

## Adding plan management funding in Brevity

Open Client file – enter client first name or last name

Double click on client name

Find Plan Management Funding – right side of the screen half way down

Click on the plus in the right corner (shown below)

### Plan Management Funding




Name	Funding Source	NDIS Number	Pri
Abel, Leslie - 0669 - NDIS - 06/22 to 06/24	PLAN	430633904	NDIS

Showing 1 to 1 of 1 entries

Previous Next

### 1. Click new

+ New  Edit

New Plan Management Plan record

Close

On this form: Plan Details Budgets Invoices

Step 1 - Client details

Client details

Existing Client?\*  Yes  No

Client\*

2. Enter client name (as above)

Edit Plan Management Plan record

Close

On this form: Plan Details Budgets Invoices

Step 2 - Plan details

Details

Funding Source\*

Pricelist\*

Price Guide\*

Service Agreement Start Date

Start Date

Back Next

3. Funding source – relates to what services your loading for the client. At the moment we only use this section for plan management so the funding source will always be PLAN
4. Pricelist – refers to current list. i.e. Jul 22
5. Price guide – state your located i.e. VIC (NSW, VIC, QLD, ACT)
6. Service Agreement start date – for a continuing client this remains as the PLAN start date. For a NEW client this date must be the date they commence with Headway.
7. Completed below –

Edit Plan Management Plan record

Close

On this form: Plan Details Budgets Invoices

Step 2 - Plan details

Details

Funding Source\*

Pricelist\*

Price Guide\*

Service Agreement Start Date

Start Date

Back Next

## 8. Click Next

Edit Plan Management Plan record

Close

On this form: Plan Details Budgets Invoices

### Step 3 - Financial details

**Fees**

Charge Setup Fee?  Yes  No

Setup Fee\* 232.35

Start Date

End Date

Charge Service Fee?  Yes  No

Months\* 7

Service Fee\* 104.45

Service Fee Total\* 724.71

**NDIS Plan Details**

NDIS Plan Id\* 1251645

NDIS Plan Start Date\*

NDIS Plan End Date\*

Back Next

This section pre-populates.

Check that charge set up fee line is marked as “YES”

Check that Charge Service Fee line is marked as “YES”

Click Next

Edit Plan Management Plan record

Close

On this form: Plan Details Budgets Invoices

Person Document Money Checkmark

### Complete

Saved	Category	Message
<input checked="" type="radio"/>	CB_CHOICE_CONTROL	
<input checked="" type="radio"/>	CB_CHOICE_CONTROL	

Showing 1 to 2 of 2 entries

Previous 1 Next  
Back Finish

This screen is advising of the charges for both service and set up

Click Finish

Leave site?

Changes you made may not be saved.

## Select Leave

You will now see the funding screen for the clients NDIS plan.

Edit Plan Management Plan record

Client\* Simpson, Logan - 9308  
 Funding Source\* NDIS  
 NDIS Number\* 438392409  
 Pricelist\* NDIS JUL-22  
 Price Guide\* NSW, VIC, QLD, ACT

Start Date\* Mon, 16/05/2022  
 End Date\* Tue, 16/05/2023  
 Plan Start Date\* Mon, 16/05/2022  
 Plan End Date\* Tue, 16/05/2023

Notes

Budgets


Name	Budget	Utilised	Previously Used	Balance
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71
Simpson, Logan - 9308 - Improved Daily Living Skills	5819.70	0.00	0.00	5819.70

Showing 1 to 2 of 2 entries

Click the pen on the budget to alter the line items to match the NDIS plan and ensure funding is split across the consumables, daily activities and social comm access line items to meet the client plan needs.

See below

**Budgets**



Name	Budget	Utilised	Previously Used	Balance
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71
Simpson, Logan - 9308 - Improved Daily Living Skills	5819.70	0.00	0.00	5819.70

Showing 1 to 2 of 2 entries

Manage Budgets

[+ Add Budget](#)

Category	Budget (\$)	Allocated (\$)	Previously Used (\$)	Utilised (\$)	Balance (\$)
Improved Daily Living Skills	5819.70	0.00	0.00	0.00	5819.70
Improved Life Choices	957.06	0.00	0.00	232.35	724.71

Showing 1 to 2 of 2 entries

You can add a line item if it hasn't appeared by clicking the green +Add Budget button on the top right corner of the screen (see above)

When finished, click Save

Then, close

Check that the clients funding has synced to PRODA by managing service booking on the plan management funding screen

Edit Plan Management Plan record

Save Close Funding Statement **Service Bookings** Deactivate Communications Notes Documents Delete + New

On this form: Plan Details Budgets Invoices

**Plan Details**

**Details**

Client\* Simpson, Logan - 9308  
 Funding Source\* NDIS  
 NDIS Number\* 430392409  
 Pricelist\* NDIS JUL-22  
 Price Guide\* NSW, VIC, QLD, ACT

**Plan Dates**

Start Date Mon, 16/05/2022  
 End Date Tue, 16/05/2023  
 Plan Start Date Mon, 16/05/2022  
 Plan End Date Tue, 16/05/2023

**Notes**

Notes

**Budgets**

Name	Budget	Utilised	Previously Used	Balance
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71
Simpson, Logan - 9308 - Improved Daily Living Skills	5819.70		0.00	5819.70

Showing 1 to 2 of 2 entries Previous Next

**Allocated Budgets**

Name	Service Type	Category	Rate	Budget	Utilised	Balance	Plan Management Plan
No data available in table							

Showing 0 to 0 of 0 entries Previous Next

### NDIS Service Bookings

Plan Id	Client	Plan Start Date	Plan End Date
1251645	Simpson, Logan - 9308	16 May 2022	16 May 2023

Resync Brevity Budgets  
 Create Setup Fee Invoice

### Click Resync Brevity Budgets

NDIS Service Bookings

Plan Id	Client	Plan Start Date	Plan End Date
1251645	Simpson, Logan - 9308	16 May 2022	16 May 2023

Resync Brevity Budgets  
 Create Setup Fee Invoice

Success!  
 Budgets synced successfully from NDIS to Brevity

Green success box will appear in top right corner.

Click close

Click save on top left of the screen

Click Close

Now email [allplanmanagement@headwaygippsland.org.au](mailto:allplanmanagement@headwaygippsland.org.au)



---

Subject of email line should be

e.g. Logan Simpson – funding loaded 17/10/20

This is to advise the plan management team that a new plan had arrived and the date of the commencement.