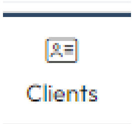
SD – Brevity Checklist for Clients

Adding a Document to the Brevity Checklist

1. To add a document to the brevity checklist, click on the **Clients** tab



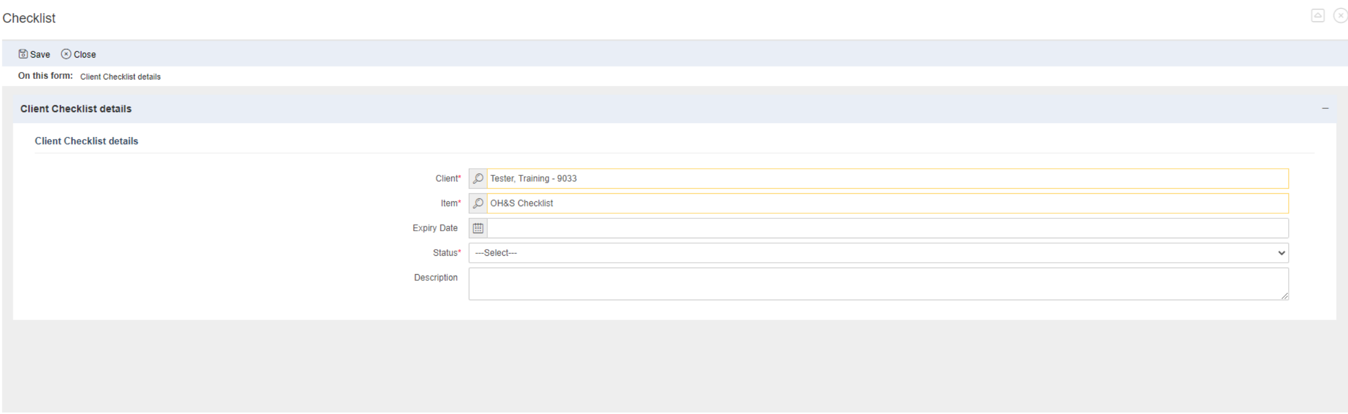
2. Type clients name in search bar

3. Double click on **Client's** name to open their file
4. Double click on the name of document to be added to checklist, to open file

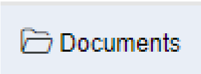
Checklist

Name	Expiry	Present
Service Agreement / Miscellaneous Deed		
Schedule Of Supports		
NDIS Plan / Request for services		
OH&S Checklist		
Support Plan		
Consent Given		

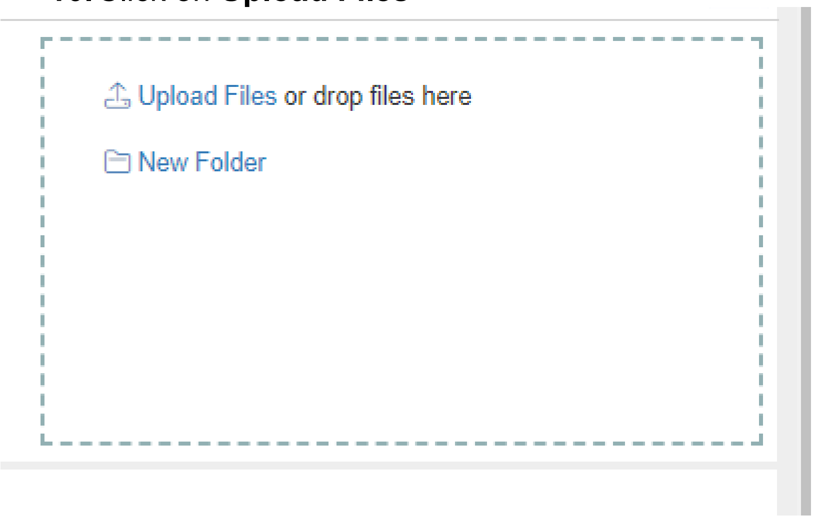
5. Enter an expiry date in expiry date field (this is a year after form was completed for OHS Checklist and NDIS plan end date for all other documents)
6. Change status of document to **<u>Completed</u>** from the drop-down box
7. Write a description of document in description field if required



8. Click on **Save** button in top left of the screen
9. Click on **Documents** button in top right of screen to add the document

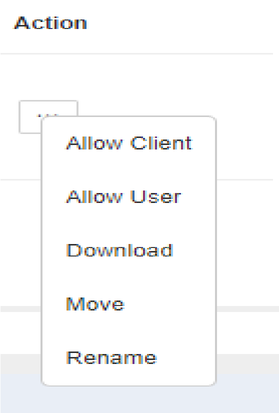


10. Click on **Upload Files**

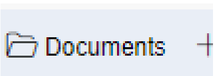


11. Select the file you are uploading, then click **Save** button
12. Click on the **3 dots** (under action)

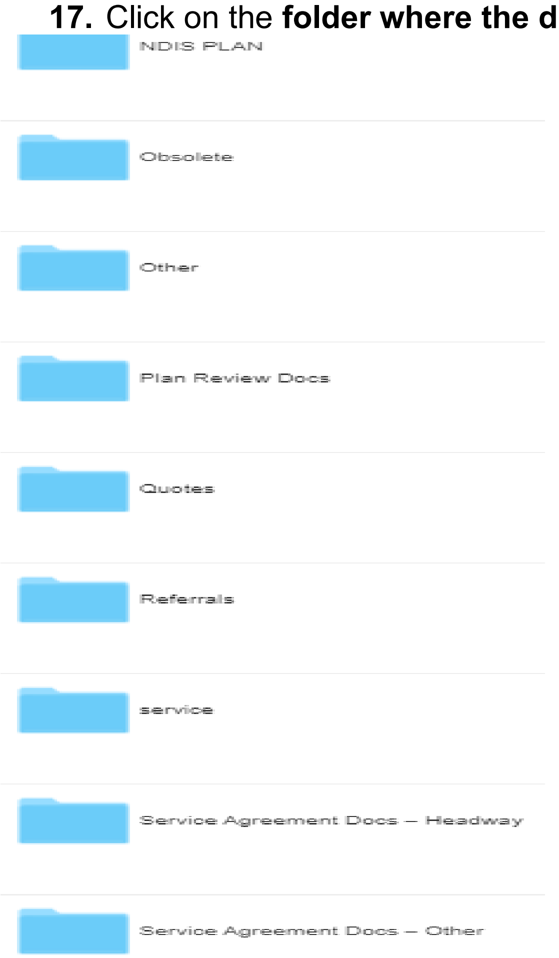
13. Select and click on who is being allowed access to this document



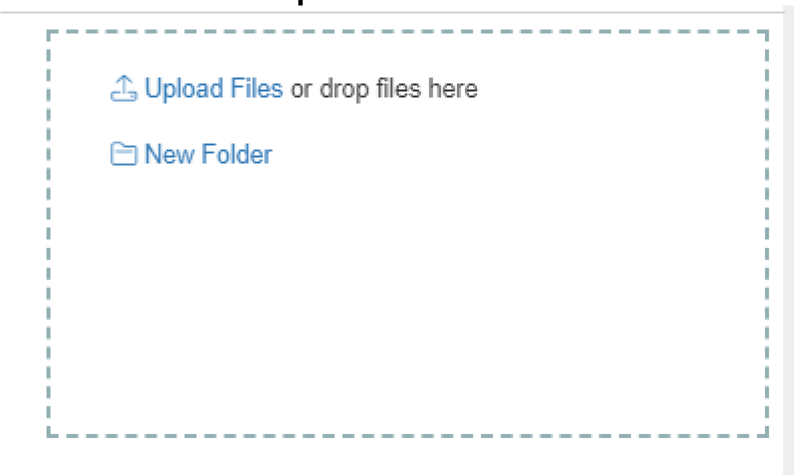
14. Click on **Save** button
15. Close window by clicking on **X** on top right of screen
16. The document also needs to be added under the Documents tab on the clients file, click on **Document** button



17. Click on the **folder where the document is to be uploaded**



18. Click on the **Upload Files Button**



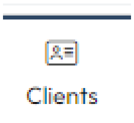
19. Select the file to upload

20. Click on the **Save** button in top left of screen, then the **X** button in the top right of screen to close the screen

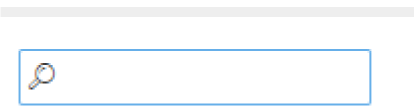
Adding an Uncompleted/Unsigned Document to Brevity Checklist

Documents that have been sent to a client to be signed or to a support coordinator to be completed and signed must also be uploaded to the clients file as unsigned or in-complete while waiting for the signed/completed forms to be returned. Intake is to get verbal consent from the client to start/continue services and this is to be documented in the brevity checklist under consent tab so that services can continue while waiting for the documents to be returned.

1. To add a document to the brevity checklist, click on **Client's** tab



2. Type in clients name in search bar

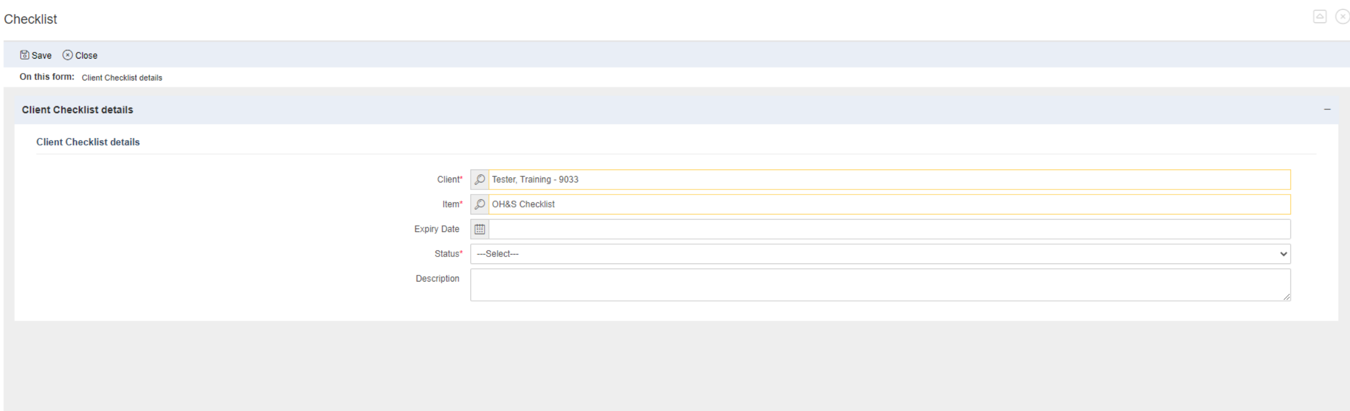


3. Double click on **Client's** name to open their file
4. Double click on the name of document to be added to checklist, to open file

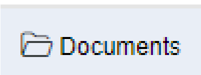
Checklist

Name	Expiry	Present
Service Agreement / Miscellaneous Deed		⊗
Schedule Of Supports		⊗
NDIS Plan / Request for services		⊗
OH&S Checklist		⊗
Support Plan		⊗
Consent Given		⊗

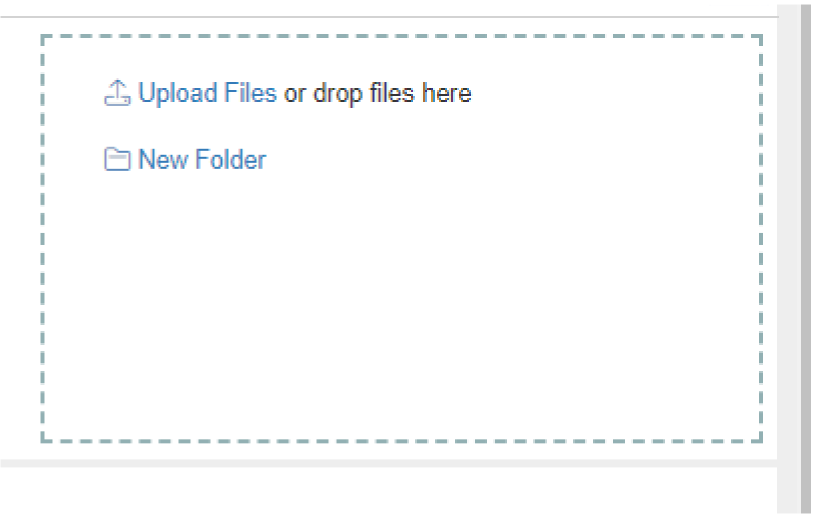
5. Enter an expiry date in expiry date field (this is a year after form was completed for the OHS Checklist and the NDIS plan end date for rest of the documents)
6. Select status of document to **<u>In Progress</u>** from the drop-down box
7. Write a description of document in description field if required



8. Click on **Save** button in top left of the screen
9. Click on **Documents** button in top right of screen

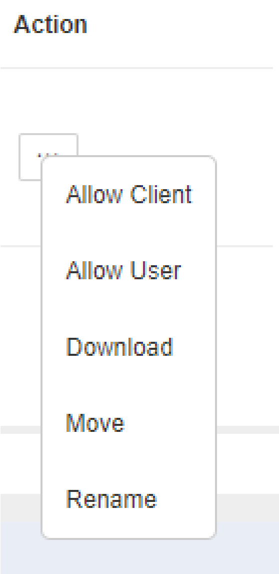


10. Click on **Upload files**



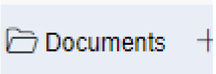
11. Select file you are uploading (ensure the document is named unsigned or in-complete), then click **Save** button
12. Click on the **3 dots** (under action)

13. Select and click on who is being allowed access to this document

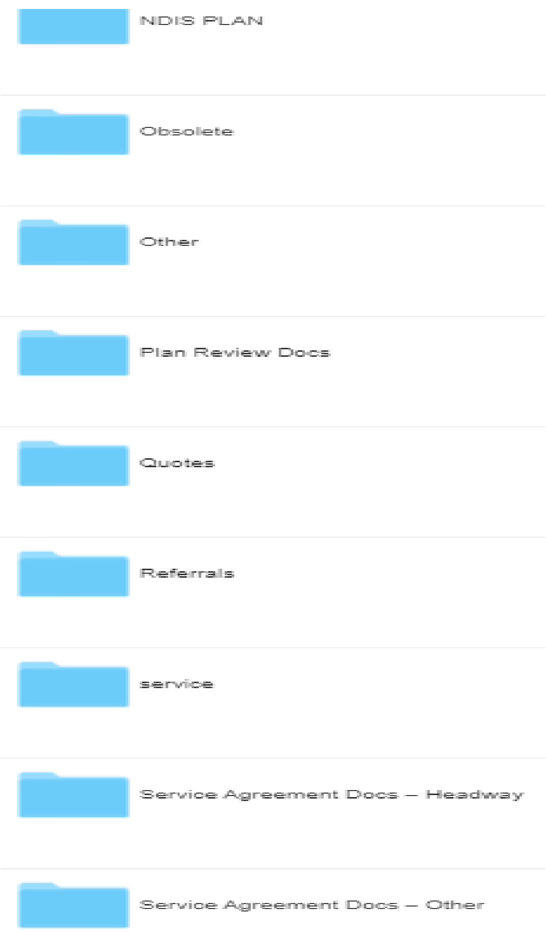


14. Click on **Save** button

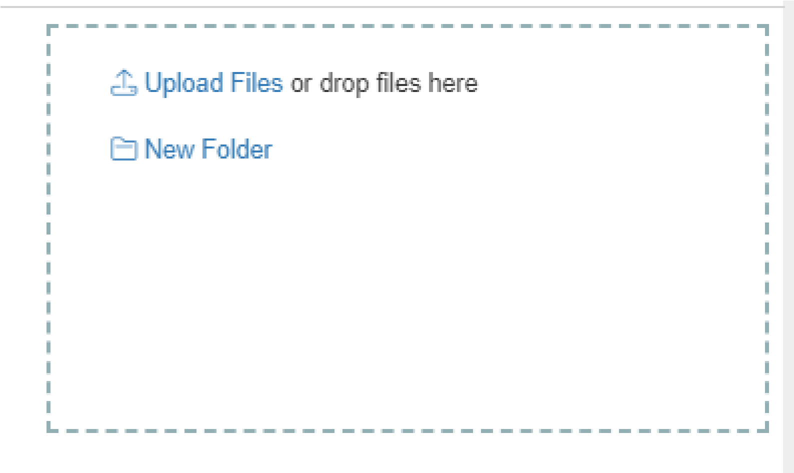
15. Close window by clicking on **X** on top right of screen
16. The document also needs to be added under the **Documents** tab, click on Document button



17. Click on the **folder where the document is to be uploaded**



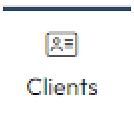
18. Click on the **Upload Files** button (ensure the document is named as unsigned or in complete)



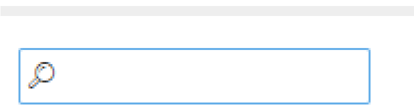
19. Select the file to upload
20. Click on the **Save** button in top left of screen, then the **X** button in the top right of screen to close the screen

Updating a Document on Brevity Checklist

1. To update a document to the brevity checklist, click on **Client's** tab



2. Type in clients name in search bar

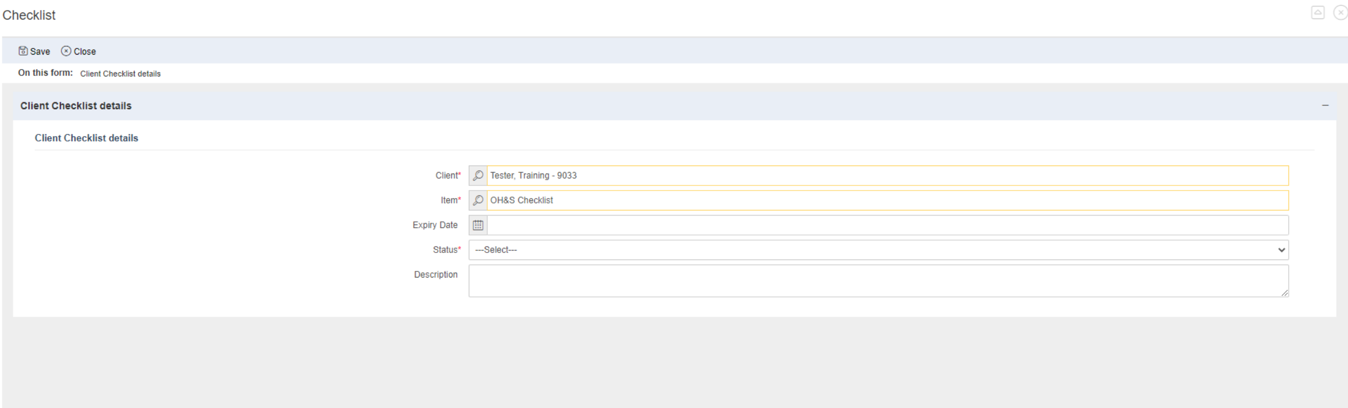


3. Double click on client's name to open their file
4. Double click on the name of document to be added to checklist, to open file

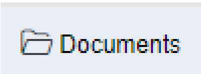
Checklist

Name	Expiry	Present
Service Agreement / Miscellaneous Deed		
Schedule Of Supports		
NDIS Plan / Request for services		
OH&S Checklist		
Support Plan		
Consent Given		

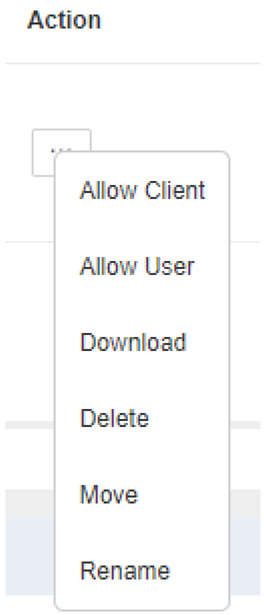
5. Enter an expiry date in expiry date field (this is a year after form was completed for OHS Checklist and the NDIS plan end date for all other documents)
6. Select status of document to **<u>Complete</u>** from the drop-down box
7. Write a description of document in description field if required



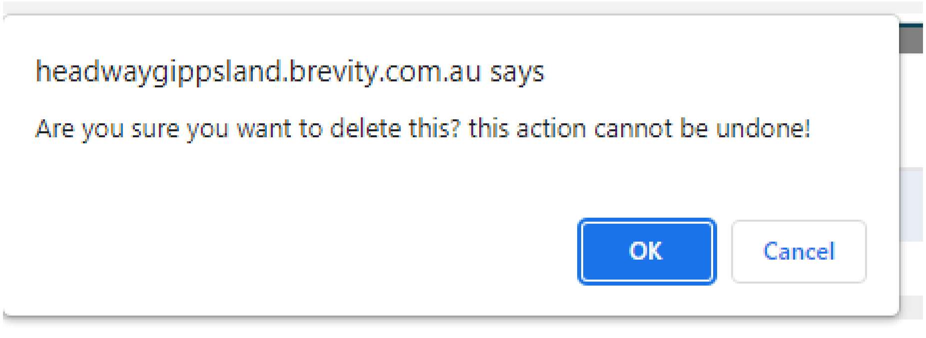
8. Click on **Save** button in top left of the screen
9. Click on **Documents** button in top right of screen



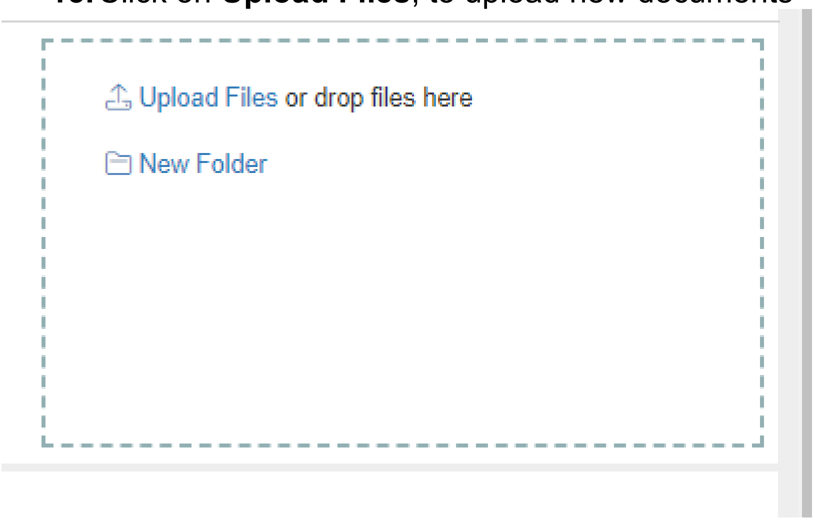
10. Document already in checklist needs to be deleted, click on the 3 dots (under action)



11. Click on **Delete**
12. Click on **OK**

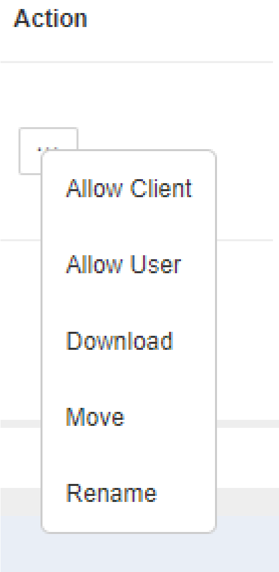


13. Click on **Upload Files**, to upload new documents

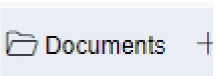


14. Select file you are uploading, then click **Save** button
15. Click on the **3 dots** (under action)

16. Select and click on who allowed to see this document

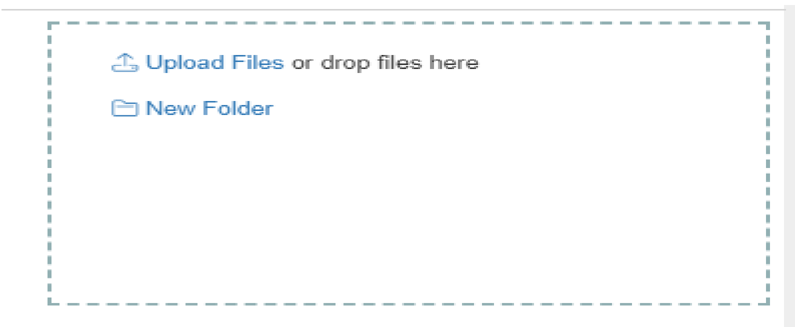


17. Click on **Save** button
18. Close window by clicking on **X** on top right of screen
19. The document also needs to be added under the **Documents** tab, click on **Document** button



20. Click on the **folder where the document is to be uploaded**

21. Click on the **Upload Files** button (ensure the document is named as unsigned or in complete



22. Select the file to upload
23. Click on the **Save** button in top left of screen, then the **X** button in the top right of screen to close the screen