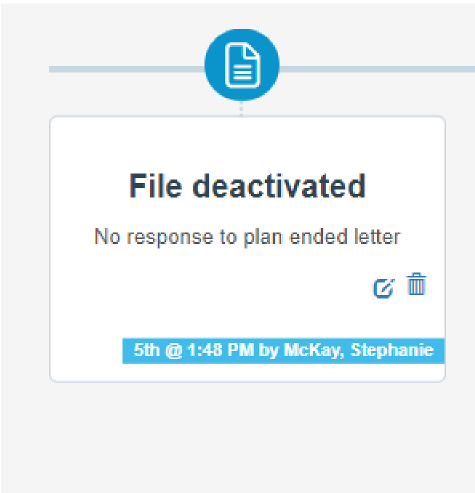
# Deactivating a client file

Files can be deactivated for a number of reasons

- Failure to make contact after a plan has ended
- Request to cease services
- No longer receiving NDIA funding.

Open Brevity

- Click clients tab
- Click Client
- Type in client first OR surname and double click the name to open file.
- Enter Note – Select notes tab (this will be the email outling the decision to cease services or a note to state failure to contact after plan ended letter has been sent.
- E.g.



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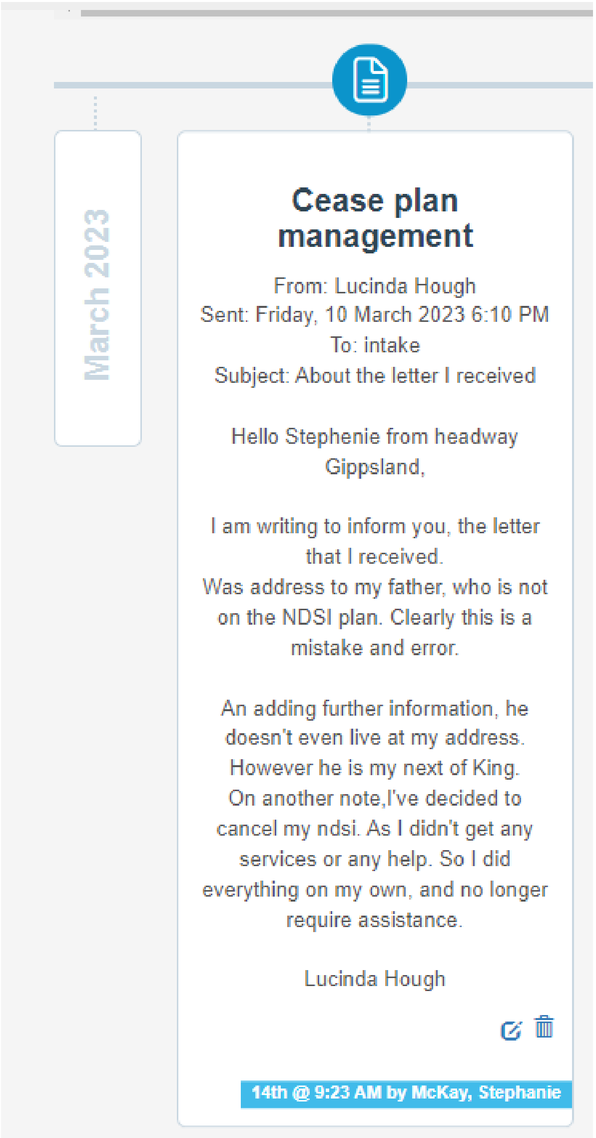


Funding records also need to be deactivated.

- Open plan management funding on main brevity client screen
- Select deactivate
- Select save
- Close

Client Checklist items are to now be deactivated

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Checklist

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

Click on each item separately and select deactivate.

- Click save
- Close
- Complete with each line that shows a date
- Close checklist
- Select save – top left corner of main client brevity screen

There should now be no dates listed on the client checklist as pictured above.

Click deactivate

- Select reason from the drop down box relating to the reason why participant is leaving Headway.
- Enter comments. i.e. no contact. OR ceased services, moving to another provider.
- Click deactivate

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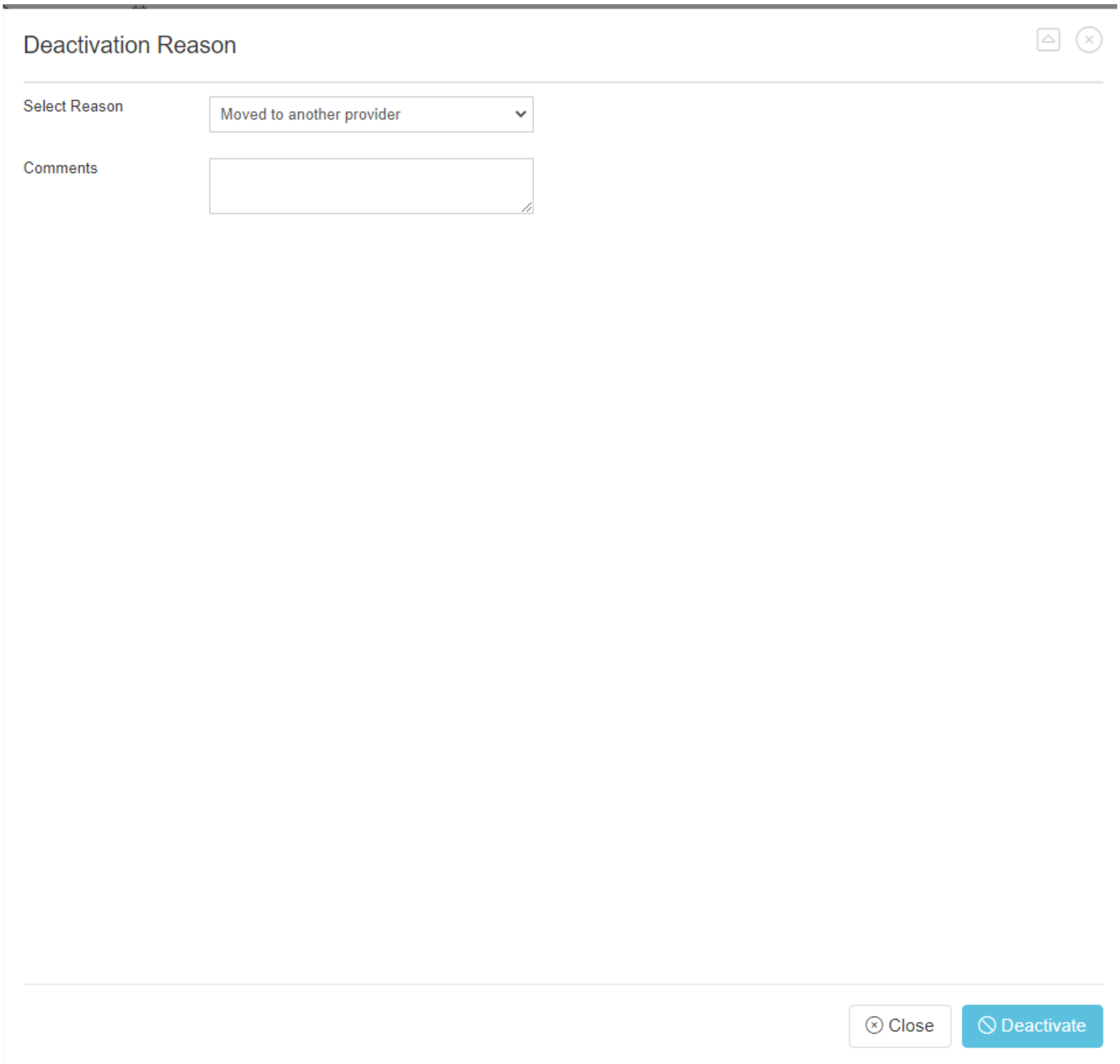


Send a bulk email to all staff listed below to advise of the reason why the client is being deactivated and the date service booking will be closed.

Example.

HEADWAY
GIPPSLAND INC.

# Deactivating a client file

Send

From: intake

To: All Plan Management Team; Finance; Co-ordination; Dianne Mumford

Cc: Wendy Matthews; Debbie van Rossum

Subject: FW: Paul Drudge

Good morning,

As per below, Paul Drudge has passed away 6/4/23
Service booking will be closed in 30 days.

Service booking will be closed 4/05/2023 to allow for any remaining invoices to be paid.

Kind Regards,

**Stephanie McKay**
Client Services Intake Coordinator
Monday – Friday
9am – 3pm

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