

Checking EXTENDED NDIS plan

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

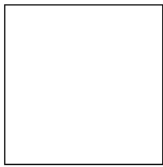
Always call to gain consent and check that any details need adding, also complete intake if this has not been done previously.

Example of email:

From: Brevity Care Software <alert@brevitycaresoftware.com>
Sent: Wednesday, 5 April 2023 9:07 PM
To: Finance <finance@headwaygippsland.org.au>
Subject: Participant Plan Dates Changed

Hi,

Just notifying you that The End Date for plan 'Wilson, Jarad - 1018 - NDIS - 04/22 to 04/23' has been changed from '05-Apr-2023' to '04-Apr-2024'



- Brevity

You can also pull a report from plan management funding to check old plan dates – you will need to have PRODA open to check if the plan has extended or not.

- Open Care Management
- Plan management
- Click “plan end date” to filter old dates to the top of the page

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

+ 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
16749	Watkinson, Sharon - 0608 - Pending - 10/22 to 03/23	Pending	430917155	NDIS JAN-22	14-10-2022	27-03-2023
16172	James, Mycalie - 0328 - Pending - 01/22 to 03/23	Pending	430372993	NDIS JUL-22	12-01-2022	28-03-2023
16048	James, Brodie - 0342 - Pending - 11/21 to 03/23	Pending	430372992	NDIS JUL-22	25-11-2021	30-03-2023
16367	Turner, Tray - 1148 - Pending - 04/22 to 03/23	Pending	431522878	NDIS JUL-22	06-04-2022	30-03-2023
16193	Gleeson-Brown, Robert - 1244 - Pending - 12/21 to 04/23	Pending	430637062	NDIS JUL-22	08-12-2021	02-04-2023
16875	Telfer, Mitchell - 0506 - Pending - 01/23 to 04/23	Pending	430801808	NDIS JUL-22	06-01-2023	02-04-2023
16247	Crawford, Tina - 0651 - Pending - 02/22 to 04/23	Pending	430504690	NDIS JUL-22	18-02-2022	03-04-2023
7848	Panoutopoulos, Jasmin - 1323 - NDIS - 04/21 to 03/23	PLAN	431482868	NDIS JUL-22	30-03-2021	04-04-2023
15737	Batty, Suzanne - 1073 - Pending - 08/21 to 04/23	Pending	430948077	NDIS JUL-22	19-08-2021	04-04-2023
16882	Gibson, Bradley - 9292 - PLAN - 11/22 to 11/23	PLAN	431161706	NDIS JUL-22	28-11-2022	04-04-2023
16348	Van Dorp, Mason - 0639 - NDIS - 04/22 to 04/23	PLAN	430204078	NDIS JUL-22	07-04-2022	07-04-2023

Open PRODA

- Select Service booking



Service Booking


Create and manage service bookings

- Open “view service bookings” tab

Home / My Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status, booking number or quote ID

View Service Booking-Help 

Find a Participant

Enter participant name or NDIS number

▼ Refine Search

Search

Search Results

9,635 Results found

Sort By

Service Booking Number ▼

- Enter client’s name, either first or surname NOT BOTH
- Find the record relating to the client

Service Booking Number	Quote ID	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
60244950	Not available	Plan Managed	Jarad Wilson (430963765)	05/04/2022	04/04/2024	13/05/2022	Active	Provider
60244910	Not available	Standard Booking	Jarad Wilson (430963765)	05/04/2022	04/04/2024	13/05/2022	Active	Provider

- Both records will need to be updated.
- Open the first record
- This will show the extended plan dates

View Service Booking Details
Detailed view of the selected service booking



The service booking has been extended to align with the updated plan of the participant.

Service Booking Details

Participant Name (NDIS Number)	Type	Number	Quote ID	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Jarad Wilson (430963765)	Plan Managed	60244950	Not available	05/04/2022	04/04/2024	-	\$10,156.31	-	Active

- Select “update Allocation”
- Funding should be able to be duplicated – this means the NDIA have allowed the plan to extended for a further 12 months and will effectively give the same amount of funding again. Increasing the funded booking.

Jarad Wilson (430963765)	Plan Managed	60244950	05/04/2022	04/04/2024	-	\$10,156.31	-	Active
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Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount
1	CB Daily Activity	-	-	1	\$6,799.86	\$1,868.43
2	CB Social Community and Civic participa	-	-	1	\$1,627.25	\$1,627.25
3	Consumables	-	-	1	\$1,000.00	\$1,000.00
4	Social Community and Civic Participation	-	-	1	\$500.00	\$500.00
5	Daily Activities	-	-	1	\$229.20	\$229.20

* I declare that this Service Booking has been discussed with and agreed by the participant.

Tick box and select submit once you have updated the funding.

- If the screen shows a red error across the top of the screen, copy and paste the amount given and paste into the appropriate line item.



Support Category CB Daily Activity amount 15,200.00 exceeds the Funds Management amount 13,581.14

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking



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1	CB Daily Activity	-	-	1	\$6,799.86	\$1,868.43

- Tick the box and submit again.

Go back to view service booking and follow the above steps to update any active bookings for the client.

There should be plan management funding for monthly fees (not set up, you can only calim 1 set up fee) and plan management funding items for core and CB budgets.

Client screen in Brevity now needs to be “synced” to pull the records from PRODA.

- Open client tab
- Select client
- Enter client name – first OR surname
- Double click to open file
- Scroll down to “plan management funding” on the right hand side of the screen
- Double click on the funding line item to open it
- Click service bookings

ive Close

Funding Statement **Service Bookings** Deactivate Communicate

is form: Plan Details Budgets Invoices Allocated Budgets

1 Details

Details

Client*

Funding Source*

NDIS Number*

Pricelist*

Price Guide*

Plan Dates

Start Date*

End Date*

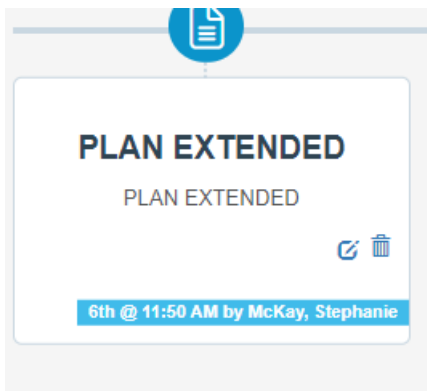
Plan Start Date*

Plan End Date

Notes

Notes

- Click “resync Brevity Budgets”
- Close
- Save and close
- Update the client checklist with new end dates
- Add client note in notes TAB



- Open emails
- Create new email
- Send email to ALL PLAN MANAGEMENT
- See template below



Microsoft Word ribbon showing the Clipboard, Basic Text, and Names tabs. The Basic Text tab is active, showing options for Bold (B), Italic (I), Underline (U), text color (A), font size (11), and alignment. The Names tab is also visible, showing options for Address Book and Check Names.



To

Cc

All Plan Management Team;

Subject Jarad Wilson - PLAN EXTENDED

Kind Regards,

Stephanie McKay

Client Services Intake Coordinator

Monday – Friday

9am – 3pm

Headway Gippsland

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Supporting people with an Acquired Brain Injury, other disabilities and their families