![Headway Gippsland Inc. logo]

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Adding client funding records

This is for support coordination, 1:1 support work and SSG social support groups.

- Open Brevity
- Open Client Tab
- Select Client
- Search for the client with either first or surname.
- Double click on client name

File needs to be double checked for compliance.

- "Support Workers" need to be linked and updated with current employees only.
  Please use this for support coordinators. Engagement Coordinator will update the link for their own LSO staff
- Find client funding on right hand side of the main client screen

- If you are updating the file with a new plan then double click the funding record to open it.
- If you are entering a new funding record follow the steps to add the funding in the next section.

Adding client funding records

Funding needs to be unpublished and deactivated.

- Click unpublish
- Click ok
- Click deactivate

| 🗎 Funding Report | + Bulk Add Services | ⍼ Publish | ⌶ Edit Name | ⎘ Create Copy | ⊘ Deactivate | 🖨 | 🗑 Delete |

Start Date*	🗓 Mon,20/03/2023
End Date*	🗓 Tue,19/03/2024
Budget*	6008.40
Allocated	1374.92
Utilised Total*	1374.92
Opening Balance	0.00
Balance*	4633.48

- Click Save
- Click close (this will finalise the deactivation.
- Click save on main client file.
- Scroll back down to the client funding record section
- Click the plus sign

Adding client funding records

- Complete the required fields based on the NDIS plan
- If the funding line item you are loading is for social community access then the funding source will relate to how the funding is managed i.e. plan managed or NDIA managed

My Core Supports funding will be:

- $60,203.04 Plan-managed

OR

If you are loading support coordination funds check how this funding is managed to ensure you are selecting the correct funding source.

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

My Stated Supports funding will be:

- $12,016.80 NDIA-managed
  Level 2: Coordination Of Supports

Adding client funding records

- Click funding source
- Options will show as a list. Select appropriate based on service as mentioned above. Plan managed funding is PLAN, NDIA managed funding is NDIS, Support Coord funding that is plan managed will also be PLAN and have an "invoice to" section to be included. i.e. headway Gippsland.
- Click which source you require
- Click price list
- Select most recent

Pricelist*   🔍 NDIS JUL-22

- Enter start date as the NDIS plan start date
- Enter end date as the NDIS plan end date
- Budget is what is shown on NDIS plan

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

My Stated Supports funding will be:

- $12,016.80 NDIA-managed
  Level 2: Coordination Of Supports

- Click save

Now you will need to enter the service

- Click on the plus in the services section

Services

Services   +

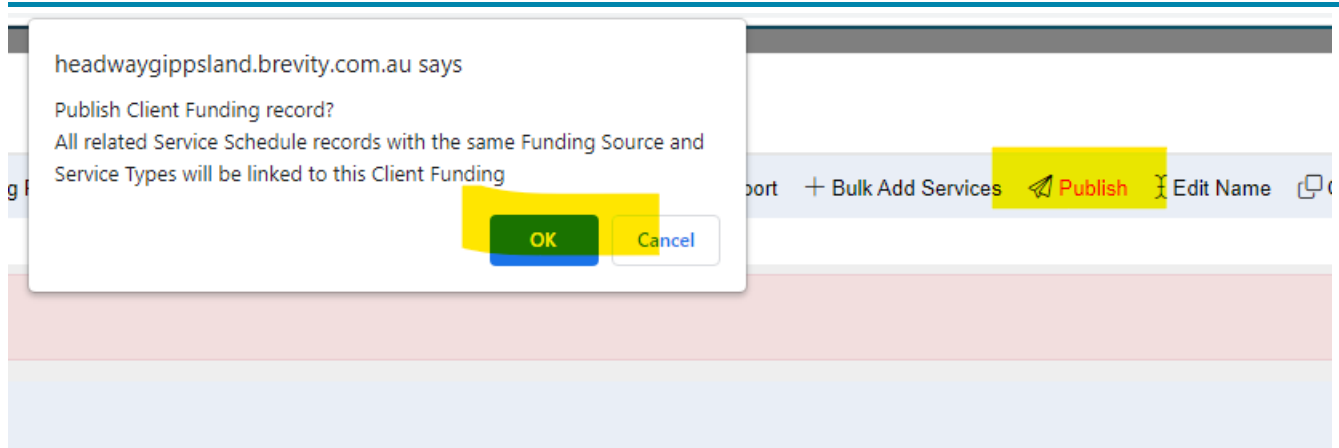| Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	Create
No data available in table						

Showing 0 to 0 of 0 entries

Adding client funding records

- Click service type (this relates to the service being provided. i.e. coordination of supports)

- Enter budget as per NDIS plan
- Click the yes buttons on the right hand side for billing purposes.
- Click save
- Click close
- Click save on main funding
- Now publish the funding
- Click publish

Adding client funding records

headwaygippsland.brevity.com.au says

Publish Client Funding record?
All related Service Schedule records with the same Funding Source and
Service Types will be linked to this Client Funding

OK **Cancel**

...ort + Bulk Add Services ✈ Publish ⌶ Edit Name

Budget

Start Date*	📅 Tue,11/04/2023
End Date*	📅 Wed,10/04/2024
Budget*	6008.40
Allocated	
Utilised Total*	0.00

- And click OK
- Click close