SD – Brevity Service Engagement Coordinator - Service Schedule Template – For New Clients

Content

The Service Schedule Template module is related with the provision of direct services. The record is comprised of two elements, firstly the Template profile and secondly the service item profile.

The Template profile that identifies the participant's name, the template type (either group or individual) and the service items associated with the template.

The service item profile, lists the individual services that are being delivered under agreement, the service type, recurrence of and time of service delivery, source and pricelist, the employee allocated to deliver the services, travel and transport considerations.

Creating a Service Schedule Template

Creating a service schedule template is completed through the **Service Template** icon located on the client panel within the schedule board.

To create a service schedule template record, observe the following steps:

1. Select the **Service Template** icon located on the client panel within the schedule board.

2. Select the ⊕New button to open the page New Service Schedule Template record page.

Service Templates

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3. From the Type field either accept the default of Individual or click in the field and select Group from the drop-down list. Selecting Group will hide the client field and make visible the name field.

4. Select the **Save** button to create the Service Schedule Template and make visible the items data grid.

5. Select the ⊕**Add New Record** icon located above the Items data grid to open the New Service Schedule Template Item record page.

Items
⊕

Name	Service Type	Employee	Recurring Type	Start Time	End Add new record otal Hours	Monday	Tuesuay
No data available in table							

6. Within the Source field position your cursor and either input in free text the funding source code or make your selection from the drop-down list.

You will observe that the funding source is a concatenation of the Participants name, the funding source and the dates of the funding agreement. This information is read from the client funding record. Multiple published funding source codes can be returned for the participant.

The selection of the funding source will programmatically update the Pricelist field with the pricelist code matching to the pricelist retained against the Client Funding record.

7. The Pricelist code listed within the Pricelist field will be updated based upon the pricelist retained against the client funding selected within the funding source field.

8. Within the Service Type field position your cursor and either input in free text the Service Type or make your selection from the drop-down list.


9. Within the A/H field select from the drop-down list how any afterhours time occurring during the scheduled service will be calculated.

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. Within the Employee field position your cursor and either input in free text the Employee or make your selection from the drop-down list.
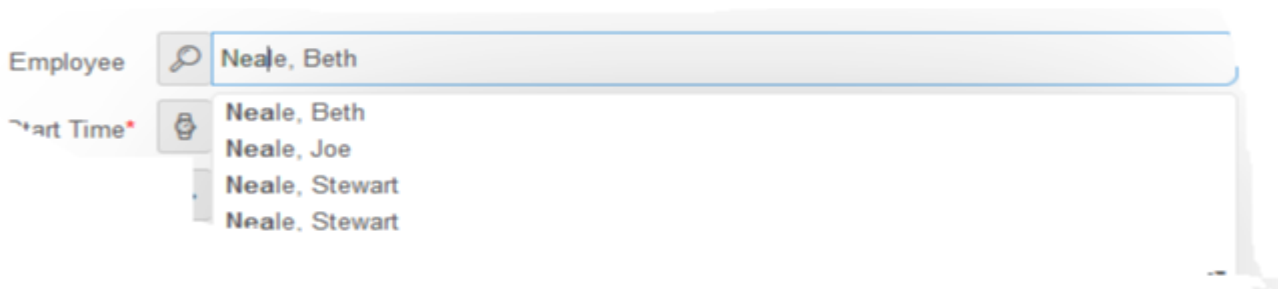
12. Within the Start time field position your cursor and either input in free text the services scheduled start time or make your selection from the time picker.
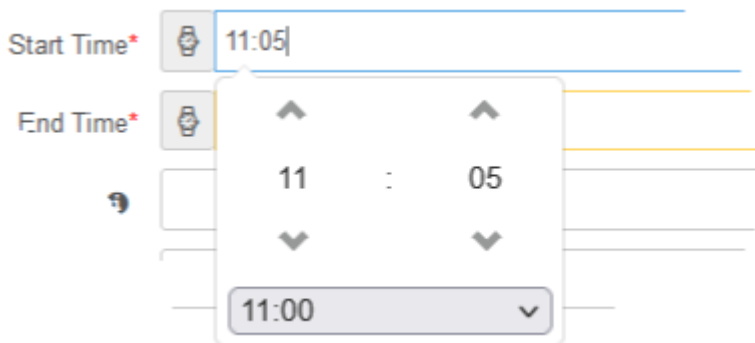

13. Within the End time field position your cursor and either input in free text the service schedule end time or make your selection from the time picker.

14. Within the Break hours field input the approved allocation for a meal break.

15. Validate that the service hours presented within the Total Hours field have been calculated correctly by Brevity.

16. Within the Activity field input a brief narration of the service that will be delivered to the participant. 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.
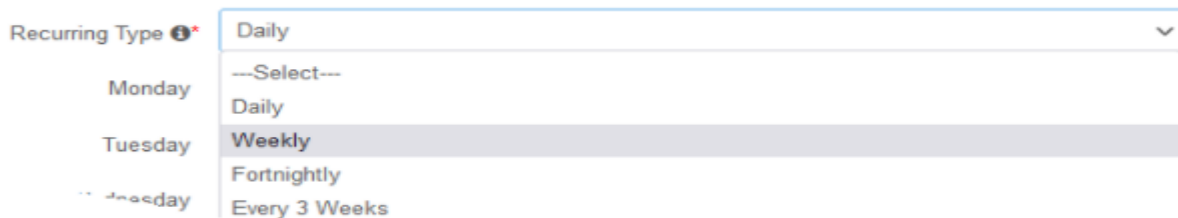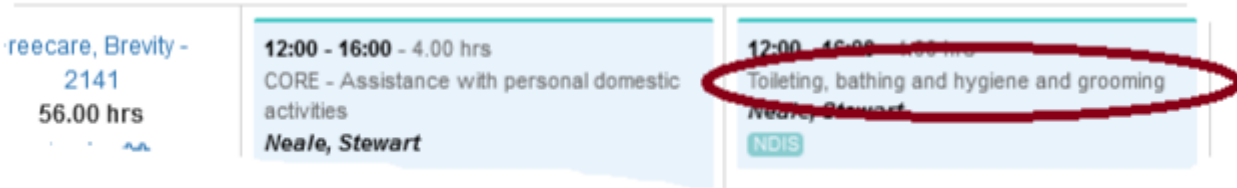
17. Within the Additional Roster Comments field input a brief narration of any additional information that needs to be communicated onto the scheduled service.

18. Under the Travel and Transport panel observe the following optional edits:

- Where the Address for Service is different to the Client Address you will need to specify the address at where the Life Skills Officer will be clocking on and off at within the Address Start and Address End fields.

- Update the Pay Travel Mileage field to 'yes' if travel mileage is to be paid in relation to the service. Update the Pay Travel Time field to 'yes' if travel time is to be paid in relation to the service.

- Within the Charge Travel to Client field update the default and select yes' if the client is to be charged. Select the preferred approach either adding travel time to the service hours pr invoicing separately. Selecting yes allows you to optionally specify calculation parameters.

- Within the Transport Distance and Transport Distance Rate fields you can specify parameters that regulate the distance that the support worker travels during the scheduled service.

- Within the Transport Client Funding Code field position your cursor and select from the drop down list the service item set against the clients funding record that the transport costs will be claimed against
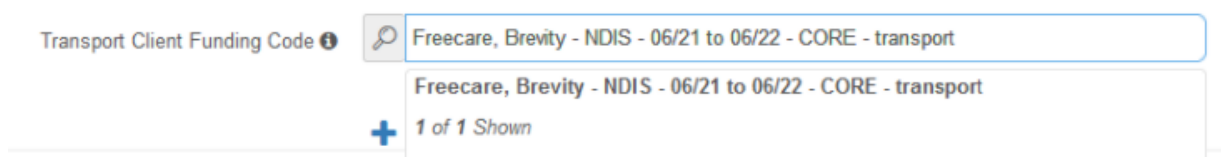
19. Within the Recurring Type field select from the drop down list the recurrence type that will be used to determine the frequency that the service will be delivered on.

20. Set the days that the service will be delivered upon.

Where the recurring type value is set to daily the fields Monday through to Friday will be disabled and set as 'yes', you do have the option to mark whether service delivery will be occurring on a weekend

For the remaining recurrence types of weekly, fortnightly, every 3 and 4 weeks and monthly you have the flexibility to select what days from Monday through to Sunday will be set for delivery of the service to the client.

21. Select the **Save** button to create the Service Schedule Template Item record.
22. Select the **Close** button to exist the page back to the Service Schedule Template.

Editing a Schedule Template Record

Editing a schedule template record can be done through the **Service Template** icon located on the client panel within the schedule board.

Update a Service Schedule

Updating service schedules can be done through the **Service Template** icon located on the client panel within the schedule board.

Creating a Service Schedule

Creating a service schedule from the **Service Template** icon located on the client panel within the schedule board.

The information listed within this topic relates only with creating a service schedule via the Service Schedule Template menu. To create a service schedule from a Service Schedule Template, observe the following steps:

1. Select the **Service Template** icon located on the client panel within the schedule board
2. Highlight the template record to be edited click on the **Edit** button to open it within the Service Schedule Template page.
3. Select the **Create Service Schedule** button located with the ribbon bar to open the Create Service Schedule from Template page.
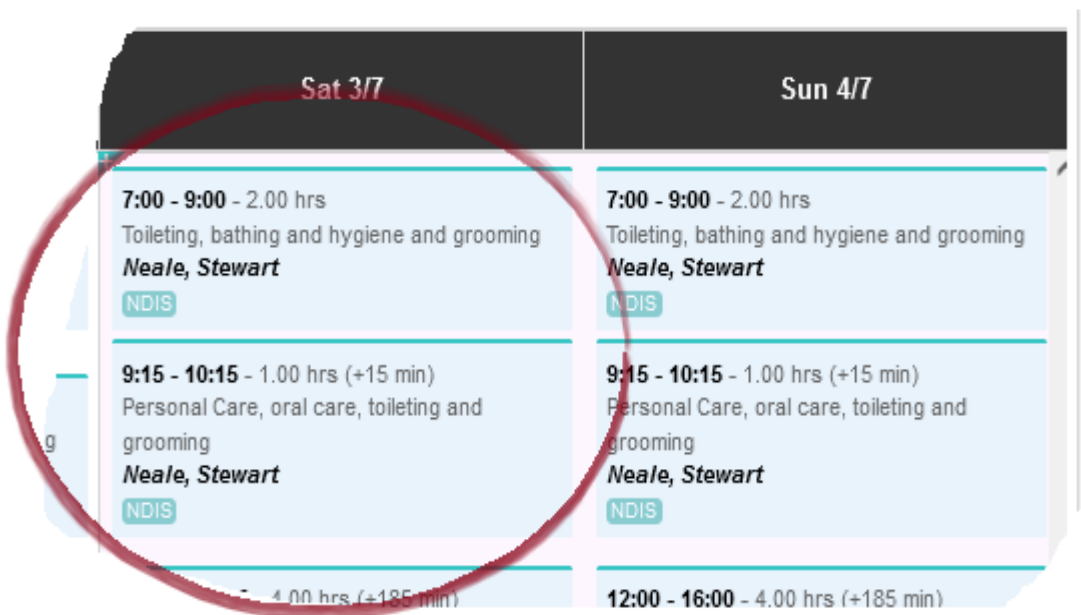

4. Within the from date field either accept the default date listed or input in free text or select from the calendar picker the revised start date that will cover the range for service schedule creation.

5. Within the to date field either accept the default date listed or input in free text or select from the calendar picker the revised end date that will cover the range for service schedule creation.

6. Select the service types that will be used as the template for the creation of the service schedules for the period defined by the from and to dates.

| ☑ | CORE - Assistance with personal domestic activities | Neale, Stewart | Daily | 07:00 AM | 09:00 AM | 2.00 |
| ☑ | CORE - Assistance with personal domestic activities | Neale, Stewart | Weekly | 09:15 AM | 10:15 AM | 1.00 |

✔ Create

7. Select the **Create** button to generate the service schedules, based upon the attributes held against the selected service types.

| Sat 3/7	Sun 4/7
7:00 - 9:00 - 2.00 hrs Toileting, bathing and hygiene and grooming *Neale, Stewart* NDIS	**7:00 - 9:00** - 2.00 hrs Toileting, bathing and hygiene and grooming *Neale, Stewart* NDIS
9:15 - 10:15 - 1.00 hrs (+15 min) Personal Care, oral care, toileting and grooming *Neale, Stewart* NDIS	**9:15 - 10:15** - 1.00 hrs (+15 min) Personal Care, oral care, toileting and grooming *Neale, Stewart* NDIS
4.00 hrs (+185 min)	**12:00 - 16:00** - 4.00 hrs (+185 min)

Adjusting the Activity Status of a Service Schedule Template Record

Under this topic we will outline the deactivation of the Service Schedule Template record through the Service Schedule Template sub-menu. Deactivation of a template will happen either under the circumstances of the Service Schedule Template having been replaced with a new template or where the participant has ceased their engagement with the organisation.

To Adjust the activity status of a template record through the Service Schedule Template menu observe the following steps:

1. Select the **Service Template** icon located on the client panel within the schedule board
2. Highlight the template record to be edited click on the **Edit** button to open it within the Service Schedule Template page.
3. To deactivate the Service Schedule Template record, select the **Deactivate** button
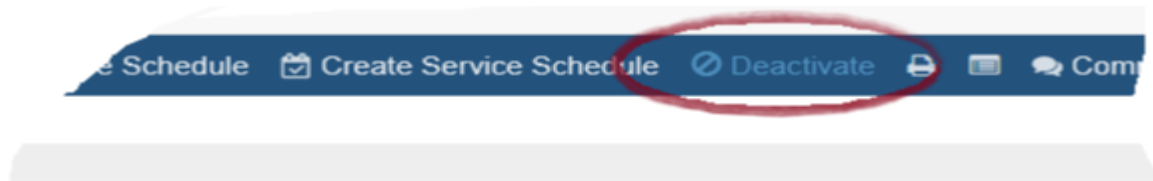
4. To activate the Service Schedule Template record, select the **Activate** button.
5. Once done, select the **Close** button to exit the form