

SD – Brevity - Approving Invoices Plan Management

Minimum information required on an invoice

- Name or NDIS number of service recipient
- Dates of Service
- Type of Service or Line items are required
- Hours of service
- ABN of provider
- Bank details of provider

Once invoices are processed by the Plan Management team they can be found in Brevity under:

- Care Management
- Plan Management Invoices
- Then selecting Awaiting Approval from the drop-down menu

To select an invoice to approve:

Double click on the line that has the Client. Service Provider. Supplier Invoice Date Supplier Invoice Number. Total Amount. Total Hours

Will bring up following screen

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Double click on attached document to bring up invoice

Approver To

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SD – **Brevity** - **Approving Invoices Plan Management**

Check Dates Is the correct date range the same as the invoice

Check Correct Participant

Check Correct Provider

Check Total

If all correct – Select Approve at top right side of the screen Select Save on the left-hand side of the screen

Invoice now approved and you will locate it in Approved Invoices tab

If there are any errors

Use the Comments section to provide feedback Select Save

This will then be dealt with the member of the team that originally processed Their name appears on the far-right hand side of the screen under Awaiting Approval

Errors that can occur

Insufficient funds, Brevity will not allow you to process these, an error will appear across the top of the screen in red.

Plan Management will look at the available funding and move funds across from the categories as required and under NDIS guidelines

Where services have service dates across an old plan and a new plan

Plan Management team will divide the invoice and comment Split Invoice and name Split Invoice A & B Approver to add both totals that have been entered in Brevity and approve both invoices together if total sum is correct If the two totals do not add up to the total of the invoice, then a comment stating this in the comments box Save and this will then sit in awaiting approval to be fixed