overspend and clawbacks.
- ✘ **Board and NDIA reporting** is slow, stressful, and error-prone, risking compliance breaches.
- ✘ **Growth adds complexity**, with manual processes adding overhead and pulling your team away from participant outcomes.

Most NDIS Providers are juggling too many disconnected systems:

Care Provision	MYP, Nightingale, Shiftcare, Dynamics 365, Other
Accounting	Xero, MYOB, Attache, Sage, Quickbooks
Payroll	ADP, Micropay, Caremaster, and many more
HR	Elmo, Bamboo, Worknice, Vertex, and many more
CRM	Sugar, Hubspot, Excel, Salesforce
Inventory	Excel, Reckon, CIN7
SCHADS Award Interpretation	Many
Rental	Baseplan
Accounts Receivable	Many
Expenses	Many

How Wiise's advanced financial management helps NDIS providers

Automate NDIS claims, payments, and funding, and get real-time financial clarity in one system, built for growth.

- ✓ Get paid faster with automated claims and reconciliations
- ✓ Track funding and see financial and service performance in real time
- ✓ Reduce admin overhead so your team can focus on participants
- ✓ Integrated rostering, payroll, and financial management
- ✓ Scale confidently while staying compliant





NDIS features & capabilities

NDIS features and capabilities



Additional
NDIS Fields



Wiise direct integration
with NDIA APIs



NDIS
Invoicing



NDIS Chart
of accounts



Onboarding and Setup
(PRODA Setup)



Remittance
matching



NDIS Product
Catalogue integration



Care Management
integration fields



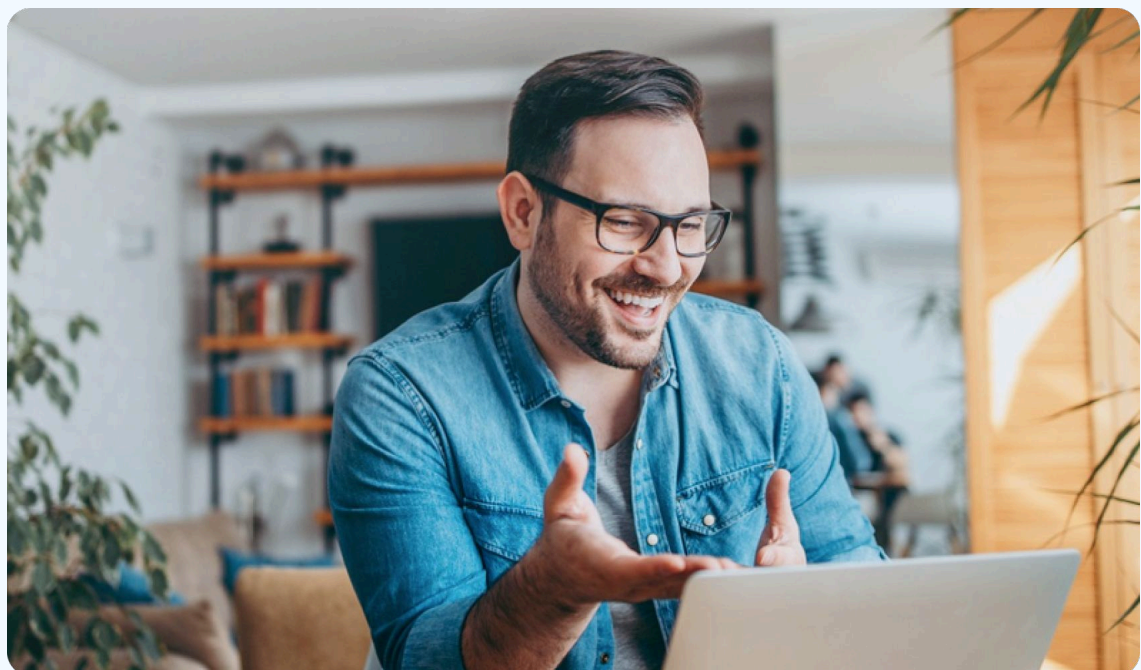
Bulk Payment
Requests



Credit notes &
resubmissions

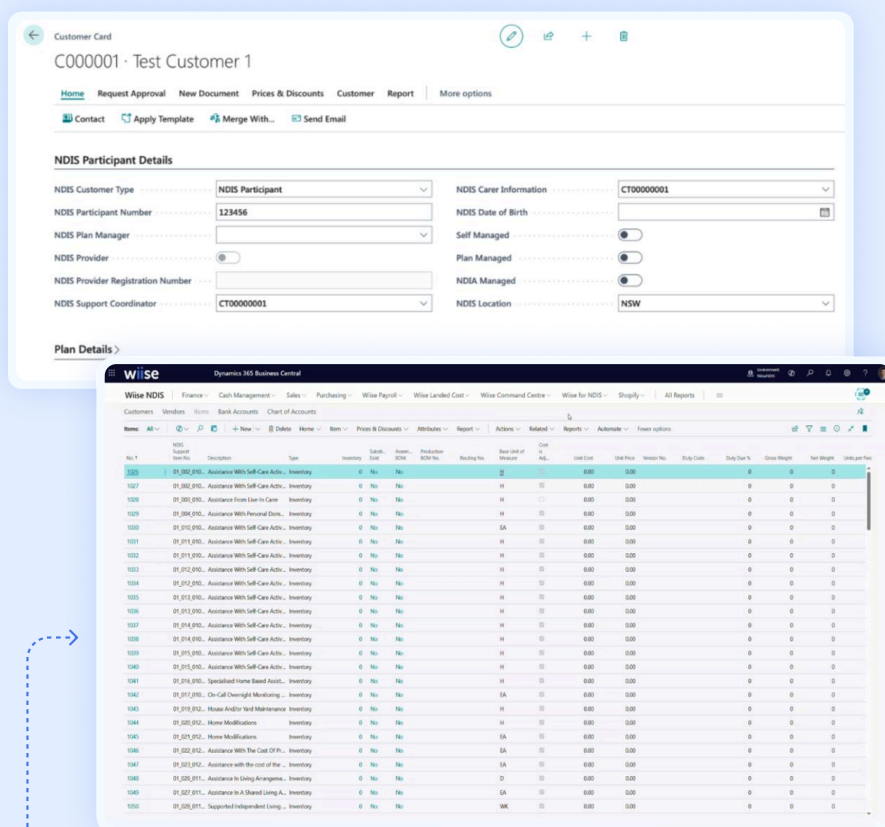


NDIS dashboards



Get paid faster with fewer errors

- ✔ **NDIA API integration**
Submit claims (including bulk claims) directly from Wiise, eliminating manual uploads and preventing errors
- ✔ **Automated Remittance Retrieval**
Automatically fetch payment remittances from NDIA
- ✔ **Auto-Reconciliation**
Automatically match claims to payments, reducing manual checks
- ✔ **NDIS Catalogue Integration**
Easily apply the correct support codes and rates, reducing claim rejections

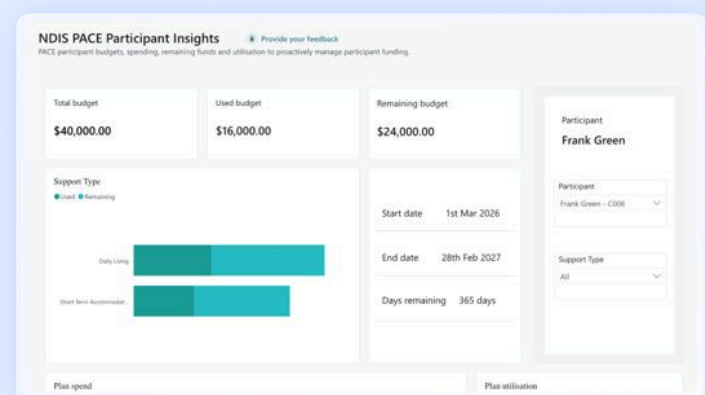
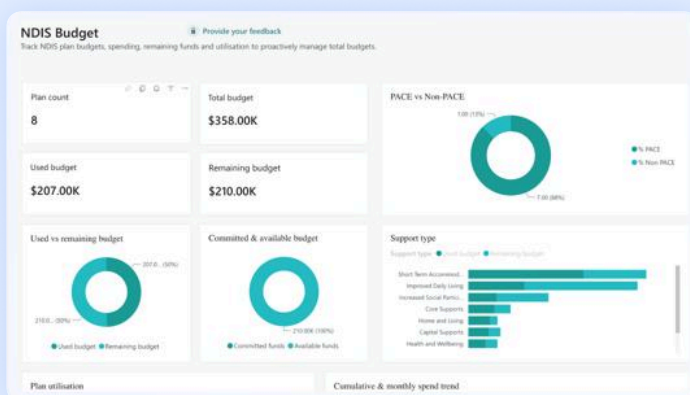


Automatically updated pricing

State and region pricing

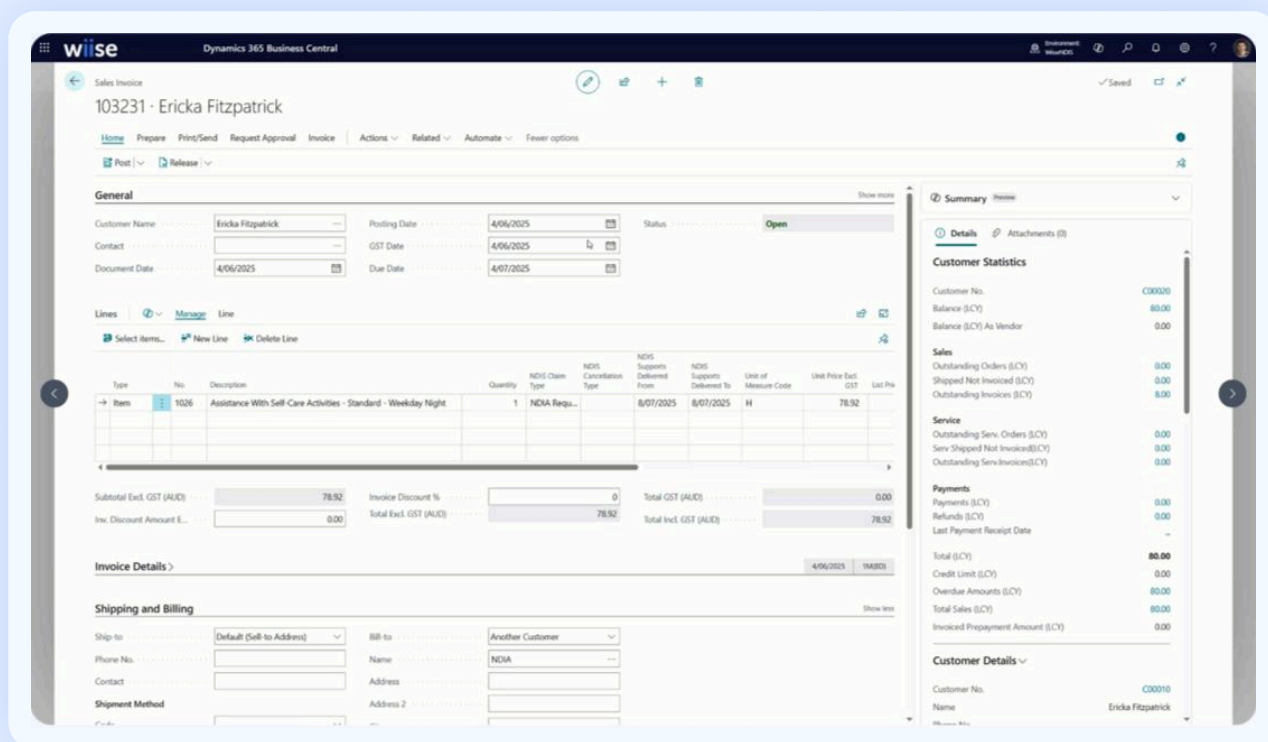
Real-Time funding and program visibility

- ✓ **Live Financial Dashboards**
Track your financial performance in real time, and drill into details such as accounts receivable, accounts payable, P&L, participant, program and service
- ✓ **Real-Time P&L by Program**
See income, expenses and margins for each service area
- ✓ **Participant funding balances**
Monitor unspent and forecasted funding in real time
- ✓ **NDIS Chart of Accounts (designed by KPMG)**
Align your financial reporting with NDIS categories for clarity
- ✓ **Remittance Advices widget**
See remittance number, import and payment dates, lines, amount and status for instant visibility of payments received from the NDIA without opening the portal.
- ✓ **Bulk payment requests widget**
See payment request ID, date, line count and total with a combined status summary of how many lines are pending, paid or need attention and drill straight into the detail.
- ✓ **Budget Overview**
See where every participant budget stands without chasing numbers across systems.
- ✓ **Participant Insights**
Check a single participant's position in seconds



Reduce admin overhead and refocus on participants

- ✓ **Integrated Payroll with SCHADS Interpretation**
Automate award-based pay, leave, and super calculations
- ✓ **Real-Time P&L by Program**
See income, expenses and margins for each service area
- ✓ **Automated Claims and Payments Workflow**
Remove manual steps from claims processing to payment reconciliation
- ✓ **Split Invoicing**
Split invoices between NDIA, plan managers, and participants.
- ✓ **Audit-Ready Reporting**
Prepare reports without manual reconciliation, easing audit prep stress.





Audit-Ready, future proof infrastructure

- ✓ **Comprehensive Audit Trails**

Every transaction, claim and change is tracked automatically for audit evidence

- ✓ **Australian Data Residency**

Data is stored in Microsoft Azure data centres within Australia

- ✓ **Secure, Scalable Infrastructure**

Enterprise-grade security with role-based access to support your growth from 20 to 200+ users without performance issues

- ✓ **Trusted AI**

Automate admin without compromising on data security with Microsoft's secure, enterprise-grade AI

ISO-Certifications



ISO 27001

(Information Security Management Systems)

Ensuring data confidentiality, integrity, and availability throughout claims and payment processing.

ISO 27017

(Cloud Security)

Maintaining the highest level of information security controls to ensure our customers' data remains secure

Wiise capabilities

NDIS Activities Supported in Wiise

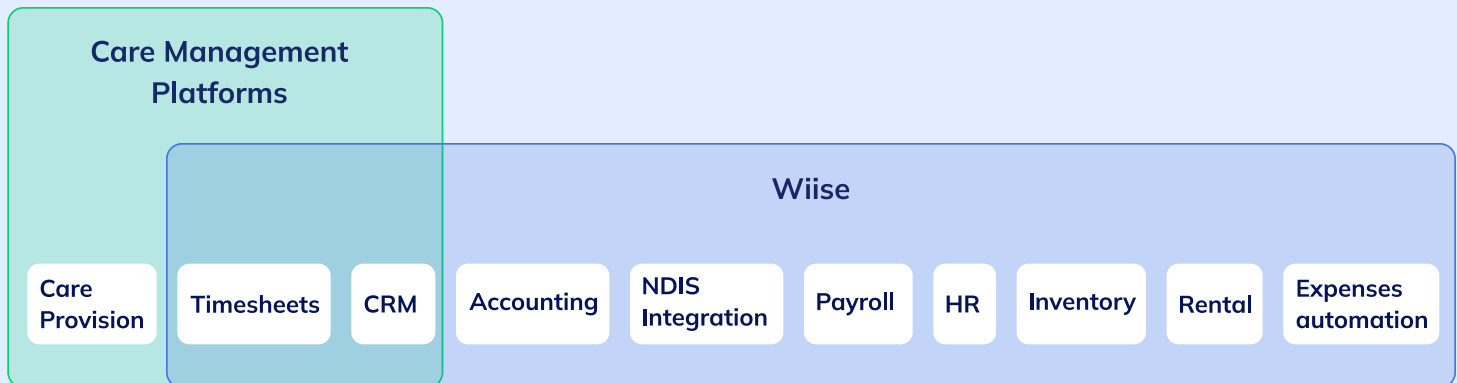
Participants & Plans	Products & Services	People	Financial Management	Compliance & Risk
Client invoice history	Product & Services pricing catalogue	Employment contracts	Invoicing	Audits
CRM (client contact details)	Vendor onboarding & assurance	Qualifications	Lodgment of payment requests	Incident management
Plan management	Budget management	Training records	Recording payments	Insurances
Outcome measurement	Vendor management	Police & Working with Children checks	Payments	Purchase approvals
Service agreements		Payroll (EH)*	Plan visibility	
Progress notes		Rostering & Timesheets (EH)*	Reporting	
Individual support plan			Claim rejection & credit handling	
Participant Plan Reassessments			Claim resubmission	
Progress reports				
Service bookings				

● Supported
● Not supported

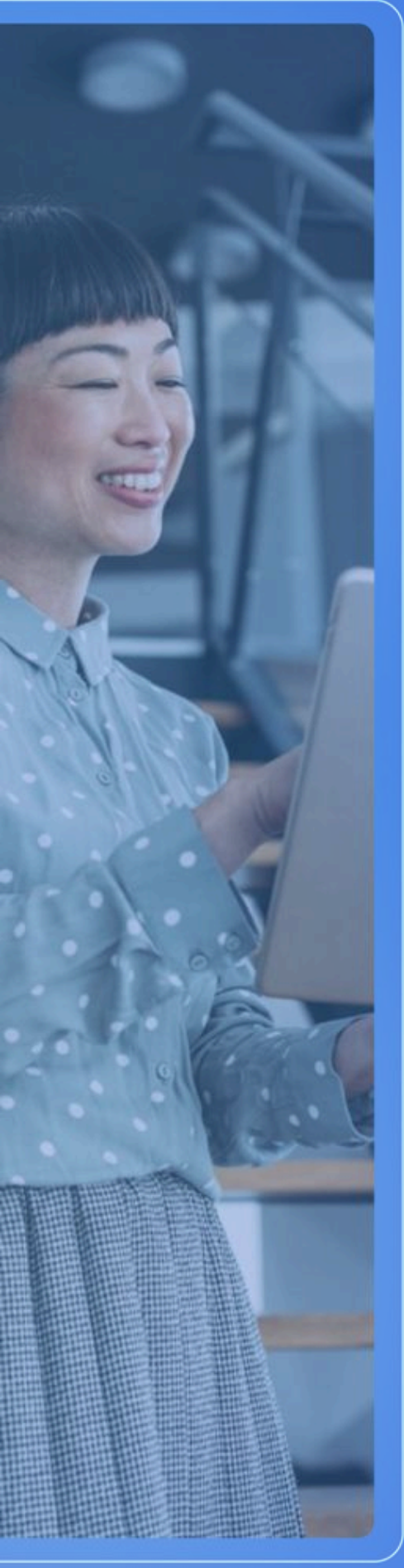


Functional map

Wiise and Care Management Platforms



Care Provision	Plan Management, Rostering, Invoicing, Field Service (mobile)
Timesheets	Capture timesheets, Interpret awards, Allocate costs
CRM	Participants, Support Workers, Medical Practitioners, Plan Managers
Accounting	Reporting, P&L, Cash Management, Assets, Bank Feeds
NDIS integration	API Integration to NDIS for claims
Payroll	Single Touch payroll
HR	Recruit, onboard, train, certify, performance manage
Inventory	Manage inventory, Wiise OnTime
Rental	Rental solution for equipment hire
Expense Automation	Automate expense management



Wiise NDIS product features



Additional NDIS fields

Feature Description

Wiise includes NDIS-specific fields in Wiise across key record types – company, customer, items, and vendors, to support accurate NDIS claims, funding tracking, and reporting.

These fields capture critical NDIS data points directly in Wiise, including:

- NDIS participant numbers
- Plan manager details
- Support item reference numbers
- Funding types
- Service booking IDs
- Price guide codes and rates
- Claim category tagging

Benefits

- ✓ **Reduce Manual admin**
Capture NDIS claim data at the source to cut double handling and errors.
- ✓ **Ensure Claim Accuracy**
Automatically align with NDIS pricing to cut rejections and speed up claims.
- ✓ **Improve Funding Visibility**
Track funding and delivery for clear insight into business health and compliance.
- ✓ **Streamline Compliance**
Maintain audit trails with accurate NDIS tagging across transactions.

Why it's important

Securely storing and tracking participant numbers, support item codes and plan manager details in Wiise helps eliminate manual workarounds or spreadsheet tracking. This means:

- Reducing risk of errors in claims
- Less admin time in reconciling payments
- Ease in responding to audits
- Clearer understanding of funding utilisation

NDIS-specific fields allow you to:

- ✓ Align your workflows with NDIS requirements
- ✓ Confidently and quickly submit and reconcile claims
- ✓ Quickly and accurately report on funding and service delivery



NDIS chart of accounts

Feature Description

Wiise supports NDIS-ready Chart of Accounts structure, allowing you to accurately track, report and manage income, expenses and funding utilisation in alignment with NDIS operation and compliance needs. This includes:

- Standardised NDIS income accounts by funding type or service
- Accounts for grants, fee-for-service, and client contributions
- Track NDIS claim rejections and adjustments
- Cost centres for programs, SIL houses, or service types
- Integrate with jobs/dimensions for advanced tracking (participant, location, program)

Benefits

- ✓ **Funding visibility**
Track NDIS funds across services, programs, and participants
- ✓ **Simplified reporting**
Generate reports by NDIS categories and management needs
- ✓ **Compliance confidence**
Maintain clean, auditable NDIS financial records
- ✓ **Informed decisions**
Analyse profitability and funding use for sustainable growth

Why it's important

Avoid generic COA structures (in Xero or MYOB) that:

- Do not align with funding streams or NDIS reporting categories
- Require manual workarounds to prepare board or compliance reports
- Make it difficult to track program or participant-level profitability

Wiise's NDIS Chart of Accounts eliminates these challenges by:

- ✓ Providing a structured, NDIS-aligned COA out of the box
- ✓ Enabling granular tracking of funding and expenses by service, location, or program
- ✓ Supporting faster, accurate preparation of claims, utilisation reports and board packs



NDIS product catalogue

Feature Description

Wiise includes an NDIS Pricing Catalogue, enabling you to load and maintain current NDIS price guide rates directly in the system for accurate billing, claims, and reporting. This allows customers to:

- Store and manage NDIS support item codes, descriptions, and unit prices
- Tag items with NDIS categories and GST/NDIS tax treatment
- Apply rates automatically during service delivery and billing
- Update pricing systematically when new NDIS price guides are released
- Manage regional pricing variations (if applicable)

Benefits

- ✓ **Reduce errors**
Ensure correct NDIS item codes and rates
- ✓ **Faster claims**
Automates billing alignment with NDIS standards for faster submission
- ✓ **Easy updates**
Easily stay up-to-date with NDIS pricing changes
- ✓ **Improve Funding Utilisation**
Track service pricing against participant plans for effective funding management

Why it's important

Manually tracking NDIS pricing can lead to:

- Outdated rates causing rejections or revenue loss
- Waste hours cross-checking item codes
- Inconsistent pricing across teams or sites

These challenges lead to delays in cash flow, compliance risk, and increased admin burden. Wiise helps by:

- ✓ Embedding the price guide into core workflows
- ✓ Ensuring the correct codes and rates on claims or invoices
- ✓ Reducing manual admin while increasing billing accuracy



NDIS invoicing

Feature Description

NDIS invoicing in Wiise lets you generate compliant, accurate invoices aligned to NDIS claims processes, drawn directly from service delivery records, participant plans and funding types. You can create single, split or bulk invoices using the correct NDIS item codes and rates, update pricing systematically when new price guides are released, and track invoice status, payments and outstanding claims in one place.

Benefits

- ✓ **Less Manual Effort**
Generate invoices with the correct NDIS codes, rates and participant details automatically.
- ✓ **Improve Accuracy**
Generate invoices directly from service delivery records and participant plans, reducing billing errors.
- ✓ **Reduce Claim Rejections**
Avoid rejections caused by incorrect codes, rates or claim details.
- ✓ **Faster Cash Collection**
Produce invoices that meet NDIS claim requirements the first time.
- ✓ **Clearer Visibility**
Track invoice status, payments and outstanding claims without separate spreadsheets.
- ✓ **Always-Current Pricing**
Update rates automatically when new NDIS price guides are released.

Why it's important

Manual preparation and tracking of invoices can cause:

- Compliance gaps from incorrect codes, rates or funding rules
- Revenue leakage from rejected or delayed claims
- Rising admin burden as participant and claim volumes grow
- Inconsistent processes across fragmented spreadsheets and double entry
- Limited oversight of outstanding invoices and claims

Wiise helps by:

- ✓ Grounding invoices in NDIS codes, rates and funding rules to strengthen compliance
- ✓ Reducing rejected and delayed claims to protect cash flow
- ✓ Lowering admin burden and cost-to-serve as volumes grow
- ✓ Standardising invoicing into one consistent, auditable process
- ✓ Giving clear oversight of outstanding invoices and claims

Restriction

How invoices are claimed and paid depends on the participant's plan management type:

- **Agency-managed (NDIA-managed)** claims are submitted to the NDIA for payment; the provider must be an NDIS-registered provider to claim.
- **Plan-managed** invoices are issued to the participant's plan manager, who processes payment against the plan; NDIS registration is not required.
- **Self-managed** invoices are issued directly to the participant, who pays and manages their own claiming.



NDIS Plan and Budget Integration

Feature Description

The NDIS dashboard capabilities are built on top of NDIS Plan and Budget Integration, the foundational feature that connects Wiise NDIS to the NDIA APIs and brings participant plan, goal, budget and service booking data into the platform.

Benefits

- ✓ **Less Manual Reconciliation**
Bring participant plan and budget data into Wiise automatically, cutting hand reconciliation.
- ✓ **Clear Funding Visibility**
See current funding positions and utilisation at a glance.
- ✓ **Earlier Risk Detection**
Spot overspending and underutilisation before they become problems.
- ✓ **Confident, Data-Driven Decisions**
Make operational and financial calls grounded in live NDIA data.
- ✓ **Insights In One Place**
Access funding insights directly within Wiise, not across disconnected reports.

Why it's important

Manual reconciliation and tracking of plan and budget data can cause:

- Time lost reconciling participant and budget information by hand
- Limited visibility into current funding positions and utilisation
- Overspending and underutilisation spotted too late
- Decisions made on stale or incomplete data
- Compliance risk from reporting that isn't grounded in NDIA data

Wiise helps by:

- ✓ Grounding insights in consent-aware NDIA data to strengthen compliance
- ✓ Providing a shared integration layer and consistent formulas you can trust
- ✓ Enabling both strategic and operational oversight of funding performance
- ✓ Creating a scalable foundation for future NDIS analytics
- ✓ Making utilisation risks visible earlier to support participant outcomes

Restriction

Access to participant plan and budget data through the NDIS APIs is tightly restricted:

- **Plan Managers** can retrieve live budget balances and funding data via the API, limited to plan-managed categories they're actively managing.
- **Support Coordinators** can access budget data via the API only where explicit participant consent has been granted and they're listed as a My Provider.
- **All other providers** have no API access to budget or funding period data, regardless of their relationship with the participant.





NDIS payment requests

Feature Description

Wiise enables you to generate, manage, and track payment requests in bulk, using accurate, compliant data directly from Wiise to streamline funding collection from the NDIA. With Wiise, you can:

- Generate NDIS payment requests that align with NDIA requirements
- Pull live service data with correct NDIS item codes, participant numbers, and rates
- Create credit notes directly from rejected payment requests
- See NDIA rejection reason codes and resubmit corrected claims without rebuilding the request
- Track payment request statuses and handle rejections efficiently
- Automatically reconcile NDIA payments against submitted claims
- Manage adjustments, reclaims and credits with clear audit trails
- Cancel approved claims via the NDIA API, with credit notes created automatically
- Create bulk requests for multiple participants, services, and periods

Benefits

- ✓ **Faster Funding Collection**
Submit bulk claims quickly, reducing the time it takes to submit a claim
- ✓ **Reduce Errors and Rejections**
Automatically populate accurate data to reduce rejections
- ✓ **Automate Reconciliation**
Match NDIA remittances to submitted claims, reducing errors
- ✓ **Improve Cash Flow**
Faster, accurate submissions to reduce delays in funding
- ✓ **Recover rejected revenue**
Correct and resubmit fixable rejections so earned revenue isn't lost to small data errors

Why it's important

Manual preparation and tracking of payment requests can cause:

- Errors and delays
- Slower cash flow from incorrect claims
- Difficult reconciliation across services
- Limited visibility of claim status

Wiise helps by:

- ✓ Automating claim generation and submission
- ✓ Using compliant data to reduce rejections
- ✓ Reconciling payments with clear audit trails
- ✓ Showing real-time status of claims and payments



NDIS PRODA connection

Feature Description

Wiise enables you to connect with the NDIA via PRODA (Provider digital Access), allowing secure, direct submission and management of payment requests and claims from within Wiise.

- Directly upload NDIS payment requests to the NDIA portal
- Supports secure authentication aligned with NDIA requirements
- Track claim statuses and responses within Wiise
- Minimise manual PRODA logins and file re-uploads, saving time and reducing errors

Benefits

- ✓ **Faster Claims Submission**
Submit bulk claims quickly, reducing the time it takes to submit a claim
- ✓ **Fewer Errors**
Eliminate file transfer mistakes for accurate submissions
- ✓ **Save Time**
Automate workflows for finance teams
- ✓ **Enhance Security**
PRODA authentication and audit trails ensure safe, compliant submissions
- ✓ **Better Visibility**
Track claim submission status and response codes directly within Wiise

Why it's important

Manual preparation and tracking of payment requests can cause:

- Extra admin logging into PRODA
- Duplicate or failed submissions
- Delays from manual portal checks
- No real-time sync with finance records

Wiise helps by:

- ✓ Connecting directly to PRODA for secure submissions
- ✓ Automating uploads and re-submissions
- ✓ Tracking claim statuses in real time
- ✓ Reducing admin



NDIS credit notes & claim recovery

Feature Description

When a claim is rejected or a service is cancelled, Wiise now closes the loop on the full claim lifecycle, letting you reverse, correct and resubmit claims without leaving the system or creating manual journals. With Wiise, you can:

- Create a sales credit note directly from a rejected payment request, auto-linked to the original posted invoice
- Cancel approved payment requests via the NDIA API, with a matching credit note created automatically on confirmation
- View NDIA rejection reason codes and descriptions inside Wiise
- Correct invoice data and resubmit rejected claims without rebuilding the payment request
- Keep receivables, credit notes and resubmissions tied together with a clear audit trail

Benefits

- ✓ **Recover revenue faster**
Fix and resubmit fixable rejections so earned revenue isn't lost to small data errors.
- ✓ **Accurate books at month-end**
Credit notes auto-close open receivables, so your financials reflect reality.
- ✓ **One system, no double handling**
Cancel claims and post credits without switching to the myPlace portal.
- ✓ **Less manual work, lower risk**
Remove manual journal entry and cross-system reconciliation.

Why it's important

Manual rejection and cancellation handling can cause:

- Open receivables left on the books after rejections
- Unreliable month-end reporting
- Duplicated effort across the NDIA portal and Business Central

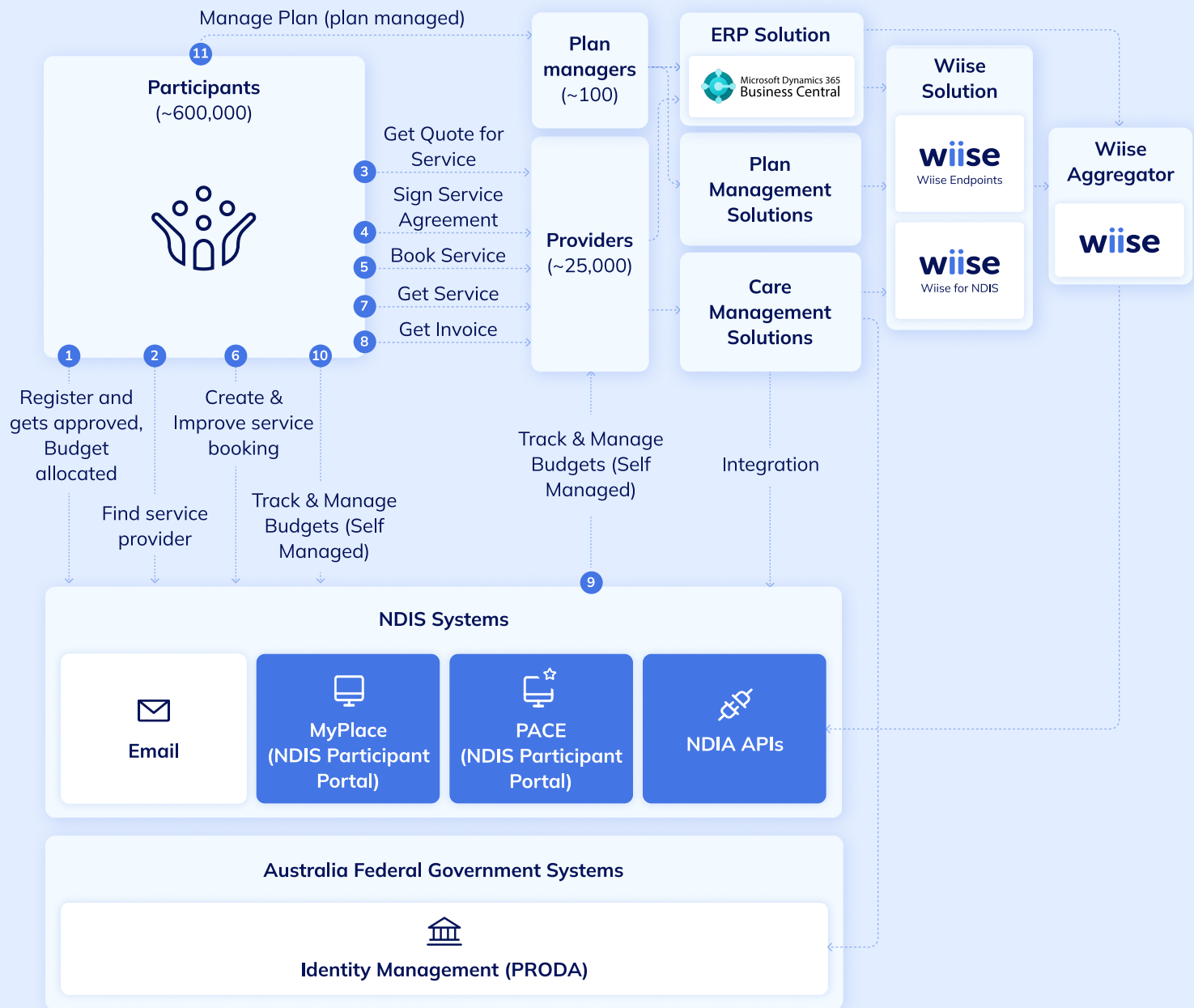
Wiise helps by:

- ✓ Generating credit notes directly from rejected or cancelled claims
- ✓ Auto-linking credit notes to the original posted invoice
- ✓ Surfacing NDIA rejection reason codes inside Wiise
- ✓ Letting you correct and resubmit without recreating the request

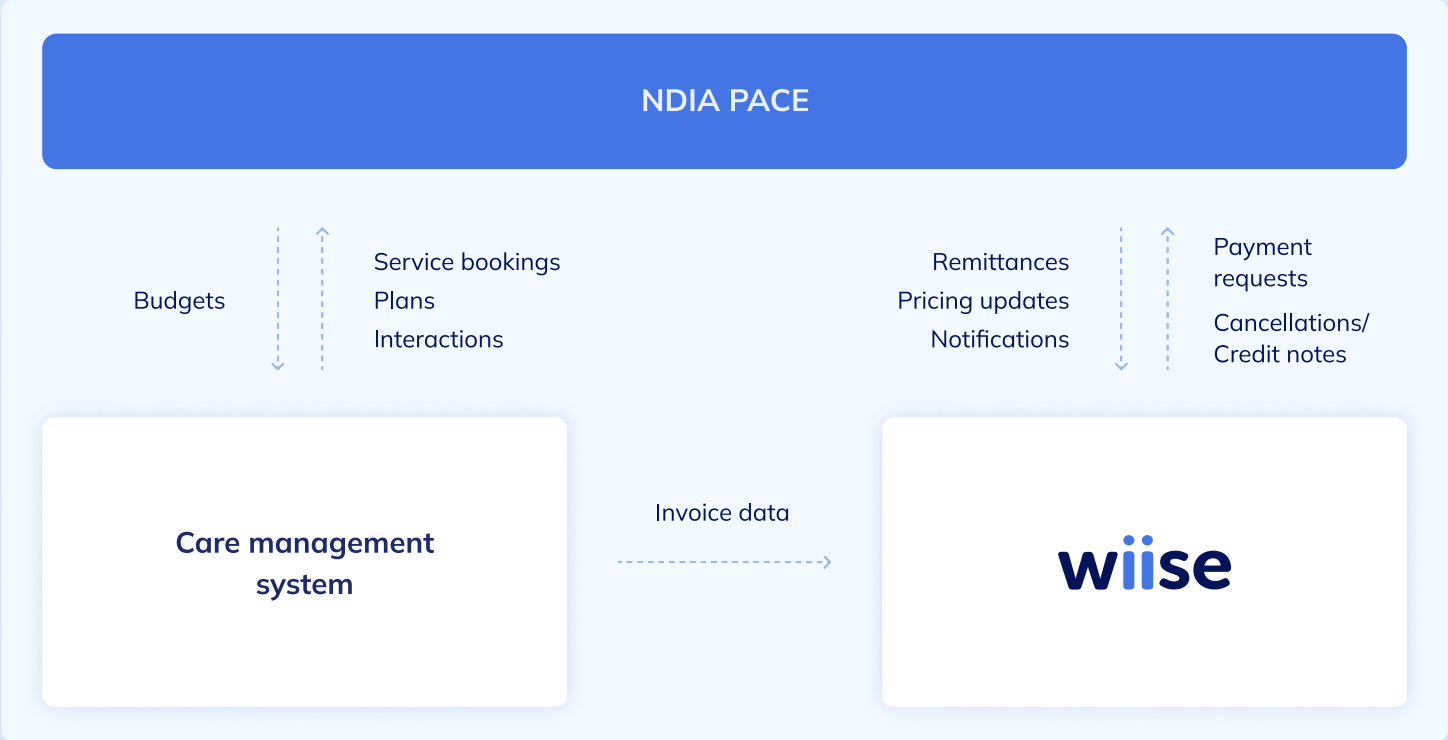


Wiise & care management integration

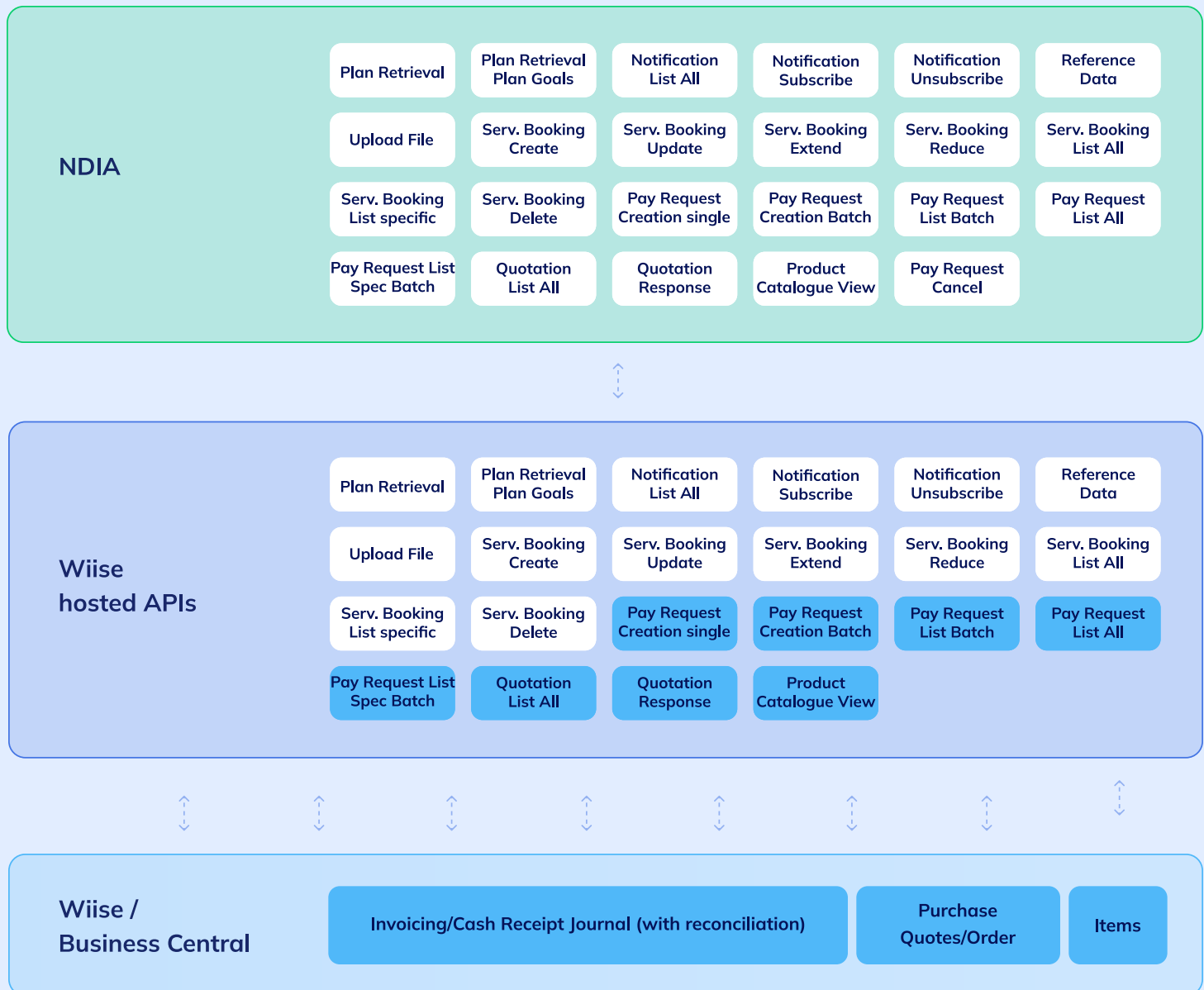
System Integration Overview



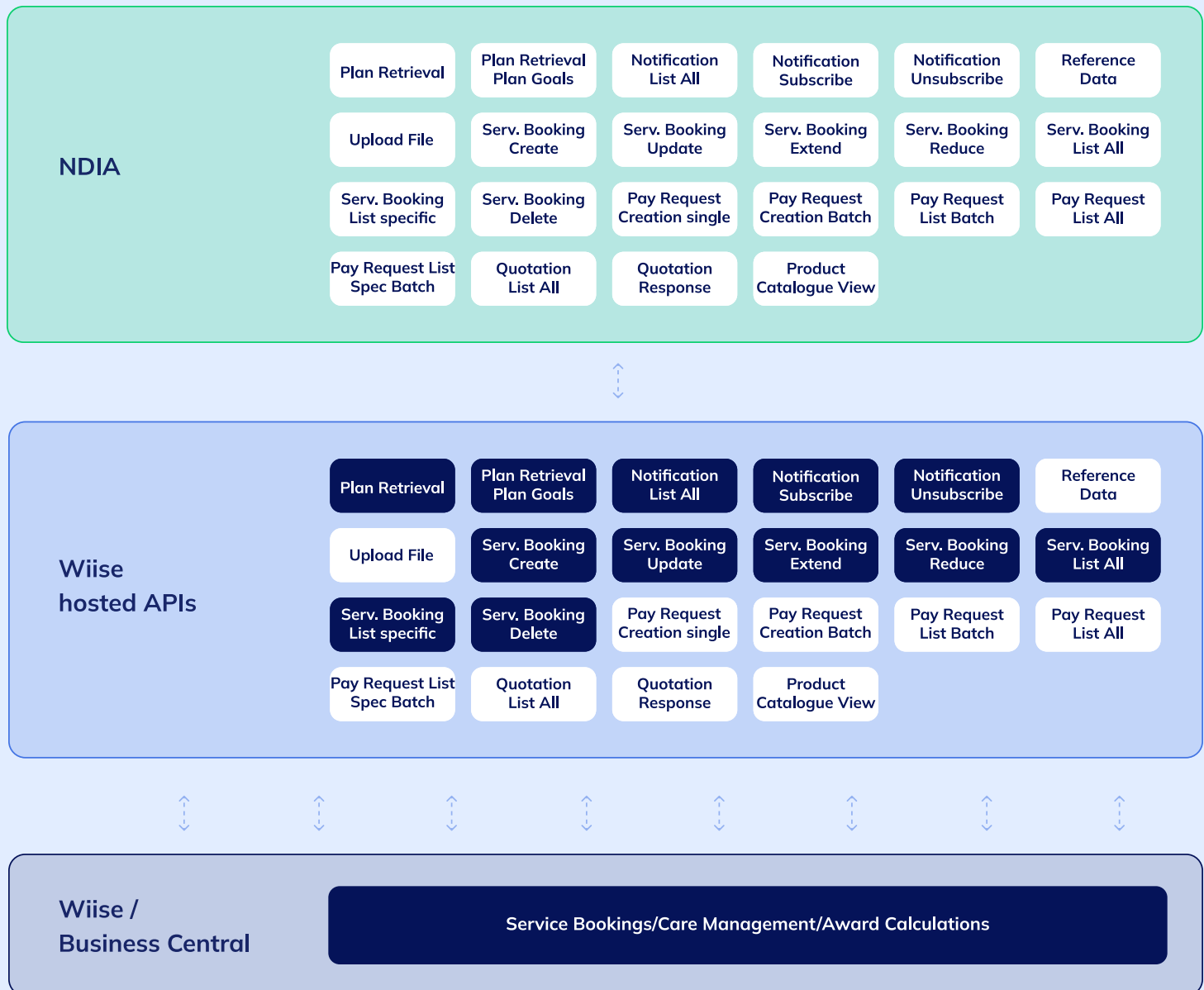
APIs available for integration with CMS



Wiise NDIA data fields



Care Management NDIA data fields





Transforming NDIS operations with Wiise

Wiise improvements

NDIS Activities Supported in Wiise

Area	Before (Care Management System + Accounting software)	After (Care Management System + Wiise)
Claims submission	<ul style="list-style-type: none"> ✗ Manual CSV upload ✗ Often completed in batches leading to delays 	<ul style="list-style-type: none"> ✓ Automated via NDIA API ✓ Bulk claims via API
Payment reconciliation	<ul style="list-style-type: none"> ✗ Manual, spreadsheet based 	<ul style="list-style-type: none"> ✓ Automated matching via API
Invoicing	<ul style="list-style-type: none"> ✗ Manual, often outside system 	<ul style="list-style-type: none"> ✓ Automated with NDIS catalogue
Payroll	<ul style="list-style-type: none"> ✗ Manual award checks ✗ Rostering data exported manually to KeyPay/Xero Payroll for processing 	<ul style="list-style-type: none"> ✓ Automated SCHADS interpretation ✓ Integrated seamlessly with financials
Cash flow	<ul style="list-style-type: none"> ✗ Spreadsheet dependent 	<ul style="list-style-type: none"> ✓ Real-time in Wiise
Reporting	<ul style="list-style-type: none"> ✗ Delay by manual processes 	<ul style="list-style-type: none"> ✓ Faster, automated pipeline
Plan Management	<ul style="list-style-type: none"> ✗ Manual consolidation 	<ul style="list-style-type: none"> ✓ Real-time, audit-ready
Rostering	<ul style="list-style-type: none"> ✗ Funding utilisation reports 	<ul style="list-style-type: none"> ✓ Multi-dimensional reporting
Invoicing	<ul style="list-style-type: none"> ✗ Program-level financials 	<ul style="list-style-type: none"> ✓ Credit notes generated automatically from rejected or cancelled claims; reason codes shown in-app; corrected claims resubmitted without rebuilding
Field Service (mobile)	<ul style="list-style-type: none"> ✗ Manual credit notes in the accounting system; cancellations done separately in the myPlace portal; rejected claims rebuilt from scratch 	
Rejections		
Cancellations		
Credits		

The financial impact of Wiise



172%
ROI



\$484k
Benefits PV



\$306k
NPV



7 months
Payback



The old accounting system would've needed double the hands on deck to facilitate the finance, given how much we've grown.

Matt Frecker, CFO at CVGT

cvgt



Get in touch today.

Wiise helps you see your business clearly so you can focus on what counts. Get Wiise and connect your people, processes, and data like never before.



See how Wiise can help

Scan the QR code or visit
wiise.com/ndis

