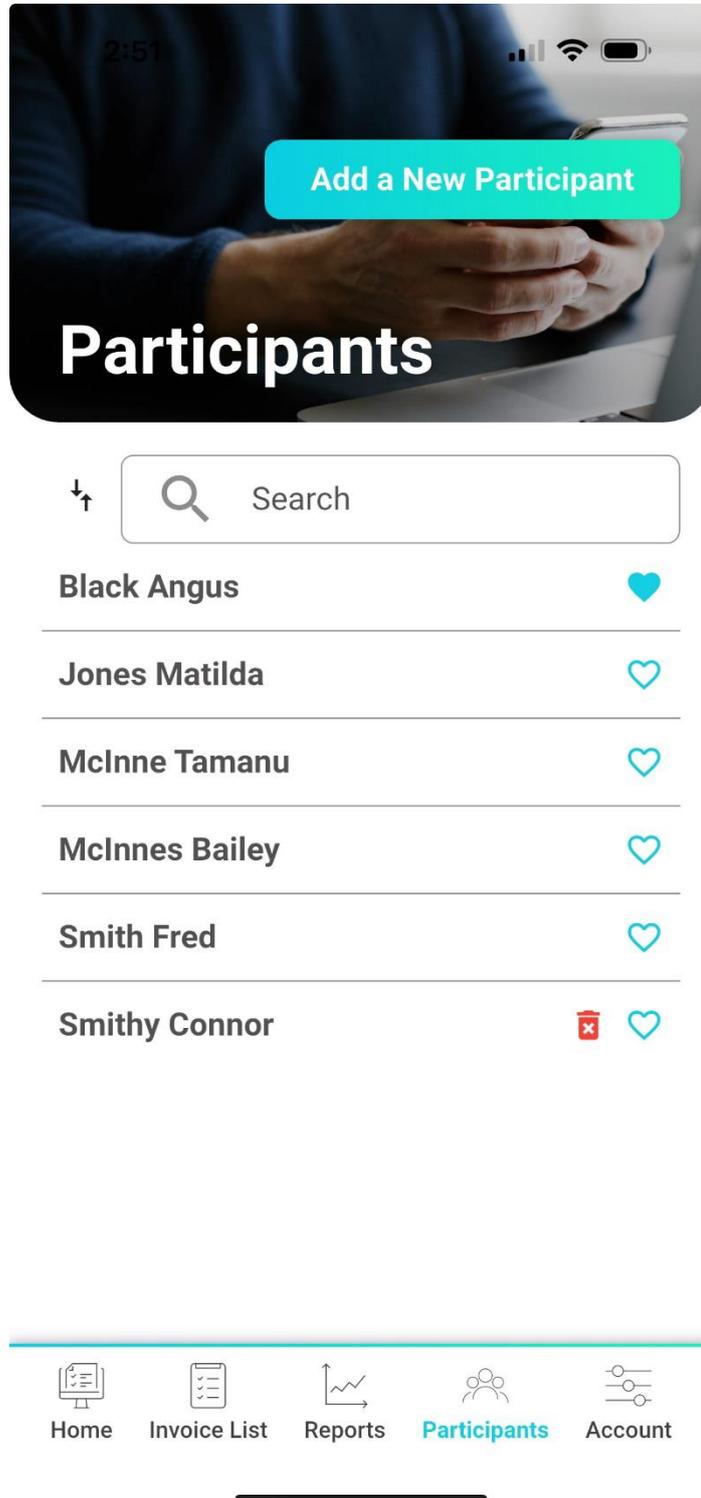


♥ Participants Create, Edit & View ♥

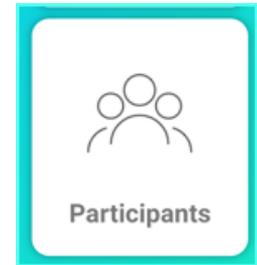
Welcome to EasyAs Invoicing!

Below is an explanation of the Participants screen functions and features.





A full list of your Participants can be found when you select the **Participants** icon



Use the **Love Heart** to select the Participants that you issue the most invoices for so that these Favourites appear at the top of your Participant list

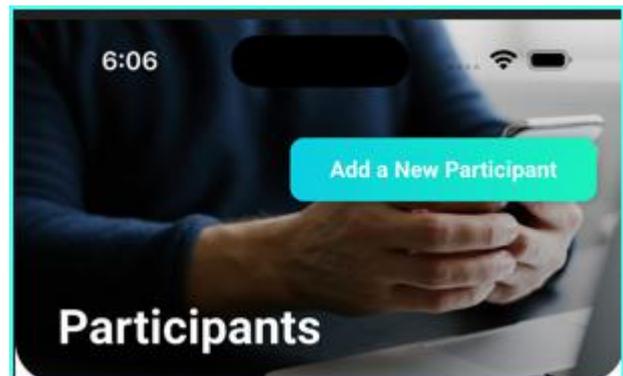


Use the **Trashcan** icon to **Delete** Participants. This option can only be used when no invoices have been issued for the Participant



Create a New Participant Profile

Select the **Add a New Participant** icon



♥ Enter your Participants details:

- **First & Last Name**
- **Participant State** (NDIS rates are sometimes different depending on the state the participant lives in)
- **Participant Email** (this is optional, however if you select to email the invoice to the participant this will become Required to complete)
- **Participant NDIS Number**, please include this if you have the information – it will make it easier for NDIS Plan Managers to confirm the correct participant is being invoiced
- **Participant Address**, please include this if you have the information – it will make it easier for NDIS Plan Managers to confirm the correct participant is being invoiced
- **Participant Mobile Number**, optional
- **Funds Management Type**, must select either Plan Managed or Self-Managed:
 - Plan Managed** – select Plan Manager from drop down list or create a New Plan Manager if you're unable to find them in the pre-populated list
 - Self Managed** – ensure you have the Participants Email address completed so that they are emailed a copy of their invoices for payment
- **Email Invoices to Participant:**

Email Invoices to Participant

Plan Managed only select this for participants if they are requested to be emailed copies of all invoices

Self Managed participants ensure the check box is ticked so that they are emailed invoices for payment



Last name* *Required*

First Name* *Required*

Participant State for Invoicing* *Required*

▼ Select State for Invoicing

Participant Email *Optional*

NDIS Number *Optional*

Address *Optional*

Mobile Number *Optional*

Funds Management Type* *Required*

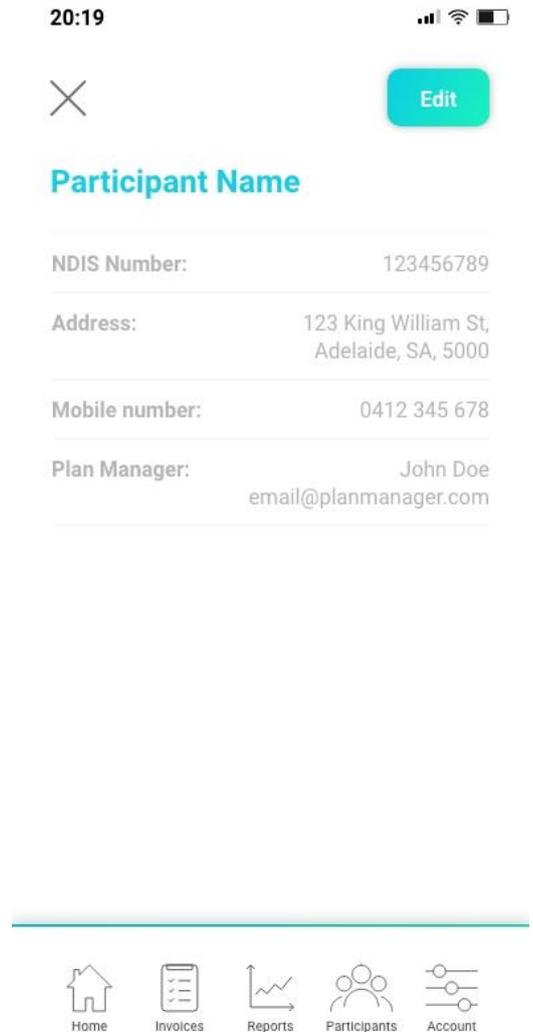
▼

Email Invoices to Participant

Add Participant

♥ Edit a Participant Profile ♥

Select the **Edit** icon to amend your participant details



20:19 📶 📶 🔋

✕ Edit

Participant Name

NDIS Number: 123456789

Address: 123 King William St,
Adelaide, SA, 5000

Mobile number: 0412 345 678

Plan Manager: John Doe
email@planmanager.com

Home Invoices Reports Participants Account