

## **SD – Brevity – Support Coordination Reports**

## Brevity how to pull reports For Support Coordination

- 1. Click on clients
  - 2≡
  - Clients

	R≡	225	Ś	9
tes	Clients	Employees	Care Management	Adminis
ß	Clients			
Ŀ	Groups			
	Service			
	Service	Mod		
	Service	2		
	Service	Schedule SIL Te	mplate	
	Service	Calendar		

2. Then highlight over Active Client List, and Click Active Client - SC



3. Once you click on this it will provide you with a list of all Support Coordinated Clients, also who their Key Workers are, you then can Export this Document, by clicking on the top right of your screen Export, this will then generate a .csv file containing the data.





## **SD – Brevity – Support Coordination Reports**

## Brevity how to pull reports For Support Coordination

1. Click on clients, then click on Client funding

	Clients	
N≡	22	$\otimes$
Clients	Employees	Care Manager
Clients		
Groups		
Service	Providers	
Service	Schedule	
Service	Schedule Templ	ate
Service	Schedule SIL Te	mplate
Service	Calendar	
Bulk Em	ail Notifications	
Bulk SM	S Notifications	
Client F	unding	

2. Highlight over Active client funding list and select Active client funding list – SC Allocation



NB: Any filters applied in the view in Brevity will likely not be reflected in the exported .csv file. Excel filter functions will need to be employed. Instructions can be found <u>here</u>.



3. Once you click on this it will provide you with a list of all Clients, you then can Export this Document, by clicking on the top right of your screen Export, this will then generate a .csv file containing the data.

🖓 Filter 🕷	Mail Merge	<li>Import</li>	🗍 Delete	Export	
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4. Once you have downloaded the .csv file, you will then need to filter row 1

	A	В	C	D	E	F	G	H		J	K	L	M	N	0	Р	Q
1	name	startdate 💌	enddate 💌	budget 💌	ndisnumbe 💌	pricelist 🔹	pricelist 🔹	suburb 💌	keywor 🔹	keywor 🔹	funding 🔹	funding 💌	progran 🔻	progran 🔻	invoicet •	invoicet 🔹	primary 🔹

5. Then Filter column N to say SC, this then gives you all Support Coordinated Clients.

