

Checking ended NDIS plan

Finance will send an email to Intake with any date changes for bookings in Brevity.

Example of email:

From: Brevity Care Software <alert@brevitycaresoftware.com>

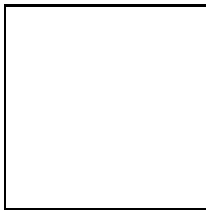
Sent: Wednesday, 5 April 2023 9:45 AM

To: Finance <finance@headwaygippsland.org.au>

Subject: Participant Plan Dates Changed

Hi,

Just notifying you that The End Date for plan 'Hough, Lucinda - 9223 - Pending - 04/22 to 03/23' has been changed from '07-Feb-2023' to '07-Feb-2023'



- Brevity

- Open PRODA

- Click Client Tab

Select Client

Enter client name from email

Click on plan management funding – found on right side of main client screen.

If service booking date has passed, funding needs to be amended to “pending”

Hough, Lucinda - 9223 - Pending - 04/22 to 03/23

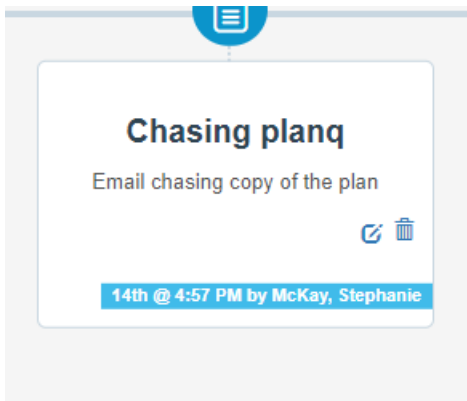
Close Funding Statement Service Bookings Active

On this form: Plan Details Budgets Invoices Allocated Budgets

Plan Details

Details	Plan Dates
Client* <input type="text" value="Hough, Lucinda - 9223"/>	Start Date <input type="text" value="Wed,20/04/2022"/>
Funding Source* <input type="text" value="Pending"/>	End Date <input type="text" value="Tue,07/02/2023"/>
NDIS Number* <input type="text" value="431898672"/>	Plan Start Date* <input type="text" value="Tue,08/03/2022"/>
Pricelist* <input type="text" value="NDIS JUL-22"/>	Plan End Date <input type="text" value="Tue,07/02/2023"/>
Price Guide* <input type="text" value="NSW, VIC, QLD, ACT"/>	Notes

- Click save and close funding screen
- Email or phone call is then made to the participant/nominee or Support coordinator (if one is listed) chasing a copy of the new plan.
- Note to be added to notes tab top of client screen.
- Template to be used – “Email chasing copy of the new plan”



Follow up 2 weeks later – you need to pull the report in the plan management area by searching pending plans with an old end date. See steps below

- Client Care Management
- Click plan management
- Click on the wording “plan end date” to filter by the end dates

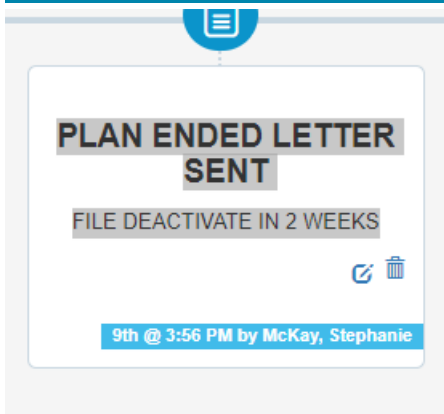
Plan Management Plan List | Active pmlans ... Home / Plan Management

+ New [Edit](#)
[Invoice Processing Fee](#)
[Import Invoices](#)
[Import Service Bookings](#)
[Resend Remittance](#)
[Filter](#)
[Mail Merge](#)
[Import](#)
[Delete](#)

id	Name	Funding Source	NDIS Number	Pricelist	Plan Start Date	Plan End Date
16154	Mizzi, Josephine - 0346 - Pending - 01/22 to 11/23	Pending	430732377	NDIS JUL-22	20-01-2022	09-10-2022
16120	Francois, Adrian - 9156 - Pending - 01/22 to 12/23	Pending	431070087	NDIS JUL-22	08-12-2021	26-02-2023
16064	May, Peter - 1068 - Pending - 11/21 to 03/23	Pending	431514980	NDIS JUL-22	26-11-2021	14-03-2023
7231	Meddings, George - 0493 - Pending - 03/21 to 03/23	Pending	430574537	NDIS JUL-22	25-03-2021	16-03-2023
16246	Sutton, Stanley - 0836 - Pending - 02/22 to 03/23	Pending	430376716	NDIS JUL-22	21-02-2022	22-03-2023

- Funding source should show pending, this will give you the list of clients you need to follow up.
- If it has been over 2 weeks since you emailed/phoned you will need to send a **PLAN ENDED LETTER**.
- Find this in the link below
M:\9. Intake\Letters to [participants](#) - plan ended
- Enter participant name/nominee name and post using address on client file in Brevity.
- Add file note using template - **PLAN ENDED LETTER SENT**

FILE DEACTIVATE IN 2 WEEKS



No response after 2 weeks – please make client inactive and add to excel spreadsheet – See Monthly reporting procedure

Deactivate client file – see procedure deactivate client.