wiise

Capability guide for NDIS providers

The only ERP integrated with the NDIA

momentum SOFTWARE SOLUTIONS

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Contents.

A bit about Wiise 3

Wiise for NDIS 4

NDIS features and capabilities 6

Wiise & Care Management functional map 12

Wiise capabilities 13

Wiise NDIS product features 14

Wiise & Care management integration 21

Transforming NDIS operations 26

“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

wiise

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

Microsoft Dynamics 365 Business Central

Securely managed

ISO 27001

Consumer Data Right

Trusted by 350+ Australian and New Zealand Businesses

cvgt australia · CIVIC · Dover Heights Community Preschool · Business SA Chamber of Commerce and Industry South Australia · HOTA

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

- Hand-picked Implementation Partners
- Local Support Team
- Validated Integrations
- Flexible Billing Arrangements

Operational Essentials Built-in

- Payroll
- Bank Feeds
- ePayments
- Reporting
- KPMG Chart of Accounts
- Landed Costs

Microsoft Dynamics 365 Business Central

- Finances
- Inventory
- Sales & Service
- Jobs & Projects
- Reporting
- Supply Chain

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

- **Manual NDIS claims and payment reconciliation** drain staff time and delay 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, Quickbookst
Payroll	ADP, Micropay, Caremaster, and many more
HR	Imo, 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

- 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

Get paid faster

with fewer errors

- **NDIA API integration**

  Submit claims (including bulk claims) directly from Wiise, eliminating manual uploads

- **Automated Remittance Retrieval**

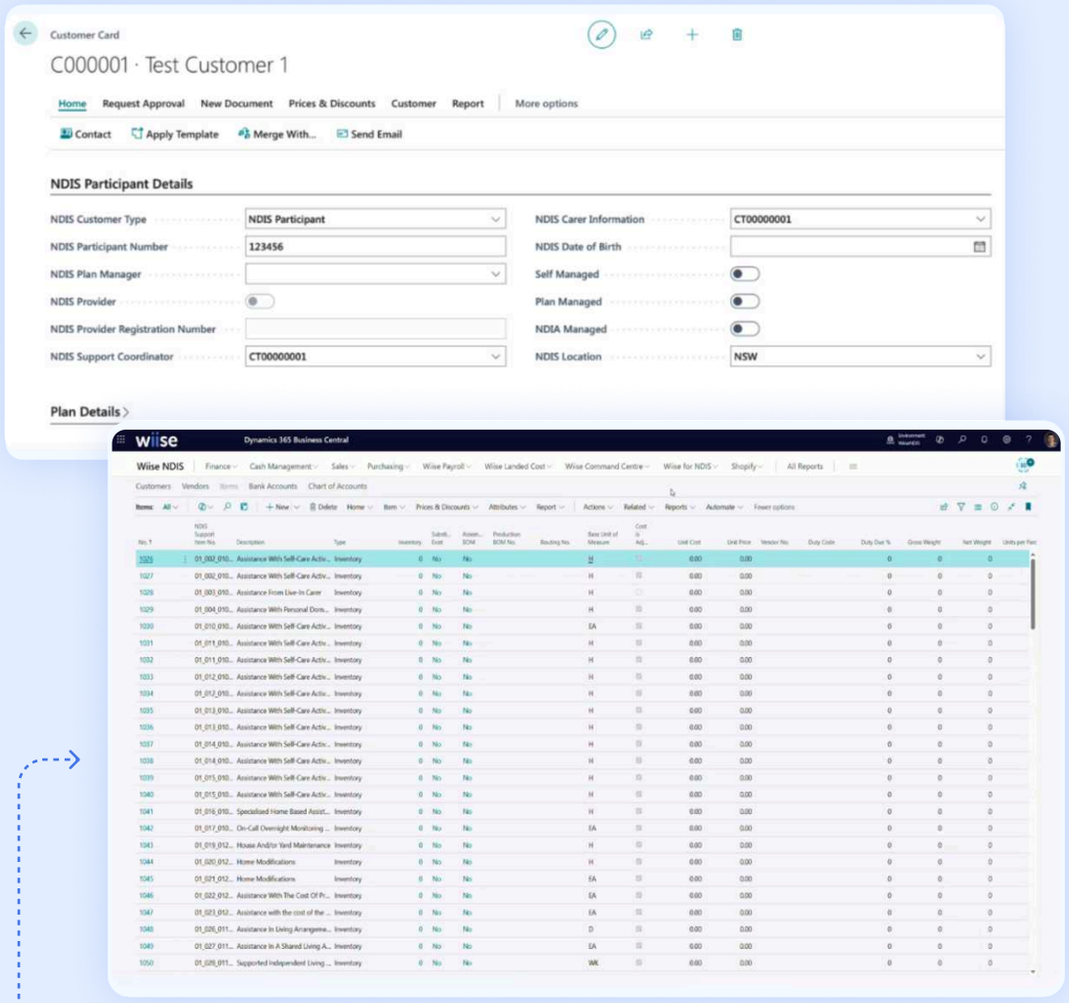
  Automatically fetch payment remittances from NDIA

- **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

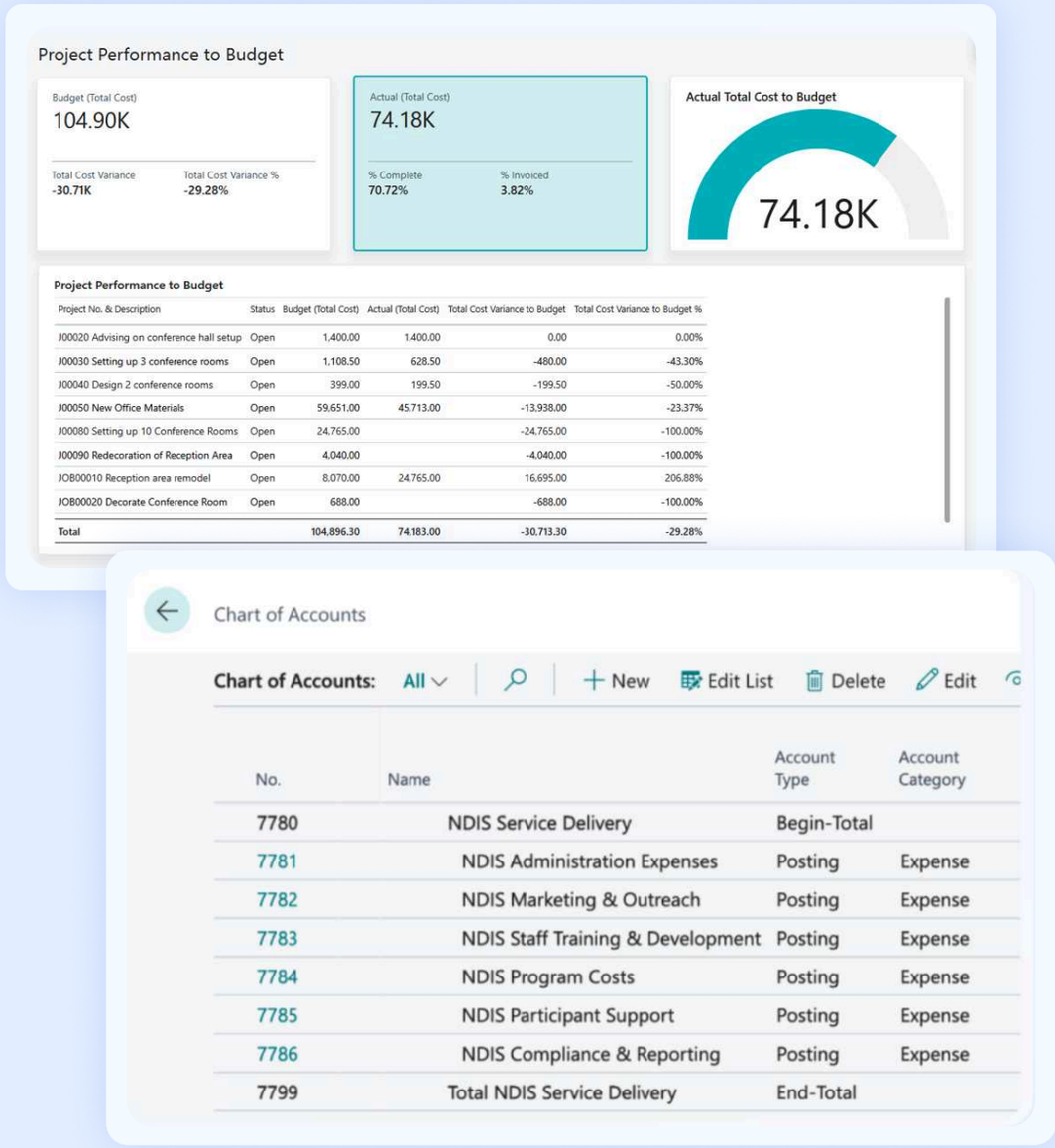
- **Participant funding balances**

  Monitor unspent and forecasted funding in real time

- **NDIS Chart of Accounts (designed by KPMG)**

  Align your financial reporting with NDIS categories for clarity

Multi-dimensional reporting



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**

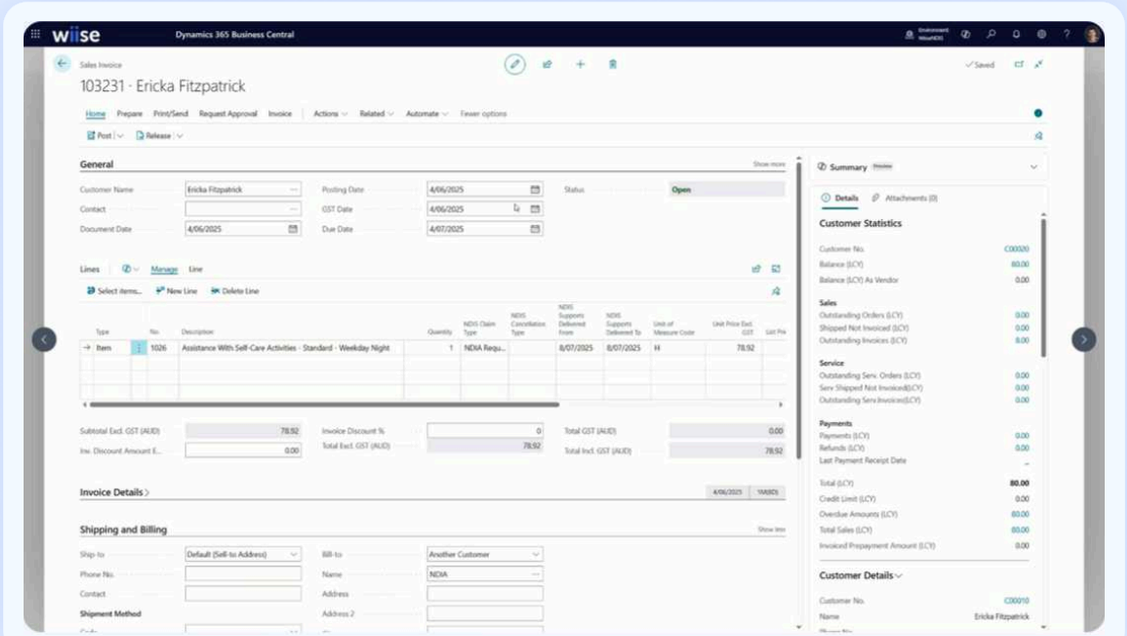
  Remove manual steps from claims processing to payment reconciliation

- **Split Invoicing**

  Split invoices between NDIA, plan managers, and participants.

- **Audit-Ready Reporting**

  Prepare required reports without manual reconciliation and collation, reducing 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

Functional map

Wiise and Care Management Platforms

Care Management Platforms

Wiise

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

Wiise capablities

NDIS Activities Supported in Wiise

Participants & Plans

- Client invoice history
- CRM (client contact details)
- Plan management
- Outcome measurement
- Individual support plan
- Service agreements
- Progress notes
- Participant Plan Reassessments
- Progress reports
- Service bookings

Products & Services

- Product & Services pricing catalogue
- Vendor onboarding & assurance
- Budget management
- Vendor management

People

- Employment contracts
- Qualifications
- Training records
- Police & Working with Children checks
- Payroll (EH)*
- Rostering & Timesheets (EH)*

Financial Management

- Invoicing
- Manual lodgment of payment requests
- Recording payments
- Payments
- Financial budgeting
- Reporting

Compliance & Risk

- Audits
- Incident management
- Insurances
- Purchase approvals

- Supported
- Not supported

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
- Enable 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
- Ensure the correct codes and rates on claims or invoices
- Reducing manual admin while increasing billing accuracy
- Supporting fast, compliant claim preparation and submission

NDIS invoicing

Feature Description

NDIS has complex invoicing requirements. Wiise provides NDIS-specific invoicing functionality that allows you to generate compliant, accurate, and automated invoices aligned with NDIS claims processes. With Wiise, you can:

- Generate invoices with NDIS item codes and rates
- Automatically link services delivered to participant plans and funding types
- Create single, split, or bulk invoices
- Update pricing systematically when new NDIS price guides are released
- Track status, payments, and outstanding claims

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 management

Why it's important

Manual preparation of invoices can lead to:

- Claim rejections from incorrect codes, rates, or details
- Delayed cash flow from invoice or claim discrepancies
- Difficulty tracking outstanding invoices and claims

These increase admin burden, reduce funding efficiency, and expose you to compliance risks. Wiise helps by:

- Automating compliant, accurate invoice generating from service delivery records
- Integrating pricing, participant funding details and NDIS-specific fields
- Reducing claim rejections and speeding up payment collection
- Providing clear visibility into the claims and cash flow

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
- Create bulk requests for multiple participants, services, and periods
- Pull live service data with correct NDIS item codes, participant numbers, and rates
- Track payment request statuses and handle rejections efficiently
- Automatically reconcile NDIA payments against submitted claims
- Manage adjustments, reclaims and credits with clear audit trails

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

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 ensures safe, compliant submissions

Better Visibility
Track claim submission status and response codes directly within Wiise

Why it's important

Manual preparation and submission of claims can cause:

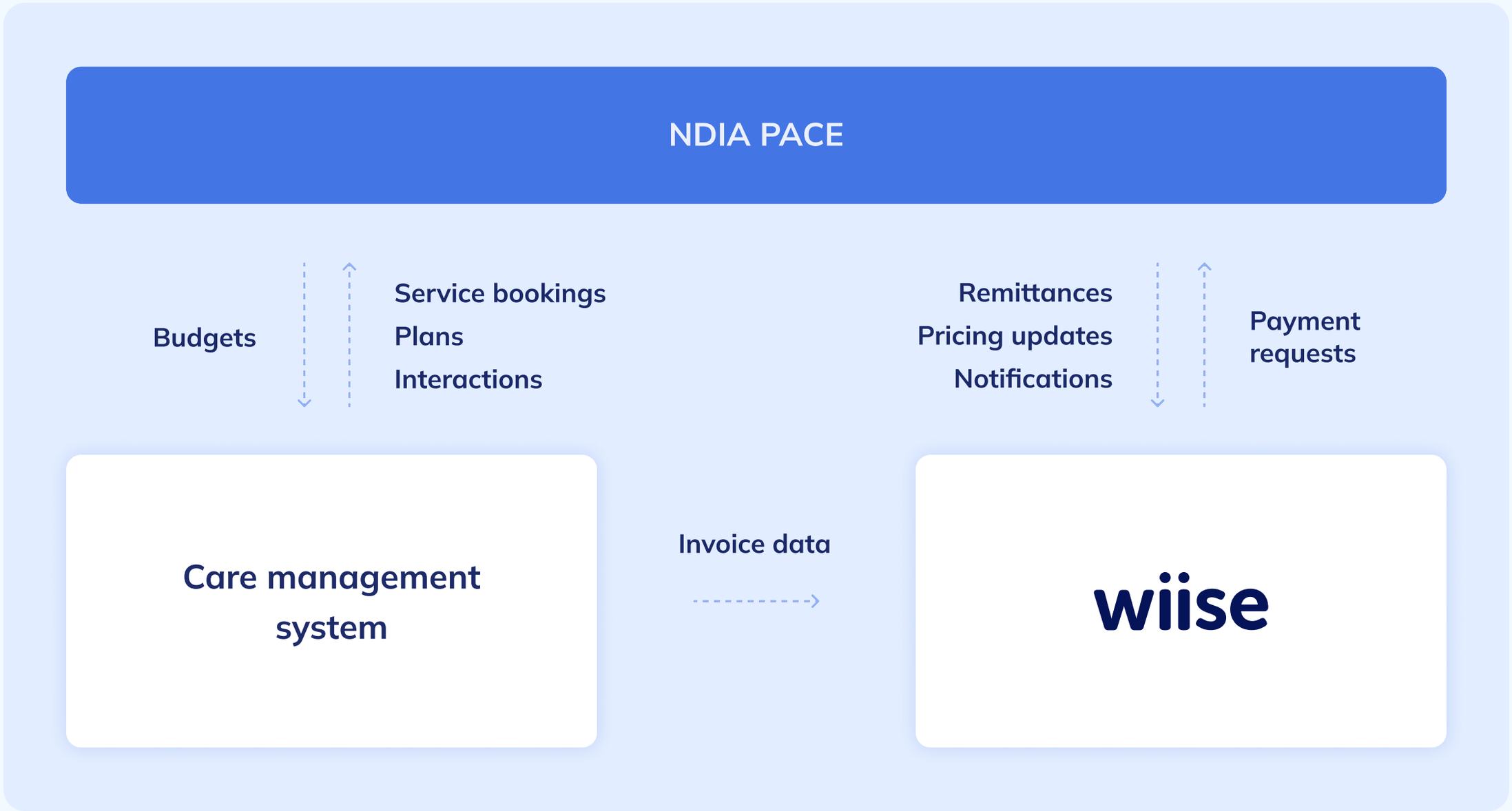
- Extra admin logging into PRODA
- Duplicate or failed submissions
- Delays from manual portal checks
- No real-time sync with finance records

Wiise helps by:

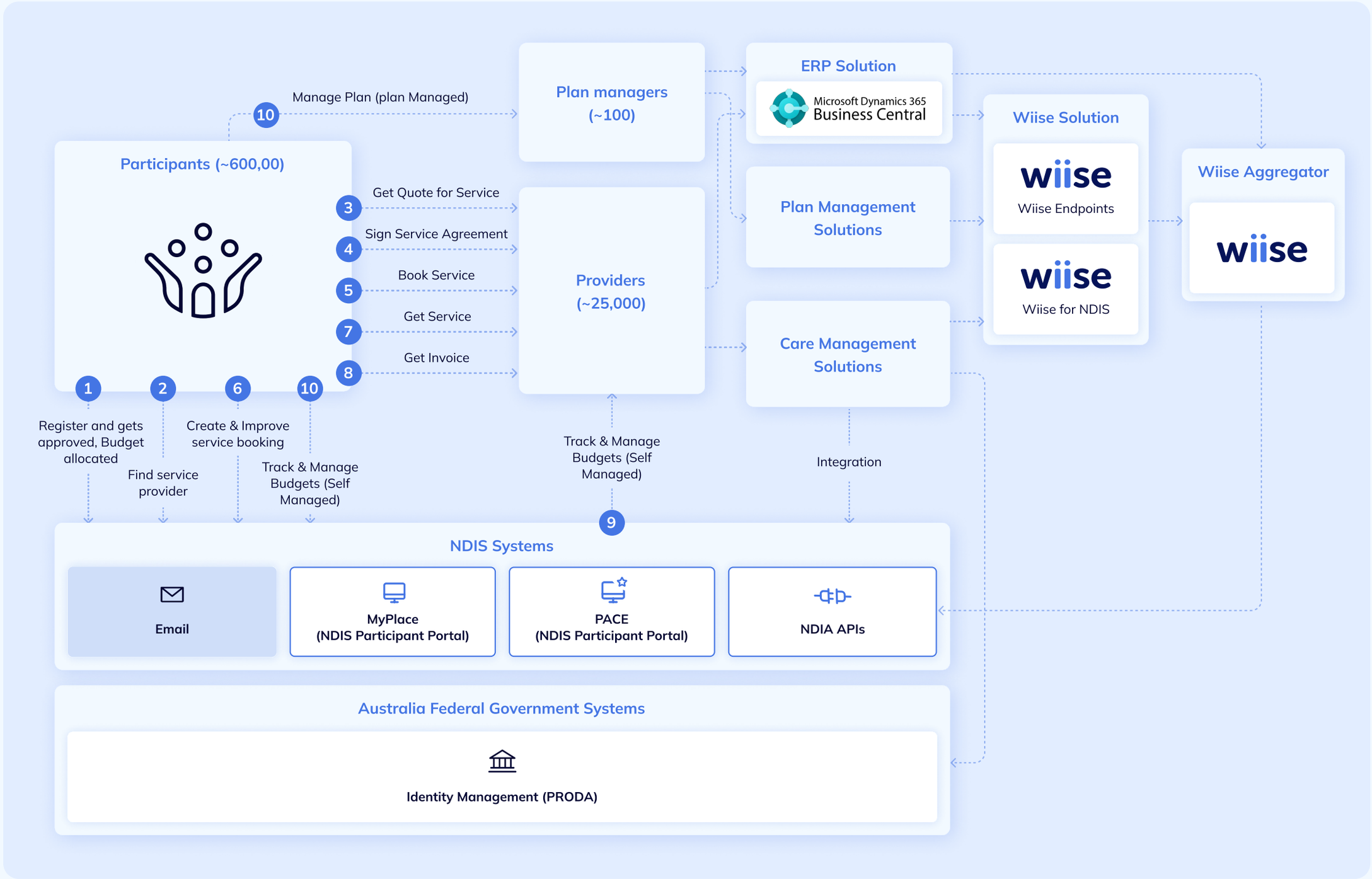
- Connecting directly to PRODA for secure submissions
- Automating uploads and re-submissions
- Tracking claim statuses in real time
- Reducing admin

Wiise & care management integration

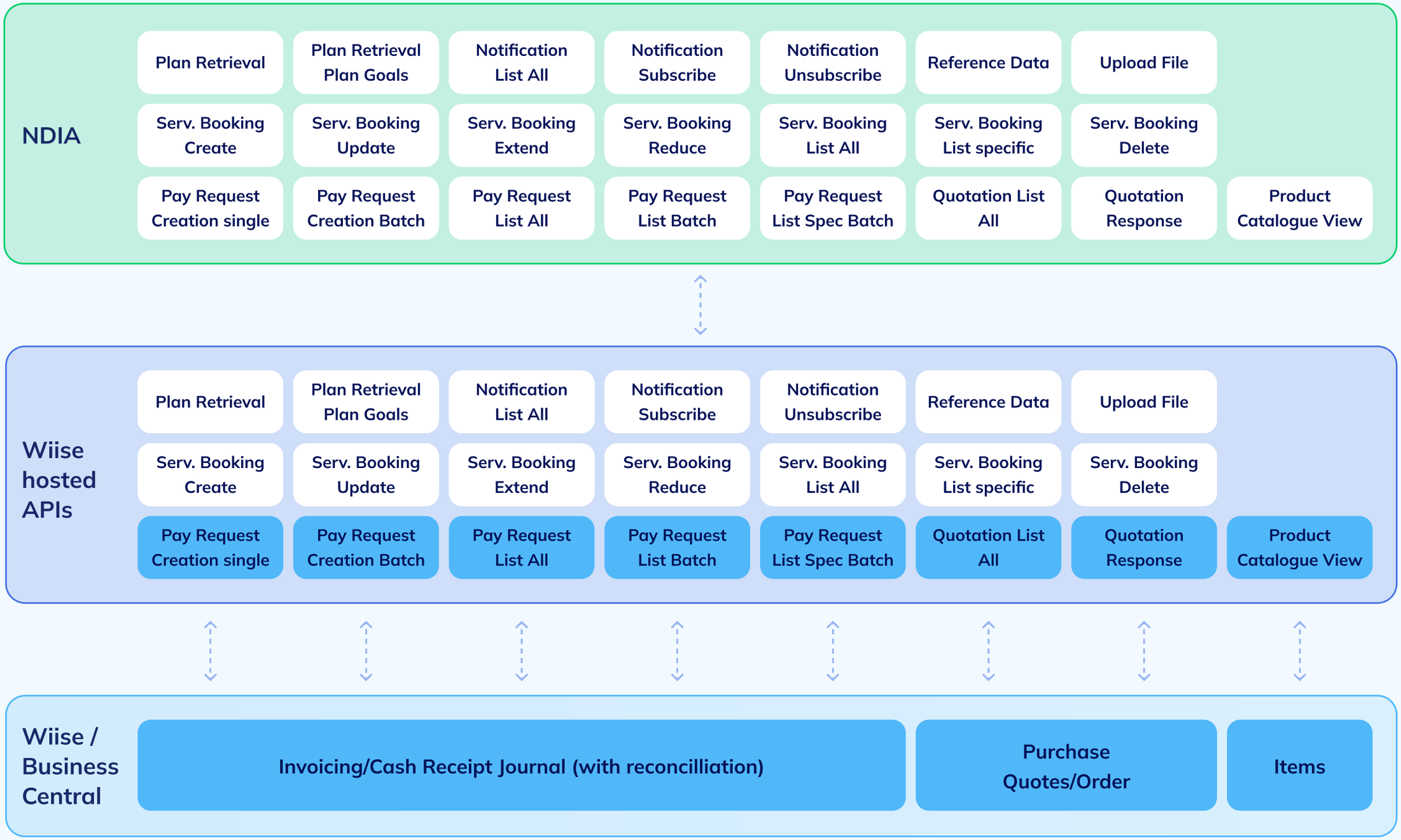
API Integration between systems



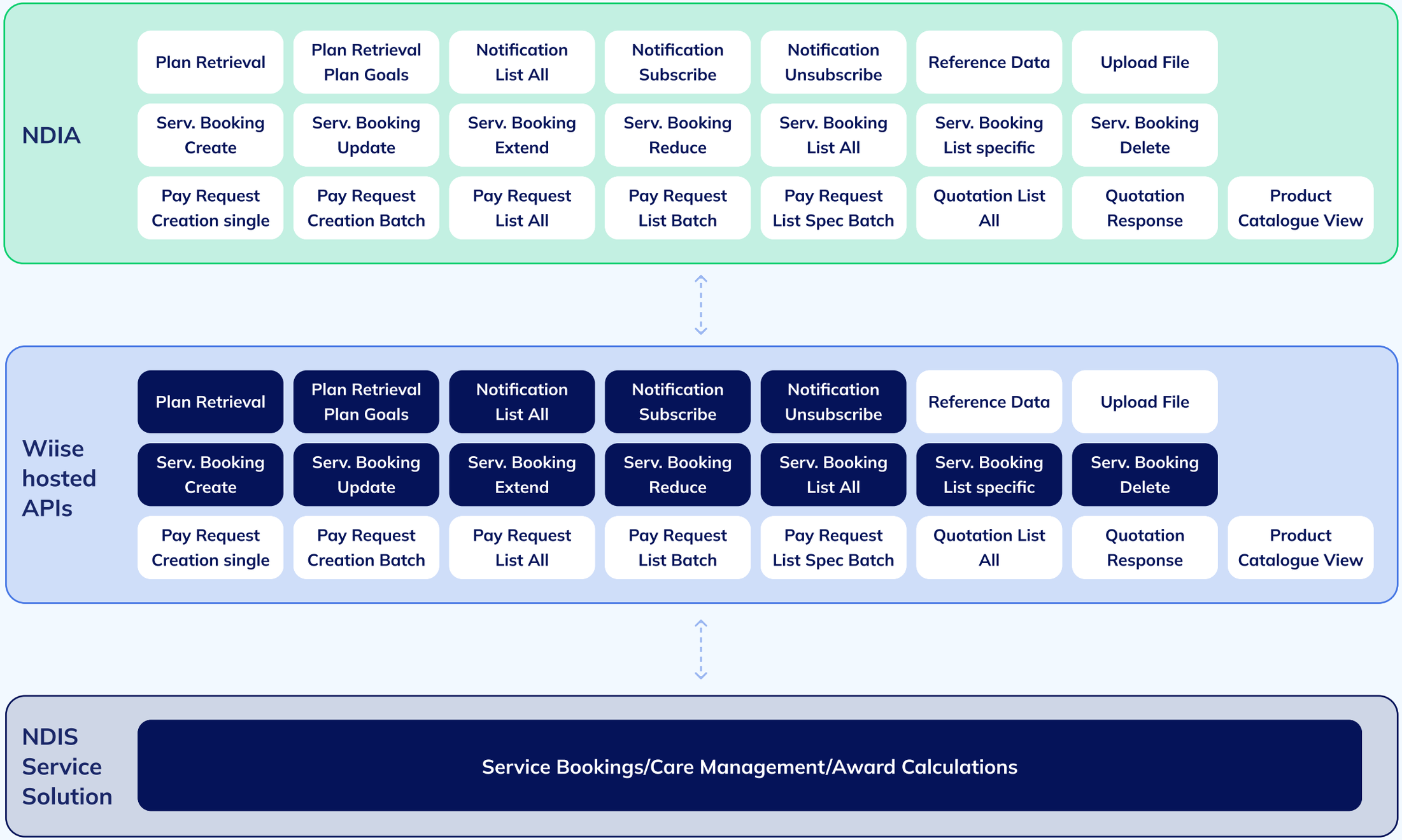
System Integration Overview



Wiise NDIA data fields



Care Management NDIA data fields



Transforming NDIS operations with Wiise

Wiise improvements

Area	Before (Care Management System + Accounting software)	After (Care Management System + Wiise)
Claims submission	✕ Manual CSV upload ✕ Often completed in batches leading to delays	✓ Automated vid NDIA API ✓ Bulk claims via API
Payment reconciliation	✕ Manual, spreadsheet based	✓ Automated matching via API
Invoicing	✕ Manual, often outside system	✓ Automated with NDIS catalogue
Payroll	✕ Manual award checks ✕ Rostering data exported manually to KeyPay/Xero Payroll for processing	✓ Automated SCHADS interpretation ✓ Integrated seamlessly with financials
Cash flow	✕ Spreadsheet dependent	✓ Real-time in Wiise
Reporting	✕ Delay by manual processes	✓ Faster, automated pipeline
Plan Management Rostering Invoicing Field Service (mobile)	✕ Manual consolidation ✕ Funding utilisation reports ✕ Program-level financials	✓ Real-time, audit-ready ✓ Multi-dimensional reporting

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Further reading...

Wiise for NDIS whitepaper

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.

Speak to the team at Momentum:

Email enquiries@momentumss.com.au

or visit www.momentumsoftwaresolutions.com.au