

# 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		
nowing 1 to 1 of 1 entries		Previous N	lext		
1. Click new					
New 🕑 Edit					
/ Plan Management Plan record					
) Close					
n this form: Plan Details Budgets Invoices		>		Ŭ	
Step 1 - Client details					
Client details					
Existing Client / Ves O No					
Client* 🖉 watkinson					



# 2. Enter client name (as above)

se form: Plan Details Budgets Invoices			
٤		\$	
ton 2 - Plan datails			
Details		Service Agreement Start Date	
Details  Funding Source  Pricellar  Price Guide*	D Select	Service Agreement Start Date Start Date @*  V	1605/222

- 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 –

nan wanagement nan record			
Close			
this form: Plan Details Budgets Invoices			
(2)		\$	(\screw)
Stop 2 Plan dataila			
Step 2 - Plan details			
Step 2 - Plan details		Service Agreement Start Date	
Step 2 - Plan details Details	,D NDIS	Service Agreement Start Date	17/10/2022
Step 2 - Plan details Details Funding Source* Pricelar*	,0 NDIS ,0 NDIS JUL-22	Service Agreement Start Date	17/10/2022
Step 2 - Plan details Details Funding Source* Pricelist* Price Guide*	Image: Nois         Image: Nois Jul. 22           NSW, VIC, QLD, ACT	 Service Agreement Start Date	17/10/2022
Step 2 - Plan details Details Funding Source* Pricelist* Price Guide*	NDIS     NDIS JUL-22     NSW, VIC, QLD, ACT	 Service Agreement Start Date	17/10/2022 Back Next



8. Click Next

an Management Plan record					
050					
is form: Plan Details Budgets Invoices					
9				$\checkmark$	
Step 3 - Financial details		NDIS Plan Details			
Charge Setup Fee?"	● Yes ○ No	NDIS Plan Id*	12516	645	
Setup Fee*	232.35	NDIS Plan Start Date*		Mon, 16/05/2022	
Start Date @•	Mon,17/10/2022	NDIS Plan End Date*		Tue, 16/05/2023	
End Date @•	Tue,16/05/2023				
Charge Service Fee?*	● Yes ○ No				
Months*	7				
Service Fee*	104.45				
Service Fee Total*	724.71				
					_
				Back	Mor

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

Plan Management Plan rec	cord		
Close			
this form: Plan Details Budgets Invo	roices		
2			\$ 
Complete			
Saved	Category		Message
	CB_CHOICE_COM	TROL	
	CB_CHOICE_COM	TROL	
Showing 1 to 2 of 2 entries			Previous 1 Ne
			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.			
	Leave	Cancel	

SD – Brevity– Adding Plan management funding – April\_23.docx



### Select Leave

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

Quotes Clients Employees Care Mano	agement Adm	®⊚ inistration	Schedule Board									Q	Q <sup>0</sup> <b>⊑</b> <sup>0</sup> ∓ <sup>0</sup>	McKay, Stephanie
Simpson, Logan - 9308 - NDIS - 0	5/22 to 05/	23										61	Home / Plan Manageme	ent Plan List / Details
iave 🛞 Close						Funding S	itatement 🔒 Ser	vice Bookings	🛇 Deactival	te 🖨 C	Communic	ations 🖉 N	otes 🖹 Documents	🛈 Delete 🛛 + New
this form: Plan Details Budgets Invoices														
Client* D	Simpson, Logan	9308						Start Date @	Mon,	16/05/2022				
Funding Source*	NDIS							End Date @-	Tue.1	16/05/2023				
NDIS Number" 4303	92409							Plan Start Date*	Mon.	16/05/2022				
Pricelist" "O	NDIS JUL-22							Plan End Date	Tue,1	16/05/2023				
Price Guide" NSV	V, VIC, QLD, AC				~	Notes								
								Notes @						d
dgets														â
Budgets	P					Allocated i	Budgets			+				
Name	Budget	Utilised	Previously Used	Balance		Name	Service Type	Category	Rate	Budget	Utilised	Balance	Plan Management Pl	an
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71	0	No data ava	illable in table							
				1040 70										

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

udgets					
Budgets	0				
Name	Budget	Utilised	Previously Used	Balance	
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71	Û
Simpson, Logan - 9308 - Improved Daily Living Skills	5819.70		0.00	5819.70	Û
Showing 1 to 2 of 2 entries					Provious Next

Manage Budgets	-					
						+ Add Budget
Category    Budg	jet (\$)	Allocated (\$)	Previously Used (\$)	Utilised (\$)	Balance (\$)	
D Improved Daily Living Ski	5819.70	0.00	0.00	0.00	5819.70	0
D Improved Life Choices	957.06	0.00	0.00	232.35	724.71	0
Showing 1 to 2 of 2 entries					Pi	revious 1 Next

SD – Brevity– Adding Plan management funding – April\_23.docx



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

ve O Close						Funding Statement	Service Bookings	S Deactivate ⊖	+2 Communications	🖉 Notes 🛛	Documents	Delete +1	New
is form: Plan Details Budgets Invoices							A.						
Details													
etails						Plan Dates							
Cilent*	P Simpson, Logan	- 9308					Start Date @	Mon,16/05/20	22				
Funding Source*	D NDIS				End Date @	Tue, 16/05/20	23						
NDIS Number*	430392409					Plan Start Date	(iii) Mon, 16/05/20	22					
Pricelist*	P NDIS JUL-22						Plan End Date	Tue, 16/05/20	23				
Price Guide*	NSW, VIC, QLD, AC	T			~	Notes							
Price Guide*	NSW, VIC, QLD, AC	т			v	Notes	Notes @						
Price Guide*	NSW, VIC, OLD, AC	т			v	Notes Allocated Budgets	Notes @					Å	
Price Guide" gets Name	NSW, VIC, QLD, AC	T	Previously Used	Balance	v	Notes Allocated Budgets Name Service T	Notes @	+ Rate Budget	Utilised Bala	ance Plan	1 Management P	an	5
Price Guide" gets udgets Name	NSW, VIC, QLD, AC	T Utilised 232 35	Previously Used 0.00	Balance 724.71	v	Notes Allocated Budgets Name Service T Ho data available in tab	Notes @	+ Rate Budget	Utilised Bala	ance Plan	1 Management P	ian .	5
Price Guide" gets udgets Name impson, Logan - 5308 - Improved Life Choices impson, Logan - 5308 - Improved Daily Living S	NSW, VIC, QLD, AC	T Utilised 232.35	Previously Used 0.00 0.00	Balance 724.71 5819.70	v D	Notes Atlocated Budgets Name Service T No data available in hab Showing 0 to 0 of 0 entrief	Notes @ rpe Category s	+ Rate Budget	Utilised Bala	ance Plan	n Management P	lan Previous Ne	5
Price Guide" gets udgets Name Impson, Logan - 5308 - Improved Life Choices Impson, Logan - 5308 - Improved Daily Living S zering 1 to 2 of 2 entries	NSW, VIC, QLD, AC	T Utilised 232.35	Previously Used 0.00 0.00	<b>Balance</b> 724.71 5819.70	v I Previous Next	Notes Allocated Budgets Name Service T No data available in tab Showing 0 to 0 of 0 entrie	Notes @ rpe Category is	+ Rate Budget	Utilised Bala	ance Plan	1 Management P	lan Previous Ne	67

+	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 Invoi	s ce			

## Click Resync Brevity Budgets

NDIS Se	rvice Bookings				
÷	Plan Id 1251645	Client Simpson, Logan - 9308	Plan Start Date 16 May 2022	Plan End Date 16 May 2023	Success! Budgets synced successfully from NDIS to Brevity
Resync Brev Create Setur	ity Budgets Fee Invoice				

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

SD – Brevity– Adding Plan management funding – April\_23.docx



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.