General Notes – misc. information

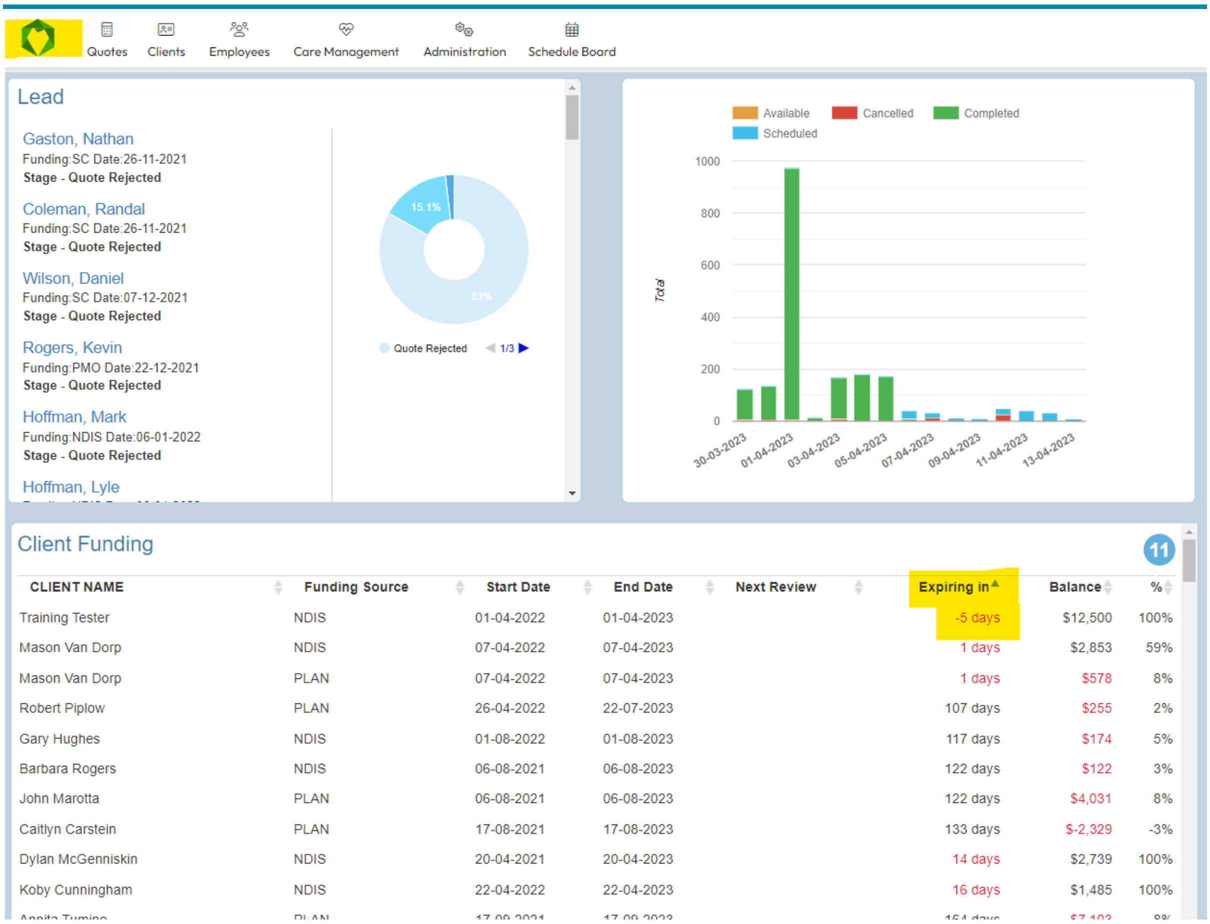
Each morning open the following TABS

- Brevity with 3 extra tabs across the screen
- Monthly report new and renew participants excel spreadsheet
- PRODA Tab
- Emails

Check client funding on main page in brevity by clicking the blue brevity picture top left of the page. Files ended will be found by clicking the wording “expiring in”. File will show a negative number.

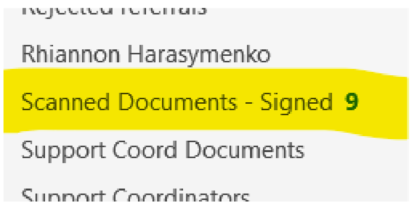
- Open client tab
- Click clients
- Search the client with a negative number
- Check main brevity for both client funding section and plan management section to work out if the plan has been extended or ended.

General Notes – misc. information



CLIENT NAME	Funding Source	Start Date	End Date	Next Review	Expiring in	Balance	%
Training Tester	NDIS	01-04-2022	01-04-2023		-5 days	$12,500	100%
Mason Van Dorp	NDIS	07-04-2022	07-04-2023		1 days	$2,853	59%
Mason Van Dorp	PLAN	07-04-2022	07-04-2023		1 days	$578	8%
Robert Piplow	PLAN	26-04-2022	22-07-2023		107 days	$255	2%
Gary Hughes	NDIS	01-08-2022	01-08-2023		117 days	$174	5%
Barbara Rogers	NDIS	06-08-2021	06-08-2023		122 days	$122	3%
John Marotta	PLAN	06-08-2021	06-08-2023		122 days	$4,031	8%
Caitlyn Carstein	PLAN	17-08-2021	17-08-2023		133 days	$-2,329	-3%
Dylan McGenniskin	NDIS	20-04-2021	20-04-2023		14 days	$2,739	100%
Koby Cunningham	NDIS	22-04-2022	22-04-2023		16 days	$1,485	100%

Signed documents that have been scanned by reception can be stored in the outlook folder until saved and uploaded to the client file.



NEVER DELETE ANYTHING - **ALWAYS DEACTIVATE**

General Notes – misc. information

Archive all emails, **never delete** – Folders for people and relevant info are set on intake emails.

Intake funding books – these books hold anyone who has ever had funding loaded with Headway.

Ticks are when you have prepared and sent the documents

Highlighted left hand side refers to the client being support coordinated, once docs are prepared place a tick here too

Intake book – anyone referred to headway is listed here, once referral is accepted a highlighted line is placed through it. This helps to determine who is still pending. Add these clients to the lead list in Brevity for management to monitor (see Quotes/Lead procedure)

Weekly – Check compliance on client files.

Start at the top of the client list and check the following details to ensure all data is up to date

- Name
- NDIS number
- Living arrangements
- Primary Disability
- Documents have been returned (client checklist)
- Contact details
- Contact person is listed
- Client funding is active – if not, investigate to deactivate file is necessary

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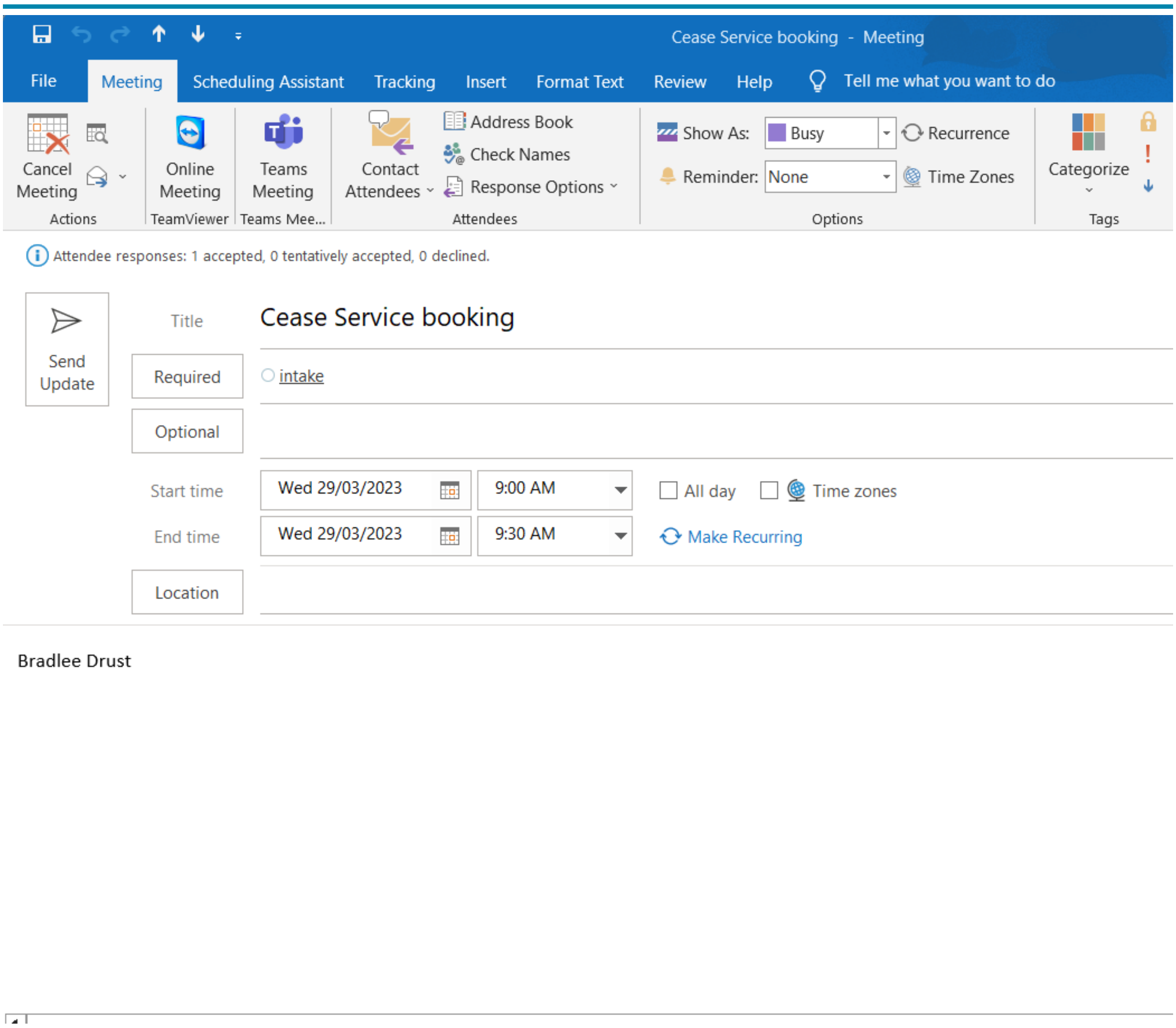
If a client gives 30 day notice to cancel. Always create a calendar invite to intake with “cease service booking” and client name as an alert to ensure bookings are ended in brevity and PRODA.

General Notes – misc. information



Program on clients should reflect the below

PLAN – those who are plan managed by Headway

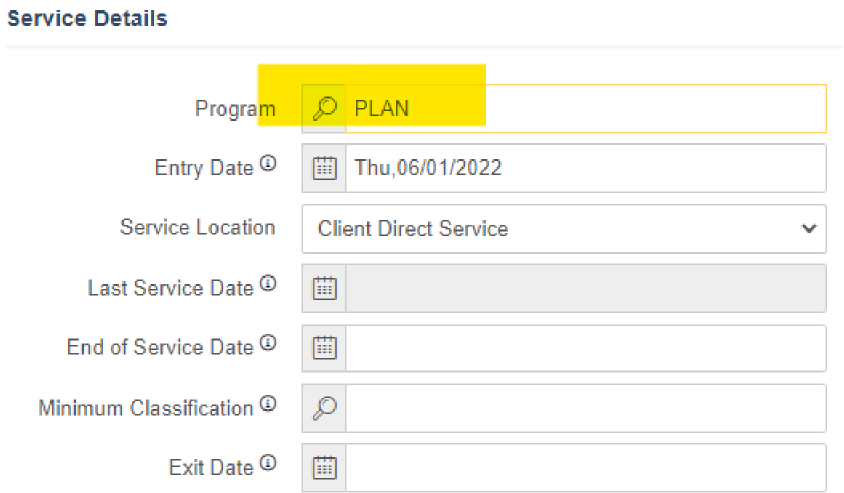
SC – any support coordinated client

SEFL – they self manage their NDIS funding

TAC – generally attend the groups and don't have NDIS

General Notes – misc. information

If clients still have NDIS as the program ID this will need to be updated and then follow the checklist update to ensure compliance requirements are still met.



Client with OPA guardian will only have a service deed completed. This replaces all other agreements and can be completed online through https://www.publicadvocate.vic.gov.au/guardianship-and-administration/opa-s-ndis-deeds

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