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## SD – Brevity Service Engagement Coordinator - Client Services Schedule

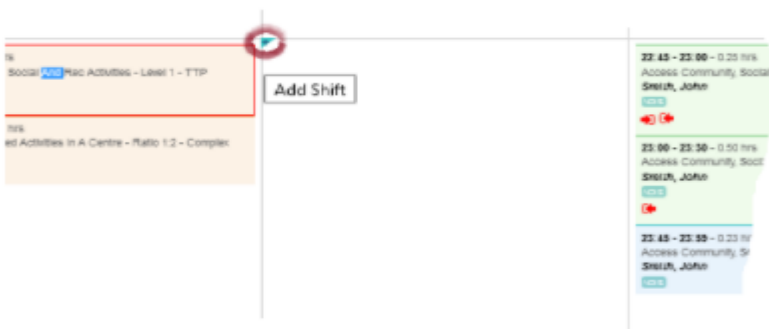
### Content

Adding a shift function via the schedule board .....	2
Editing the service schedule .....	8
Updating the schedule board .....	9
Bulk cancellation of the service schedule .....	10
Changing the time-of-service delivery .....	11
Changing the time-of-service delivery via the service schedule menu .....	11
Changing the time-of-service delivery via the schedule board .....	13
Changing the date of service delivery .....	14
Changing the date of service delivery via the schedule menu .....	14
Changing the date of service delivery via the schedule board .....	16
Changing a life skills officer .....	17
Changing a life skills officer via the service schedule menu .....	17
Assignment .....	17
Removing a life skills officer .....	18
Deleting employee from the service schedule .....	19
Adjusting a life skills officer rostered shift via the schedule board .....	20
Changing the service type .....	23
Adjusting the activity status of a service schedule record .....	25

The Client Service calendar, accessed through the Clients Service Calendar sub-menu is a page within the Brevity web application that displays the clients scheduled services based upon the specification of both a time period as well as optionally the Life Skill Officers (LSO). The scheduled information listed into the page can be both inquired upon through the service schedule page and output to a printer.

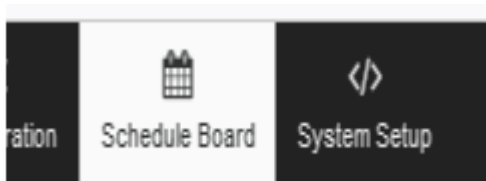
### Adding a shift Function Via the Schedule Board

The Service Schedule record can be accessed from within the schedule board by selecting the **Shift** panel. Service Schedule can be created through the schedule board by selecting the **Add Shift** icon.

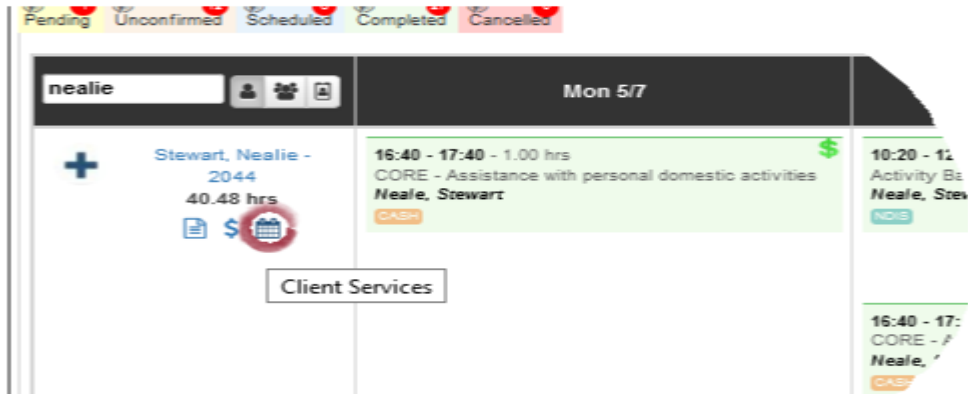


To create a Service Schedule record through the Schedule Board, observe the following steps:

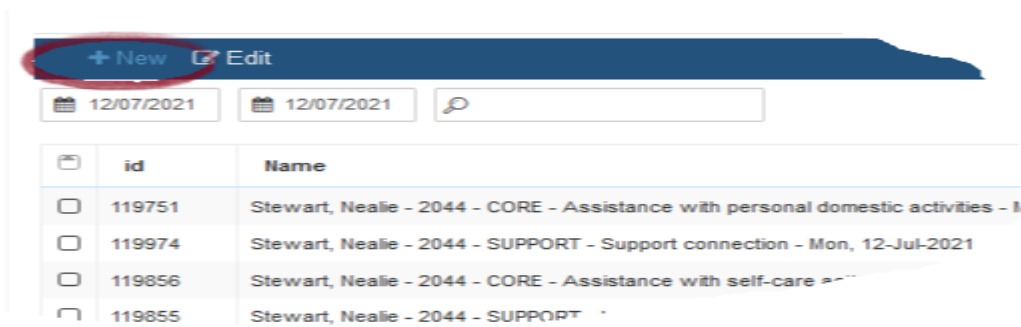
1. Select the **Schedule Board** icon to open the schedule board page.



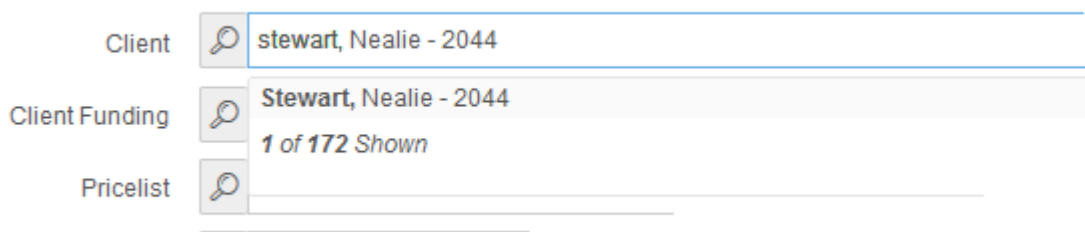
2. Input the name of the client into the filter field to return a list of matching records.



3. Select the **Client Service** icon to open a page that lists the clients service schedules. Select the **+ New** button to open a New Service Schedule record page.



4. Within the Client field position your cursor and either input in free text the client's name or make your selection from the drop-down list.



5. Within the Client Funding field position your cursor and either input in free text the particulars of the funding record or make your selection from the drop-down list.

Client

Client Funding

Pricelist   
1 of 1 Shown

Service Type\*

Upon selection of the funding record the Pricelist field will be updated with the pricelist registered against the selected funding record.

6. Within the Service Type field position your cursor and either input in free text the particulars of the service type or make your selection from the drop-down list.

Service types listed reflect those covered under the selected funding record


Service Type\*

Activity

7. Within the Activity field input a brief narration of the service that will be delivered to the client.

Input is data optional

The narration entered will replace the service description this is by default reflected on the shift panel within the schedule board and through the Brevity Care mobile application.

Stewart, Neale - 2044 25.00 hrs 	7:00 - 8:00 - 1.00 hrs Connecting with local Community Neale, Stewart NDIS	7:00 - 8:00 - 1.00 hrs SUPPORT - Support conne Neale, Stewart NDIS
	8:35 - 10:35 - 2.00 hrs (+35 min) CORE - Assistance with self-care activities	8:35 - 10:35 - 2.00 hrs (+35 min) CORE - Assistance with sr

- 8. Within the Additional Roster Comments field input a brief narration of any additional information that needs to be communicated onto the scheduled service. Input is data optional
- 9. Within the A/H field select from the drop-down list how any afterhours time occurring during the scheduled service will be calculated.

A/H Calculation\*

- Select---
- Shift Start**
- Shift End
- Split Shift

- 10. Within the Billable field identify whether the client will not be billed for the related services. The default assumed is that services will be billed, set the field to 'no' to indicate the service as non-billable.

- 11. Update the Override values.

Override Availability  Yes  No

Override Qualifications  Yes  No

Override Qualifications Reason

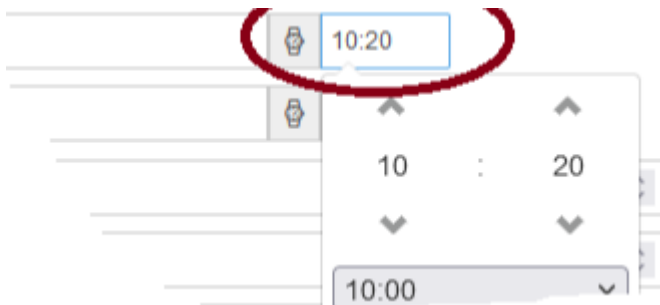
The following inputs and changes are data optional

Setting the Override Availability field value to 'Yes' will override any parameters that influence a support workers availability for service assignment.

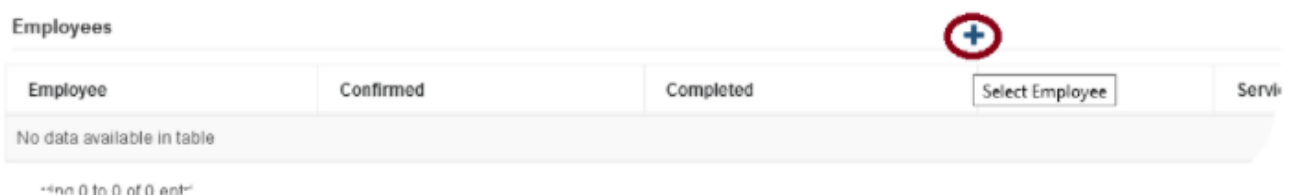
Setting the Override Qualifications field value to 'Yes' will override the qualification requirements assigned to the service type.

Override Qualifications Reason: This field is used to specify a narration as to why the qualification requirement.

- 12. Within the start date field position your cursor and either input in free text the services scheduled start date or make your selection from the date picker.
- 13. Within the Start time field position your cursor and either input in free text the services scheduled start time or make your selection from the time picker. Please note that Brevity defaults the value listed within this field to the current system time.



- 14. Within the End date field position your cursor and either input in free text the service schedule end date or make your selection from the date picker, as shown @ step 12.
- 15. Within the End time field position your cursor and either input in free text the service schedule end time or make your selection from the time picker, as shown @ step 13. Please note that Brevity defaults the value listed within this field to the current system time.
- 16. Update hours panel observe the following optional edits.
- 17. Select the **Save** button to create the Service Schedule record. You will observe the service schedule screen will readjust itself, the service cost will have been calculated, the roster tab is now visible which allows for assignment of a support worker and the assignment of any additional tasks against the service.
- 18. To assign a LSO to the schedule service scroll down to the employee data grid within the Roster tab.



19. Click the **+ Select Employee** icon to open the Select Staff page.
20. Define the search attributes to identify the LSO's available and select the **Search** Button.

You should ensure that you always make best efforts to allocated assigned workers to the service.



Select Staff

Staff Type Client Assigned	Availability Any	Type Employee	Employee Name <input type="text"/>	Gender Any
Travel Distance <input type="text"/>	Job Type Any	Language <input type="text"/>	Qualification Select options	Car Insurance Any

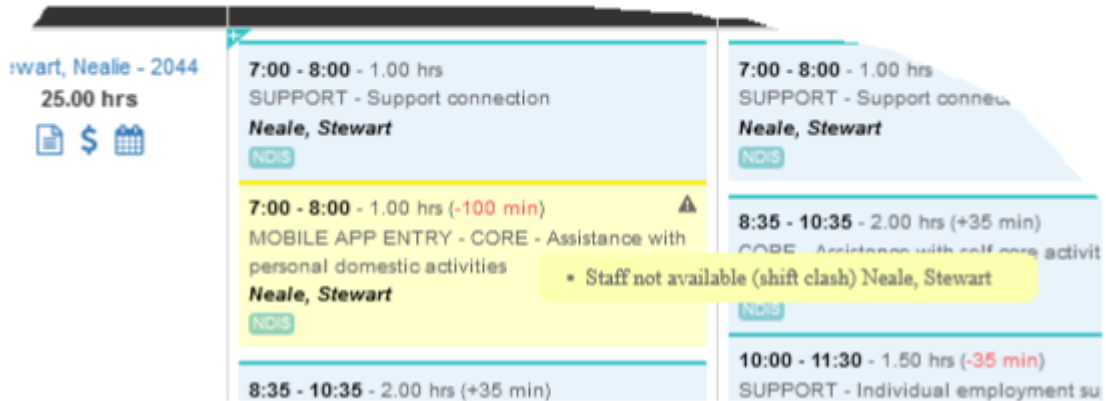
6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
[Blue bar]				[Green bar]	[Green bar]	[Blue bar]	[Blue bar]	[Blue bar]	[Blue bar]	[Blue bar]	[Blue bar]	[Blue bar]

21. From the LSO's listed highlight the one that will be assigned to the schedule service and click the **Select** button to update the Employee data grid with the selected LSO.

Now prior to exiting the service schedule page please observe any scheduling alerts that will be listed at the top of the page. An example of an alert is shown below, as well how it is reflected on the Schedule Board.

## Scheduling Issue

- Staff not available (shift clash) Neale, Stewart



22. Select the **Save** button to update the schedule.

23. Select the **Close** button to exit the page and return the Service Schedule List page.

## Editing the Service Schedule

Editing the Service Schedule can be done through the client panel of the schedule board.

To edit the Service Schedule record, observe the following steps:

1. Select the Client Service Schedule sub-menu to open the Service Schedule List page.
2. Search for the Client name associated with the Service Schedule record from within the Service Schedule List page.

You can utilise the dates to and from fields to narrow your service schedule search.

3. Highlight the service record to be edited and click on the **Edit** button to open it within the Service Schedule page.



Service Schedule List Pending

+ New Edit Bulk Cancel Change Time

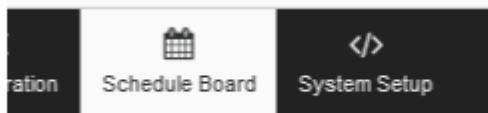
12/07/2021 14/07/2021

<input type="checkbox"/>	id	Name	Status	Service Type
<input checked="" type="checkbox"/>	119751	Stewart, Nealie - 2044 - CORE - Assistance with personal domestic activities - Mon, 12-Jul-2021	Setup	CORE - Assistance with personal
<input type="checkbox"/>	119974	Stewart, Nealie - 2044 - SUPPORT - Support connection - Mon, 12-Jul-2021	Setup	SUPPORT - Support connection

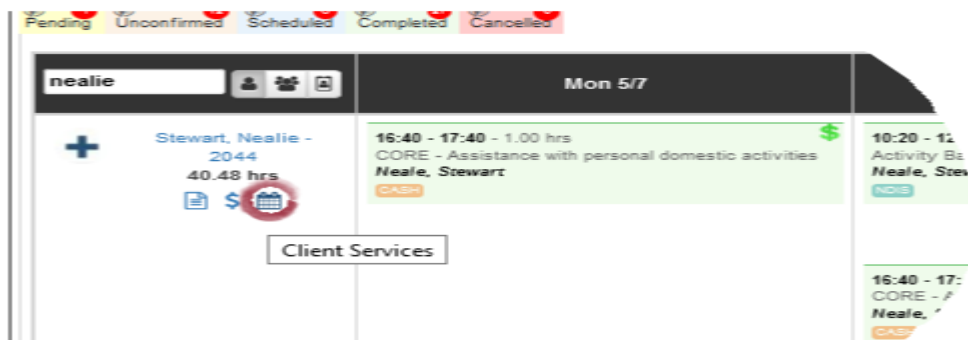
### Updating the Schedule Board

To update a Service Schedule record through the Schedule Board, observe the following steps:

1. Select the **Schedule Board** icon to open the schedule board page.



2. Input the name of the client into the filter field to return a list of matching records.



nealie Mon 5/7

Stewart, Nealie - 2044  
40.48 hrs

16:40 - 17:40 - 1.00 hrs  
CORE - Assistance with personal domestic activities  
Nealie, Stewart

10:20 - 11:20  
Activity Bas  
Nealie, Stev

16:40 - 17:40  
CORE -  
Nealie, S

Client Services

3. Select the **Client Service** icon to open a page that lists the clients service schedules.

You can utilise the dates to and from fields to narrow your service schedule search.

4. Highlight the service record to be edited click on the **Edit** button to open it within the Service Schedule page.



id	Name	Type	Emplo
119751	Stewart, Nealie - 2044 - CORE - Assistance with personal domestic activities - Mon, 12-Jul-2021	Individual	Nealie
119974	Stewart, Nealie - 2044 - SUPPORT - Support connection - Mon, 12-Jul-2021	Individual	
200012	Stewart, Nealie - 2044 - CORE - Assistance with personal domestic activities - Mon, 12-Jul-2021		

### Bulk Cancellation of the Service Schedule

The cancellation of service schedule record can be done through the **Client Panel** on the schedule board. It is to be observed that you can only cancel service schedules that are either scheduled, pending, available or awaiting confirmation.

To cancel an individual or multiple of client Service Schedule records through the Schedule Board you can adopt one of two approaches which is either through the client panel or utilising the cancel service schedule function. For both these approaches observe the following steps:

1. Select the **Schedule Board** icon to open the schedule board page
2. Input the name of the client into the filter field to return a list of matching records.



3. Scroll through to the required day within the schedule board highlight the client schedule(s) to be cancelled and select **Cancel Selected Shift** icon (located at the lower right of the schedule board).



## Changing the Time-of-Service Delivery

There are three approaches that can be taken with the adjustment of the start and end times on a service schedule record and they are **1** through the **Service Schedule sub-menu** and **2** either through the **Client Panel** or the **Change Shift Time** function on the schedule board. It is to be observed that you can only adjust the start and ends times on service schedules that are either scheduled, pending, available or awaiting confirmation.

## Changing the Time-of-Service Delivery via the Service Schedule Menu

To change the time associated with either an individual or multiple of client Service Schedule records observe the following steps:

1. Select the Client **Service Schedule** sub-menu to open the Service Schedule List page.
2. Search for the Client name associated with the Service Schedule record from within the Service Schedule List page that will be subject to a change of service time.

You can utilise the dates to and from fields to narrow your service schedule search.

- Highlight the service record that will be reassigned either an adjusted start or end date. To select multiple service schedules, hold down the **CTRL** button on the and select the Service Schedule records listed within the data grid.

20/07/2021 23/07/2021 neale

id	Name	Status	Service Type	Employees	Weekday
120292	Stewart, Neale - 2044 - CORE - Assistance with self-care activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with self-care activities	Adamia, Mack	Wed
120295	Stewart, Neale - 2044 - SUPPORT - Individual employment support - Wed, 21-Jul-2021	Setup	SUPPORT - Individual employment support	Anoma, Mui	Wed
120291	Stewart, Neale - 2044 - CORE - Assistance with personal domestic activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with personal domestic activities	Neale, Stewart	Wed
120292	Stewart, Neale - 2044 - CORE - Assistance with self-care activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with self-care activities	Adamia, Mack	Tue

- Select the **Change Time** button located within the ribbon bar to open the Select new Start and End times page.

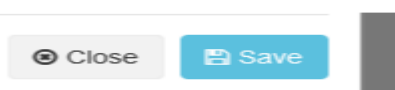


Please note that if you select multiple service schedules that have different service start/end times you will be alerted with the following message. Select **Ok** to close the pop-up screen and reselect the required services. If you proceed any changes made will be applied to the selected services regardless of the service start/end times.

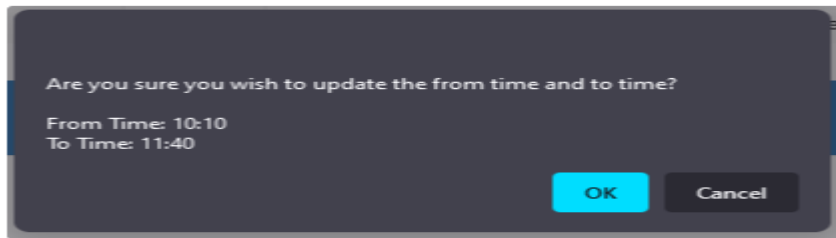
- Apply your edits to the start and end dates within the Select new Start and End times page by over-typing the times that are listed.

Note that the start and end times listed are based upon the start and end times listed within the service schedule.

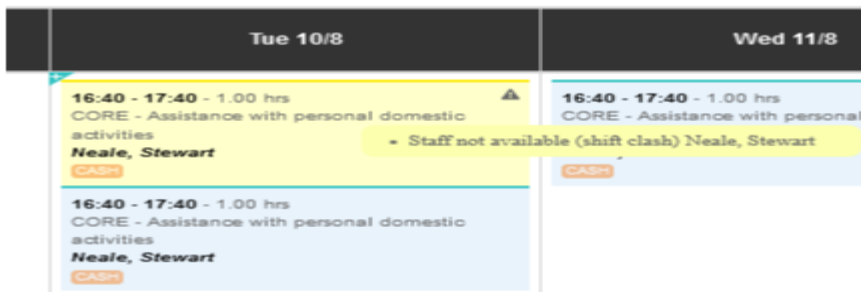
Select the **Save** button



- You will be presented with a pop-up screen, select the **Ok** button to confirm the changes to the service times.



Please note that adjusting the time of client’s service schedule can result in service clashes, which will be presented in the Schedule Board as shown as follows



### Changing the Time-of-Service Delivery via the Schedule Board

To adjust the time of a Service Schedule record through the Schedule Board you can adopt one of two approaches which is either through the client panel or utilising the change shift time function. For both these approaches observe the following steps:

1. Select the **Schedule Board** icon to open the schedule board page.
2. Input the name of the client into the filter field to return a list of matching records.



3. Scroll through to the required day within the schedule board highlight the client schedule(s) to be amended and select the change schedule time Change Shift Start or End time icon (located at the lower right of the schedule board) to open the Select new

Start and End times page and observe the steps already outlined for adjusting the scheduled start and end times.



## Changing the Date of Service Delivery

There are three approaches that can be taken with the adjustment of the service schedule delivery date and they are **1** through the Service Schedule sub-menu and **2** either through the client panel or the Change Day function on the schedule board. It is to be observed that you can only adjust the date on service schedules that are either scheduled, pending, available or awaiting confirmation.

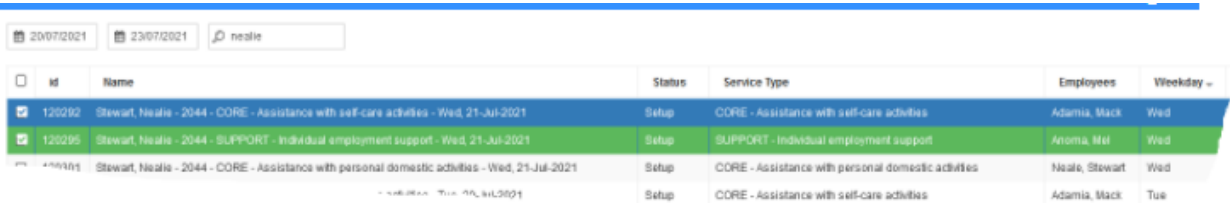
### Changing the Date of Service Delivery via the Schedule Menu

To change the day associated with either an individual or multiple of client Service Schedule records observe the following steps:

1. Select the Client **Service Schedule** sub-menu to open the Service Schedule List page.
2. Search for the Client name associated with the Service Schedule record from within the Service Schedule List page that will be subject to a service date update.

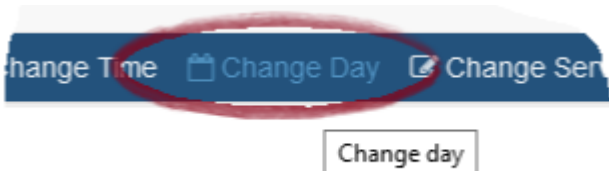
You can utilise the dates to and from fields to narrow your service schedule search.

- Highlight the service record that will be assigned a new service date. To select multiple service schedules, hold down the **CTRL** button on the and select the Service Schedule records listed within the data grid.



ID	Name	Status	Service Type	Employees	Weekday
120290	Stewart, Neale - 2044 - CORE - Assistance with self-care activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with self-care activities	Adams, Mack	Wed
120295	Stewart, Neale - 2044 - SUPPORT - Individual employment support - Wed, 21-Jul-2021	Setup	SUPPORT - Individual employment support	Anoma, Mel	Wed
	Stewart, Neale - 2044 - CORE - Assistance with personal domestic activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with personal domestic activities	Neale, Stewart	Wed
		Setup	CORE - Assistance with self-care activities	Adams, Mack	Tue

- Select the **Change Day** button located within the ribbon bar to open the Select Date page.



- Within the Select Days page click into the drop-down list and select the number of days that client service will be moved by.

Service schedules can be moved back by maximum of 14 days, to move the service back utilise the days values preceded with a -

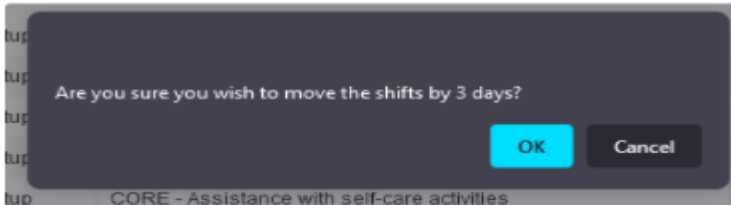
Service schedules can be moved forward by maximum of 14 days, to move the service forward utilise the days values preceded with a +



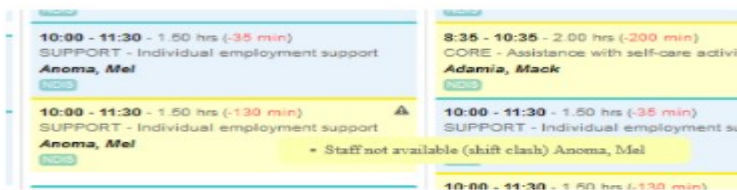
Select the Save button



- You will be presented with a pop-up screen, select the **Ok** button to confirm the change to the service date.



Please note that adjusting the date of client’s service schedule can result in service clashes, which will be presented in the Schedule Board as shown as follows



### Changing the Date of Service Delivery via the Schedule Board

To adjust the date of a Service Schedule record through the Schedule Board you can adopt one of two approaches which is either through the client panel or utilising the Change Day function. For both these approaches observe the following steps:

- Select the **Schedule Board** icon to open the schedule board page.
- Input the name of the client into the filter field to return a list of matching records.





3. Scroll through to the required day within the schedule board highlight the client schedule(s) to be amended and select the change date **Change Day** icon (located at the lower right of the schedule board) to open the Select Days page and observe the steps already outlined for adjusting the date of clients scheduled service.



## Changing a Life Skills Officer

Changing an LSO can be done through the **Client Panel** or the **Switch Worker** function on the schedule board. It is to be observed that you can only adjust an LSO on service schedules that are either scheduled, pending, available or awaiting confirmation.

You are to observe that this function also allows for the Removal of LSO from either an individual or multiple of client Service Schedule records. Details are provided below on how that activity is undertaken.

## Changing a Life Skills Officer via the Service Schedule Menu

To change the LSO associated with either an individual or multiple of client Service Schedule records observe the following steps:

1. Select the Client **Service Schedule** sub-menu to open the Service Schedule List page.

2. Search for the Client name associated with the Service Schedule records from within the Service Schedule List page that will be subject to update of the LSO.
3. Highlight the service record that will be assigned a new service date. To select multiple service schedules, hold down the **CTRL** button on the and select the Service Schedule records listed within the data grid.

20/07/2021 23/07/2021 neale

ID	Name	Status	Service Type	Employees	Weekday
122292	Stewart, Neale - 2044 - CORE - Assistance with self-care activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with self-care activities	Adamia, Mack	Wed
122295	Stewart, Neale - 2044 - SUPPORT - Individual employment support - Wed, 21-Jul-2021	Setup	SUPPORT - Individual employment support	Anomia, Mel	Wed
122296	Stewart, Neale - 2044 - CORE - Assistance with personal domestic activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with personal domestic activities	Neale, Stewart	Wed
122297	Stewart, Neale - 2044 - CORE - Assistance with self-care activities - Wed, 21-Jul-2021	Setup	CORE - Assistance with self-care activities	Adamia, Mack	Tue

4. Select the **Switch Worker** button located within the ribbon bar to open the Select Employee to Assign Shifts to page

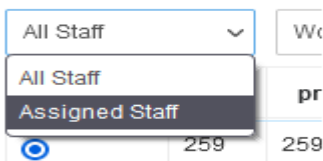


5. Within the Select Employee to Assign Shifts to page you can either select and reassign the service to another LSO or remove the life skills officer from the service and leave it unassigned.

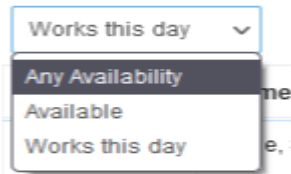
## Assignment

To either assign (if the service does not have a LSO rostered) or reassign a different LSO

(1) Within the Staff field, position the cursor and select the required value from the drop-down list, the value selected will influence the staffing names listed within the data grid.



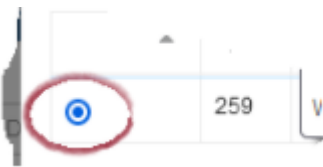
(2) Within the availability field, position the cursor and select the required value from the drop-down list, the value selected will influence the staffing names listed within the data grid.



(3) Within the search field, specify either the partial or full name of the support, the value selected will influence the staffing names listed within the data grid.



(4) From the staffing names listed, within the data grid select the record that will be rostered to one or more client services.

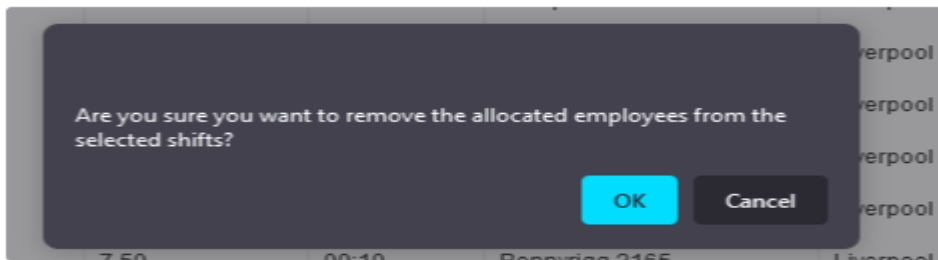


### Removing a Life Skills Officer

To remove a rostered LSO from the client's service, select the **Remove Employees** button to be presented with a pop-up alert.



Select **Ok** to confirm the removal of the LSO and to exit the Select Employee to Assign Shifts to page.



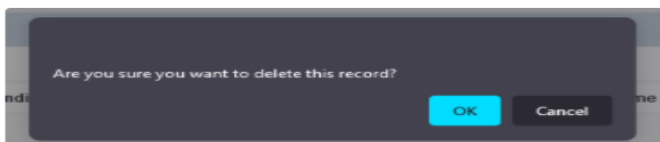
- To complete the assignment of a LSO, click the **Select** button to update the rostering information on the client's service schedule and exit from the Select Employee to Assign Shifts to page.

### Deleting Employee from the Service Schedule

A rostered staff member can be removed directly from the client's service schedule record.

To undertake this activity search for the service schedule within the Service Schedule List select the **Edit** button to open the service schedule page. Scroll the page down to the Rostering tab and within the Employee data grid select the **Delete Record** icon. To confirm the removal of the record, select the **Ok** button.

Employee	Confirmed	Completed	Hours	Service Total	Expense Total	Total Amount	
Schtape, Scott	Yes	Yes	2.00	79.92	0.00	79.92	    



### Adjusting a Life Skills Officer Rostered Shift via the Schedule Board

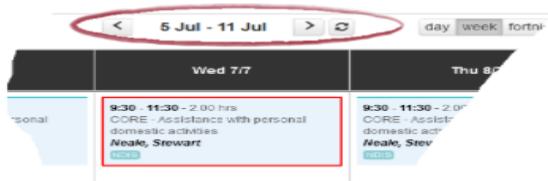
To adjust the LSO that has been rostered to the Service Schedule record through the Schedule Board you can adopt one of two approaches which is either through the client panel or utilising the **Switch Worker** function. For both these approaches observe the following steps:

- Select the **Schedule Board** icon to open the schedule board page.

- Input the name of the client into the filter field to return a list of matching records.

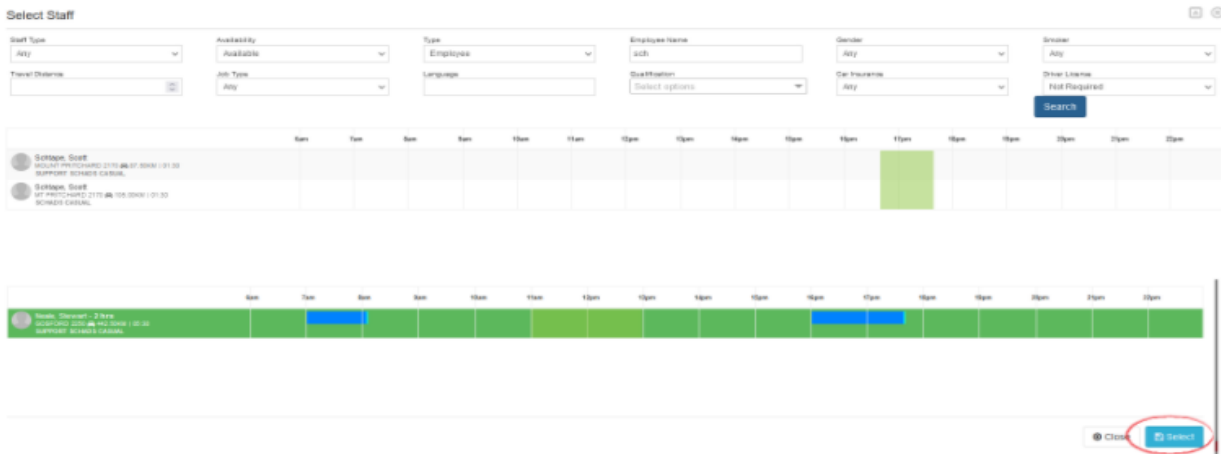


- Scroll through to the required day within the schedule board highlight the client schedule(s) to be amended and select the **Switch Worker** icon (located at the lower right of the schedule board) to open the Select Staff page, Steps for interacting with this page are outlined below.



Updating the rostering information on the client's service schedule is undertaken through the Select Staff page. This page provides you with a number of different parameters that assists you to filter and search for LSO's that are either most suitably qualified or have availability for allocation to the service.

Once the parameters have been specified, click the **Search** Button to return a listing of matching LSO records. Review any periods of scheduling, highlight the required record from the data grid and click the **Select** button to update the clients service schedule.



The screenshot shows the 'Select Staff' interface with various search filters and a scheduling grid. The filters include Staff Type, Availability, Type, Employee Name, Gender, Address, Travel Distance, Job Type, Language, Qualification, Car Insurance, and Driver License. A 'Search' button is located at the bottom right of the filter section. Below the filters is a scheduling grid with columns for days of the week and time slots. A green bar represents a staff member's availability, and a blue bar indicates a period of unavailability. The 'Select' button at the bottom right is circled in red.

The following is a brief summary of the search attribute fields within the Select Staff page. Either inputting a keyed value or selecting a coded value will influence the staffing names listed within the scheduling data grid upon select of the **Search** button.

The scheduling data grid list your LSO's periods of unavailability, these periods are denoted in blue, selecting the period provides a pop up that lists a summary of the particulars of the service delivery (*service name and service time*).



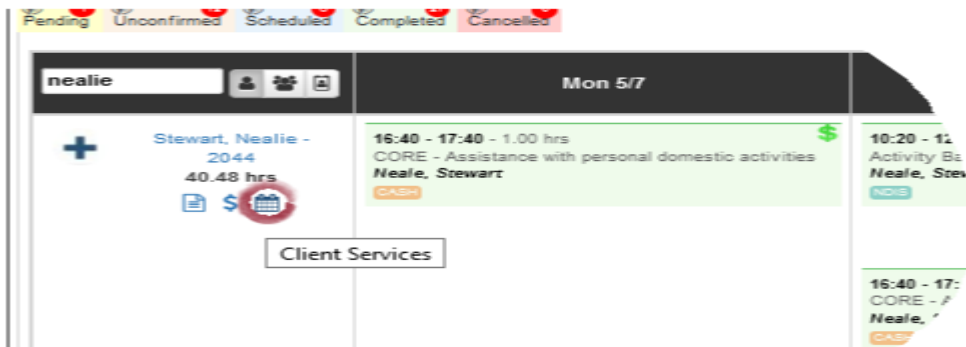
The screenshot shows a scheduling grid with a pop-up window. The pop-up window displays the following information: 'Stewart, Nealie - 2044 - 7:05 - 8:05 - 1.00 hrs' and 'SUPPORT - Support connection'. Below the pop-up, a blue bar on the grid is circled in red, indicating the selected period of unavailability. The grid also shows other staff members: 'Neale, Stewart - 2 hrs' and 'Itician, Paul'.

## Changing the Service Type

The approach that can be taken with changing the service type on the client's service schedule. This activity can only be undertaken through the client panel on the schedule board. It is to be observed that you can only adjust the service types on schedules that are either scheduled, pending, available or awaiting confirmation.

To update a Service Schedule record with a revised service type through the Schedule Board observe the following steps:

1. Select the **Schedule Board** icon to open the schedule board page.
2. Input the name of the client into the filter field to return a list of matching records.



3. Select the **Client Service** icon to open a page that lists the clients service schedules.

You can utilise the dates to and from fields to narrow your service schedule search.

4. Highlight the service record(s) to be updated.

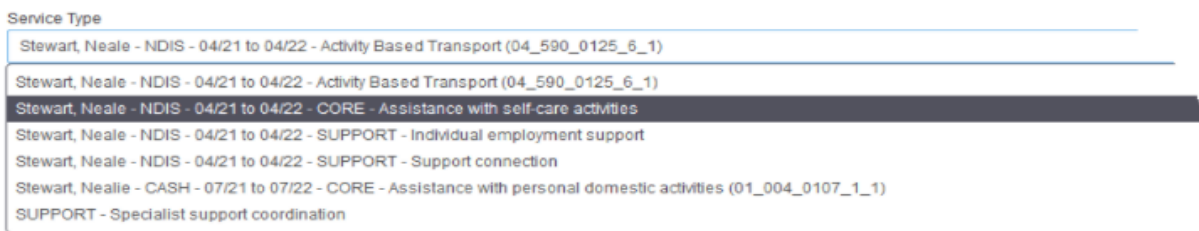
ID	Name	Type	Employee	Status	Weekday	Start Day	Time
120031	Stewart, Nealie - 2044 - CORE - Assistance with personal domestic activities - Tue, 27-Jul-2021	Individual	Neale, Stewart	Scheduled	Tue	27-07-2021	16:40 - 17:40
120032	Stewart, Nealie - 2044 - CORE - Assistance with personal domestic activities - Wed, 28-Jul-2021	Individual	Neale, Stewart	Scheduled	Wed	28-07-2021	16:40 - 17:40
119901	Stewart, Nealie - 2044 - CORE - Assistance with self-care activities - Tue, 27-Jul-2021	Individual	Adama Mack	Scheduled	Tue	27-07-2021	10:20 - 11:20
	Stewart, Nealie - 2044 - CORE - Assistance with self-care activities - Wed, 28-Jul-2021	Individual	Adama Mack	Scheduled	Wed	28-07-2021	10:20 - 11:20

5. Select the **Change Service Type** button to open the Select a New Service Type for selected Shifts page.

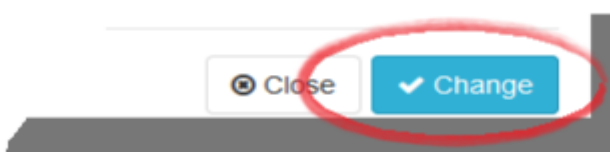


6. Within the Service type field position our cursor in the drop-down list and select the required service type value that the clients service will be updated with.

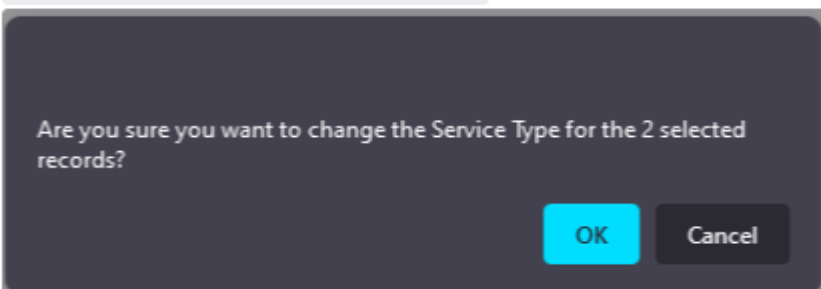
It is important to observe that where the client has multiple published funding records, the service types associated with those funding records will be listed.



Select the **Change** button.



Select OK to confirm the change





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## Adjust the Activity Status of a Service Schedule Record

Under this topic we will outline the deactivation of the Service Schedule record through the Service Schedule sub-menu. To Adjust the activity status of a service schedule record, observe the following steps:

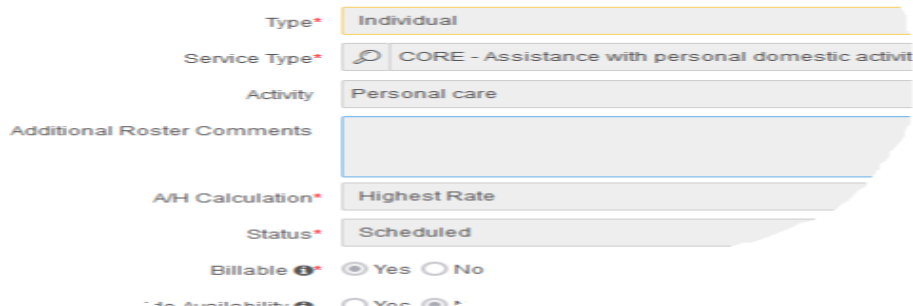
1. Select the **Client Service Schedule** sub-menu to open the Service Schedule List page.
2. Search for the Client name associated with the Service Schedule record from within the Service Schedule List page that will be have its activity status updated.

You can utilise the dates to and from fields to narrow your service schedule search.

3. Highlight the service record that will be updated with tasking record click on the **Edit** button to open it within the Service Schedule page.
4. To deactivate the Service Schedule record, select the **Deactivate** button.

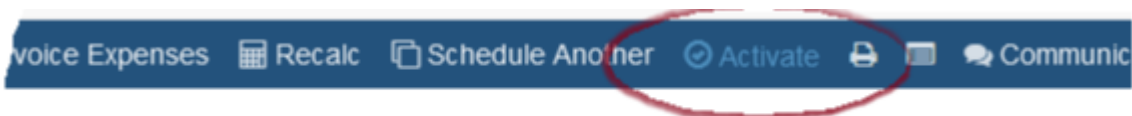


### Service Schedule details



A screenshot of a 'Service Schedule details' form. The fields and their values are: Type\* (Individual), Service Type\* (CORE - Assistance with personal domestic activit), Activity (Personal care), Additional Roster Comments (empty text area), AH Calculation\* (Highest Rate), Status\* (Scheduled), Billable\* (Yes selected), and Life Availability\* (Yes selected).

5. To activate the Service Schedule record, select the **Activate** button.



6. Once done, select the **Close** button to exit the form