

## Adding client funding records

This is for support coordination, 1:1 support work and SSG social support groups.

- Open Brevity
- Open Client Tab
- Select Client
- Search for the client with either first or surname.
- Double click on client name

File needs to be double checked for compliance.

- “Support Workers” need to be linked and updated with current employees only.  
**Please use this for support coordinators. Engagement Coordinator will update the link for their own LSO staff**
- Find client funding on right hand side of the main client screen

**Client Funding** +

Name	Funding Source	Type	Start Date	End Date
Lui - NDIS - 03/23 to 03/24	NDIS	Individual	20-03-2023	19-03-2024

Showing 1 to 1 of 1 entries Previous Next

- If you are updating the file with a new plan then double click the funding record to open it.
- If you are entering a new funding record follow the steps to add the funding in the next section.

Close
Funding Report Unpublish Create Cop

On this form: Client Funding Details Services

**Client Funding Details**

Client Funding Details

Type\* Individual

Client Lui - Griffiths, Joel - 0501

Funding Source\* NDIS

Registration Number 430508980

Pricelist\* NDIS JUL-22

Invoice To

Notes

**Budget**

Start Date\* Mon, 20/03/2023

End Date\* Tue, 19/03/2024

Budget\* 6008.40

Allocated 1374.92

Utilised Total\* 1374.92

Opening Balance 0.00

Balance\* 4633.48

**Services**

Services +









Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	Created On	Client Funding	Code	Registration Nu
Lui - NDIS - 03/23 to 03/24 - SUPPORT - Coordination of supports (07_002_0106_8_3)	SUPPORT - Coordination of supports	6008.40	1374.92	1374.92	4633.48	20/03/2023 10:40:23 AM	Lui - NDIS - 03/23 to 03/24		430508980

Showing 1 to 1 of 1 entries Previous



## Adding client funding records

Funding needs to be unpublished and deactivated.

- Click unpublish
- Click ok
- Click deactivate

 Funding Report  Bulk Add Services  Publish  Edit Name  Create Copy  Deactivate   Delete

t

Start Date*	 Mon,20/03/2023
End Date*	 Tue,19/03/2024
Budget*	6008.40
Allocated	1374.92
Utilised Total*	1374.92
Opening Balance	0.00
Balance*	4633.48

- Click Save
- Click close (this will finalise the deactivation.
- Click save on main client file.
- Scroll back down to the client funding record section
- Click the plus sign

## Adding client funding records

**Client Funding** +

Name	Funding Source	Type	Start Date	End Date
No data available in table				

Showing 0 to 0 of 0 entries Previous

---

**Client Funding Details**

<p><b>Client Funding Details</b></p> <p>Type* <input type="text" value="Individual"/></p> <p>Client <input type="text" value="Lui - Griffiths, Joel - 0501"/></p> <p>Funding Source* <input type="text"/></p> <p>Registration Number <input type="text" value="430508980"/></p> <p>Pricelist* <input type="text"/></p> <p>Invoice To <input type="text"/></p> <p>Notes <input type="text"/></p>	<p><b>Budget</b></p> <p>Start Date* <input type="text"/></p> <p>End Date* <input type="text"/></p> <p>Budget* <input type="text"/></p> <p>Allocated <input type="text"/></p> <p>Utilised Total* <input type="text" value="0"/></p> <p>Used to Date <input type="text" value="0"/></p> <p>Balance* <input type="text" value="0"/></p>
---	--

- Complete the required fields based on the NDIS plan
- If the funding line item you are loading is for social community access then the funding source will relate to how the funding is managed i.e. plan managed or NDIA managed

### My Core Supports funding will be:

- \$60,203.04 Plan-managed

OR

If you are loading support coordination funds check how this funding is managed to ensure you are selecting the correct funding source.

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

### My Stated Supports funding will be:

- \$12,016.80 NDIA-managed  
Level 2: Coordination Of Supports

## Adding client funding records

- Click funding source
- Options will show as a list. Select appropriate based on service as mentioned above. Plan managed funding is PLAN, NDIA managed funding is NDIS, Support Coord funding that is plan managed will also be PLAN and have an “invoice to” section to be included. i.e. headway Gippsland.
- Click which source you require
- Click price list
- Select most recent

Pricelist\*

- Enter start date as the NDIS plan start date
- Enter end date as the NDIS plan end date
- Budget is what is shown on NDIS plan

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

### My Stated Supports funding will be:

- \$12,016.80 NDIA-managed  
Level 2: Coordination Of Supports

- Click save

Now you will need to enter the service

- Click on the plus in the services section

Services						
Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	Create
No data available in table						

Showing 0 to 0 of 0 entries

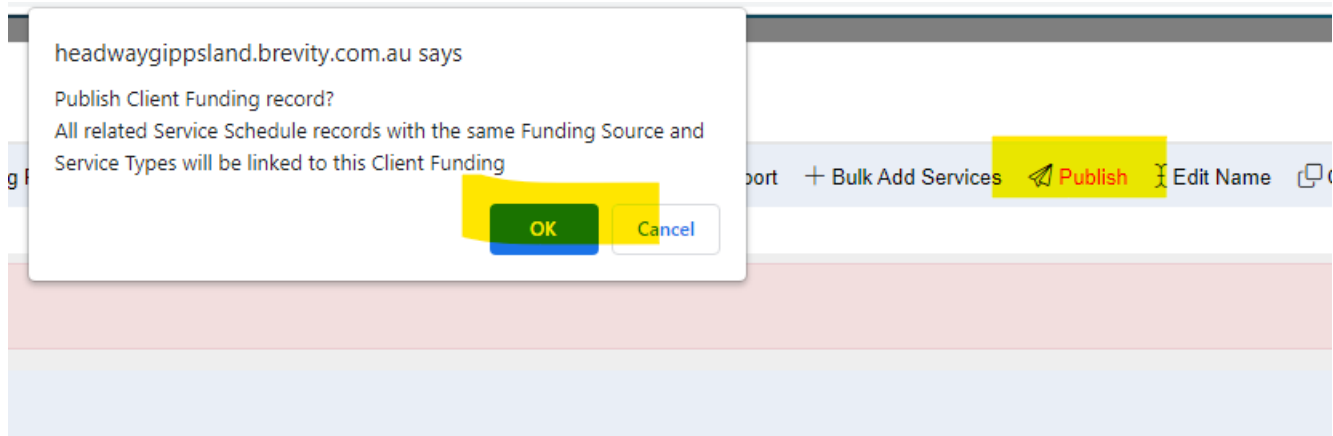
## Adding client funding records

- Click service type (this relates to the service being provided. i.e. coordination of supports)

Client Funding Code details	Allowed Rates
Client Funding* <input type="text" value="Lui - NDIS - 04/23 to 04/24"/>	After Hours <input checked="" type="radio"/> Yes <input type="radio"/> No
Service Type* <input type="text" value="SUPPORT - Coordination of supports (07_002_0106_8_3)"/>	Saturday <input checked="" type="radio"/> Yes <input type="radio"/> No
Budget (optional) <input type="text"/>	Sunday <input checked="" type="radio"/> Yes <input type="radio"/> No
Used to Date* <input type="text" value="0"/>	Public Holiday <input checked="" type="radio"/> Yes <input type="radio"/> No
Allocated <input type="text"/>	
Utilised Total <input type="text" value="0"/>	<b>Activity Based Travel &amp; Transport</b>
Balance <input type="text" value="0"/>	Transport Funding Code <input type="text"/>
	Travel Funding Code <input type="text"/>

- Enter budget as per NDIS plan
- Click the yes buttons on the right hand side for billing purposes.
- Click save
- Click close
- Click save on main funding
- Now publish the funding
- Click publish

## Adding client funding records



headwaygippsland.brevity.com.au says

Publish Client Funding record?

All related Service Schedule records with the same Funding Source and Service Types will be linked to this Client Funding

OK Cancel

Support + Bulk Add Services Publish Edit Name

### Budget

Start Date*	<input type="text" value="Tue, 11/04/2023"/>
End Date*	<input type="text" value="Wed, 10/04/2024"/>
Budget*	<input type="text" value="6008.40"/>
Allocated	<input type="text"/>
Utilised Total*	<input type="text" value="0.00"/>

- And click OK
- Click close