

Client Checklist

Checklist must be updated in accordance with compliance and audit requirements. Monitored from the main client screen in Brevity, documents and dates must be relevant to the NDIS plan.

The checklist must be updated if there are any changes to the NDIS plan dates – this includes plan being extended and the plan ending.

Documents are to be uploaded against each checklist item.

Client Checklist is the only area of Brevity where you can DELETE the old document and replace with the new one.

Checklist

Name	Expiry	Present
Service Agreement / Miscellaneous Deed	11-Apr-2023	⊗
Schedule Of Supports	11-Apr-2023	⊗
NDIS Plan / Request for services	11-Apr-2023	⊗
OH&S Checklist		⊙
Support Plan	11-Apr-2023	⊗
Headway Services Consent	11-Apr-2023	⊗

- Red cross indicates the checklist item is expired
- Green tick indicates the checklist is completed and current
- Pending circle indicates we do not have the document and require it. No date will be listed for anything pending.

When an item is completed and you have the document

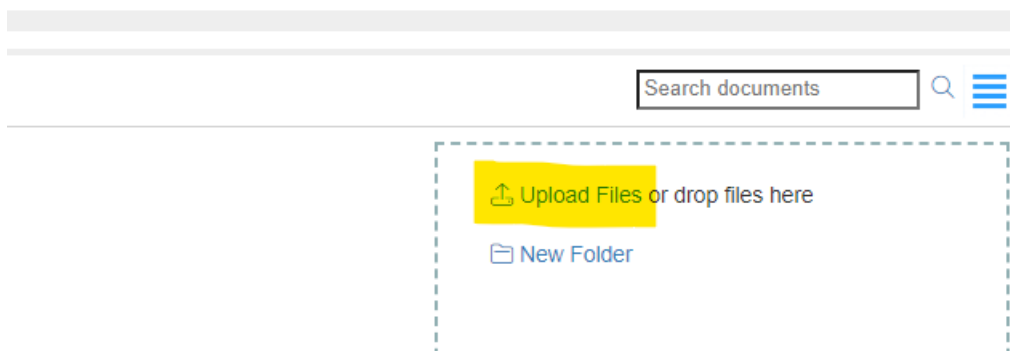
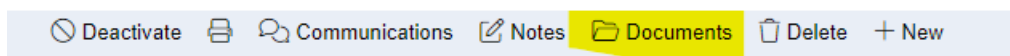
- Click on the line relevant
- The below will open

Client Checklist

Client*	<input type="text" value="McIntyre, Lynne - 0175"/>
Item*	<input type="text" value="Service Agreement / Miscellaneous Deed"/>
Expiry Date	<input type="text" value="Tue, 11/04/2023"/>
Status*	<input type="text" value="Completed"/>
Description	<input type="text"/>

To upload the document

- Click document
- Click upload files



- Find the document in DOCS – IN PROGRESS (this is where you will always save your documents)
- [Client Services \(V\) > Client Services - Headway Documents](#)
Find the document and click open
- Enter Expiry Date – this is the plan end date
- Change status to completed
- No description is needed unless document is not required. Then the note says NA
- Click Save
-



Client Checklist

“Headway Services Consent” – the below template is used in the notes section and the date listed is the end date of the current NDIS plan. No document is required for this section.

Preparation of Intake Documents

Intake documents Schedule of Supports, Service Agreement prepared for plan dated to

Verbal consent given by to provide/continue Headway Gippsland services for and for Headway Gippsland to liaise with other people/organisations as per Service Agreement.

Participant Handbook, About us, Compliments/Complaints, Plan Management Local Service Providers. Plan Management Consumer Information sent

Documents emailed / posted toto be reviewed and signed, writer to follow up with if documents are not returned within 2 weeks.

- Enter the details in the blank spaces from the template above.
- Click save
- Click close