Setting up a new client file in Brevity

- Initial call/email or request for service
- Ask for a copy of the NDIS plan to be emailed to intake@headwaygippsland.org.au
- Save NDIS plan to following file path
- M:\6. Plan Management Team\Plan Management DOCS - IN PROGRESS\Plan Management DOCS - IN PROGRESS
- Discuss intake questions – always ask for primary disability – put this into the intake referral note book.
- Add client as a lead until consent has been provided verbally – always make this note in notes tab in the below instructions.

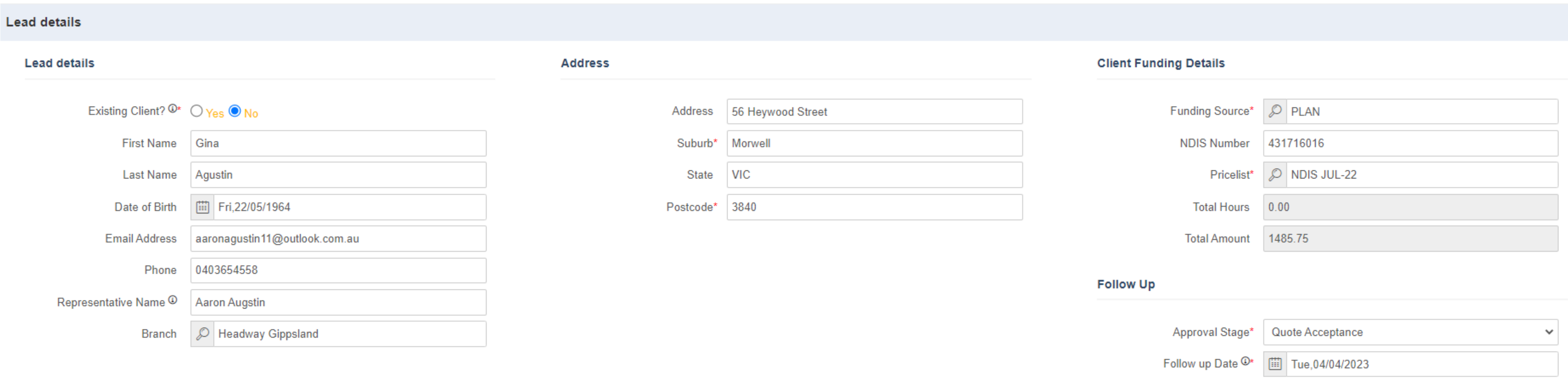
Open Brevity

Click “Quotes” tab

Click New

Fill in details as per below – be sure to include all details during the phone call/email etc

HEADWAY
GIPPSLAND INC.



Lead details

Lead details

Existing Client?* ○ Yes ◉ No
First Name: Gina
Last Name: Agustin
Date of Birth: Fri,22/05/1964
Email Address: aaronagustin11@outlook.com.au
Phone: 0403654558
Representative Name: Aaron Augstin
Branch: Headway Gippsland

Address

Address: 56 Heywood Street
Suburb*: Morwell
State: VIC
Postcode*: 3840

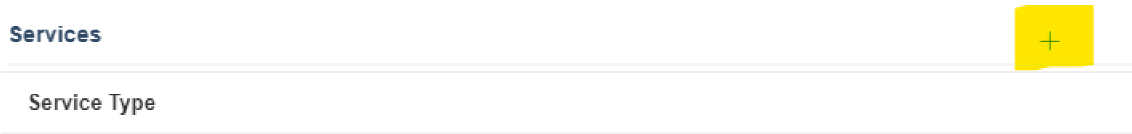
Client Funding Details

Funding Source*: PLAN
NDIS Number: 431716016
Pricelist*: NDIS JUL-22
Total Hours: 0.00
Total Amount: 1485.75

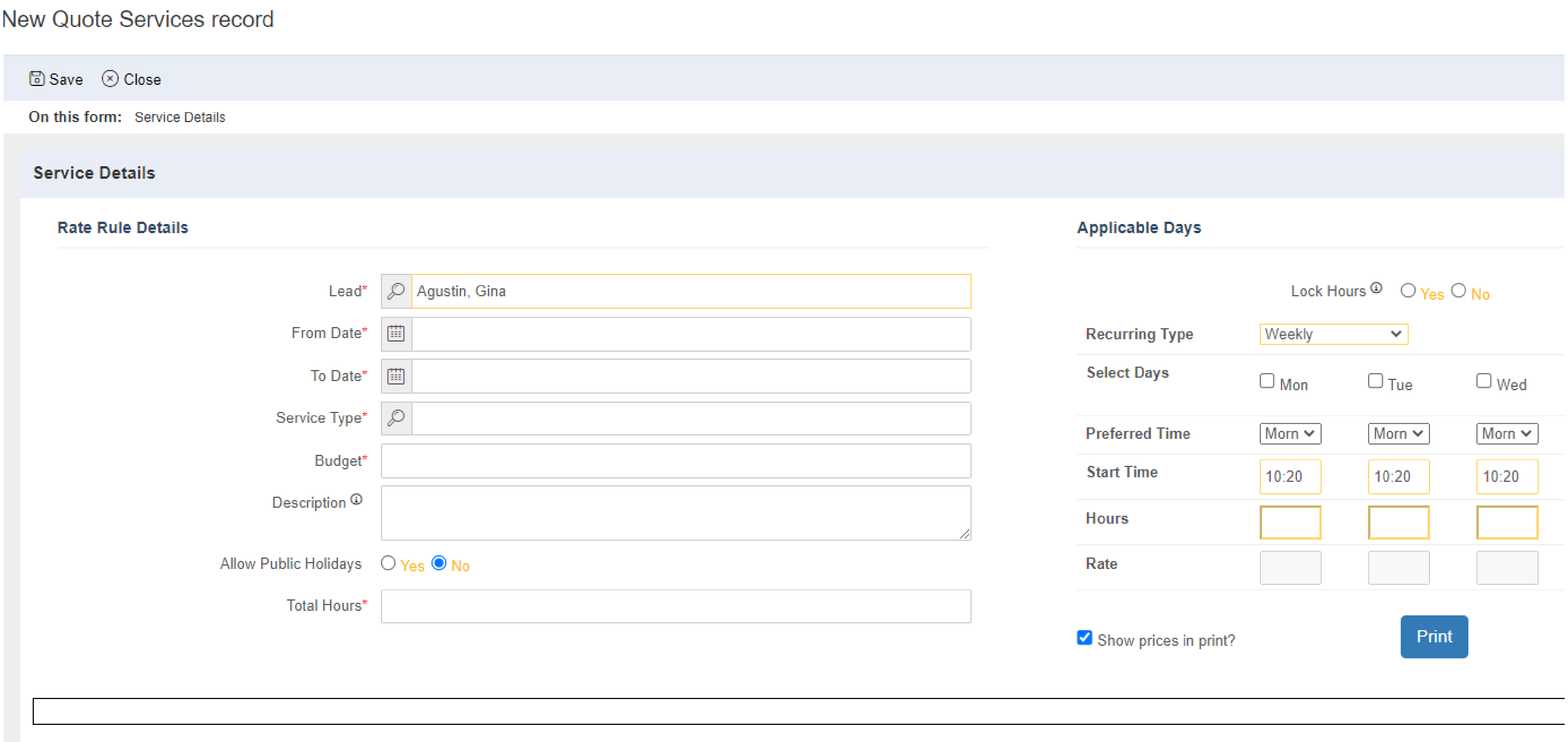
Follow Up

Approval Stage*: Quote Acceptance
Follow up Date*: Tue,04/04/2023

- Click Save
  Now to add the service requested – i.e. plan management
- Click plus under 'services' at the bottom of the page



This page will need to be completed (picture below)



New Quote Services record

Save Close

On this form: Service Details

Service Details

Rate Rule Details

Lead* Agustin, Gina

From Date*

To Date*

Service Type*

Budget*

Description

Allow Public Holidays Yes No

Total Hours*

Applicable Days

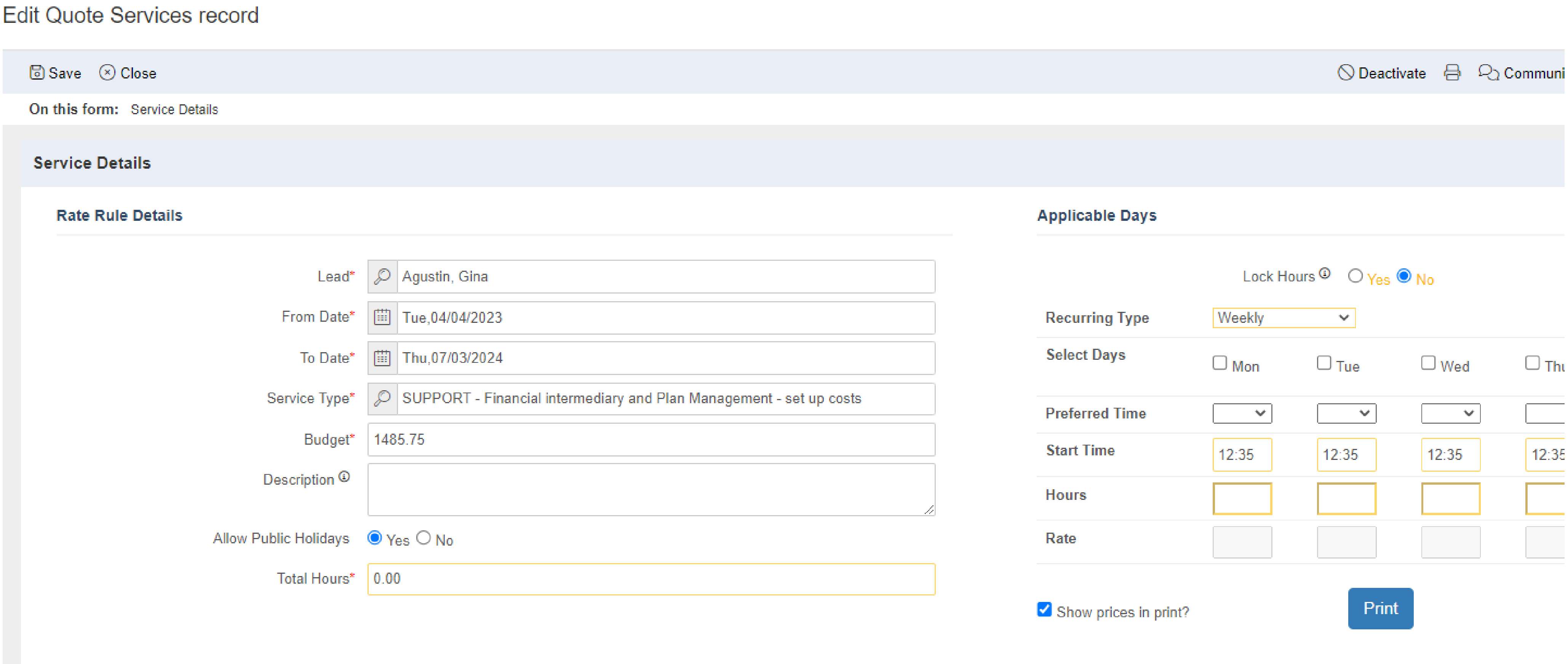
Lock Hours Yes No

Recurring Type	Weekly		
Select Days	Mon	Tue	Wed
Preferred Time	Morn	Morn	Morn
Start Time	10:20	10:20	10:20
Hours			
Rate			

Show prices in print?

Print

- Complete asterisk fields only.
- Details will be found on the participants NDIS plan which you should have been given at the commencement of requesting a service with Headway
- Enter the date range as per NDIS plan
- Click service type drop down and find the code relating to the service you are charging. – plan management will be SUPPORT – Financial intermediary and Plan Management – set up costs. Support Coordination – Coordination Level 2 etc.
- Enter the budget as per the NDIS plan
- Include total hours, this refers to the amount of money allocated in the budget for that particular service.
- Click save
- The page should look like this (below)



- Click close
- Complete the "Follow up" section

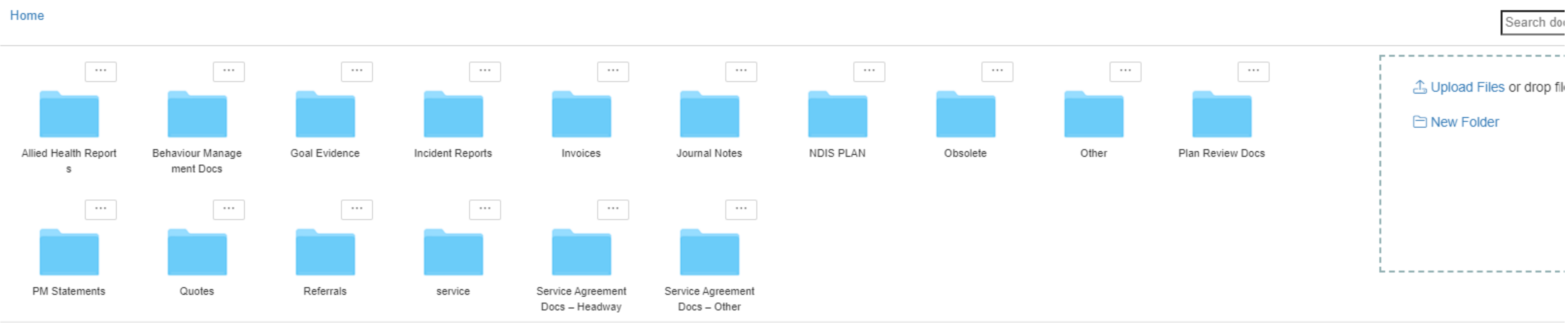
- Approval stage relates to the request being rejected or approved. – to be able to convert the client to an actual file, you need to select “service agreement signed”
- Follow up date relates to the date you are completing the request i.e. 04/04/2023.

- Click save
- Open Documents TAB

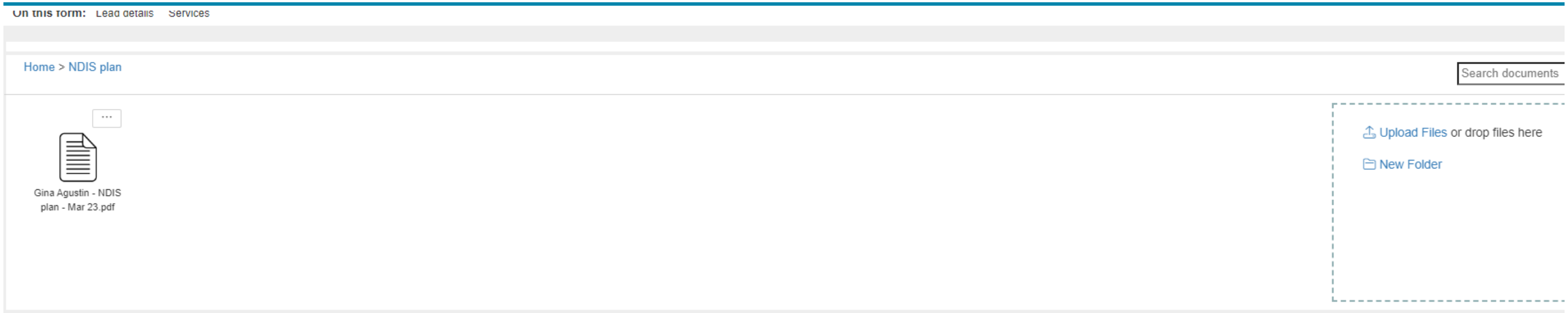
Create new Document folders under Document TAB on main client screen.

All folders below need to be created.

- Select “new Folder”
- Make these individually

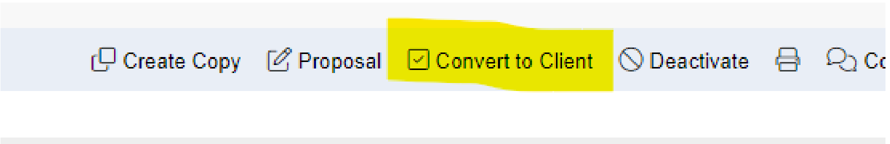


- Upload document to appropriate folder by opening the folder
- Click on folder
- Select "upload files"
- Displays QMS document folder to find where your completed document is saved.
- M:\6. Plan Management Team\Plan Management DOCS - IN PROGRESS\Plan Management DOCS - IN PROGRESS
- Double click on document
- Select open
- Click save

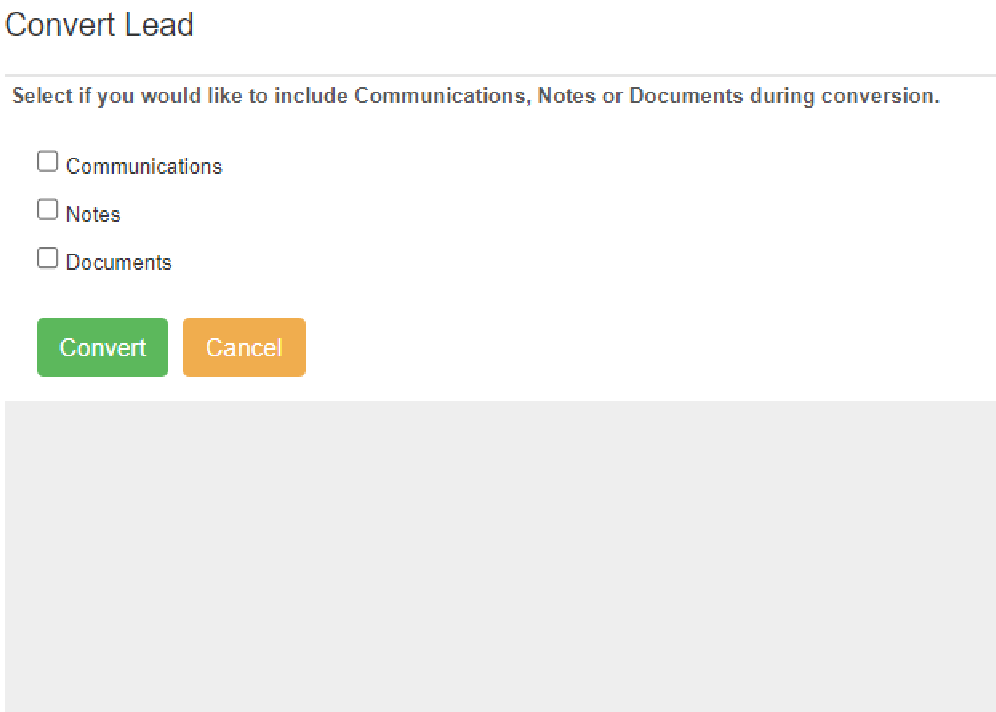


The client file needs to be converted to client

- Click convert to client



The following page displays

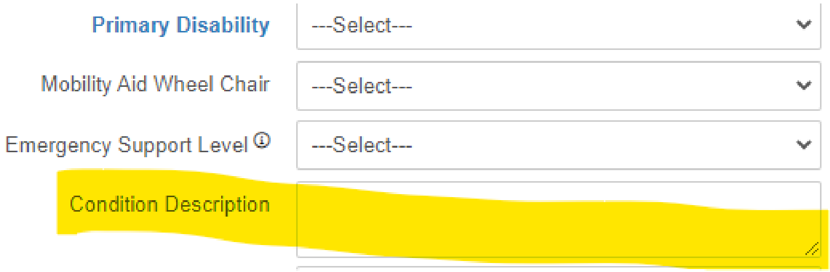


- Click all three boxes – if you don't click the boxes you will get an error note in red telling you what needs to be added (most times will be the service booking item hasn't been added or completed correctly)
- Click convert
- Click OK and OK again

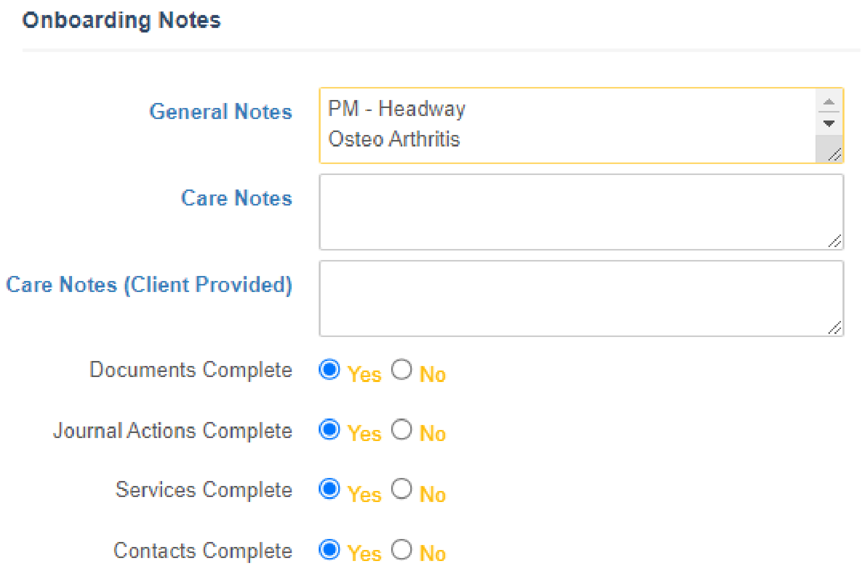
Client screen will now appear and have options for you to complete the remainder of the client set up including filling out the intake questions you have asked the client in the first instance.

Start at the top and work your way down the screen, ensuring you fill out all details possible to adhere to audit and compliance. Complete all asterisk sections, and any other sections that you deem relevant such as preferred name.

- Title drop down
- Gender
- Preferred support worker (if applicable)
- NDIS Number – ensure this is correct from NDIS plan
- Statement preference (discussed at intake how would the client like to receive their monthly plan management statement – if plan managed)
- DOB
- Family Status drop down
- Living arrangements – relates to specifically if alone (no other dependants) or in a Supported independent living (SIL)
- Registered to vote
- Indigenous
- Primary Disability drop down (if not listed the add to the condition description box)



- Mobility aid (do they use a wheel chair)
- Emergency support level (always NONE if plan managed), 1:1 and SC will require a support level and can be confirmed by engagement coordinator
- Onboarding notes to be completed to include who the plan manger is and the clients disability



Complete the clients address details in “contact details”

Always include an email unless they advise they prefer another form of contact

- Click save now

- Continue from where you were at the "related contacts" section
- Click the plus to add emergency contact person if applicable.

It will open the below screen

HEADWAY GIPPSLAND INC.

Save Close

On this form: Client Contact details

Client Contact details

Client Contact details

Client*	Agustin, Gina - 9377
Title*	---Select---
First Name*	
Last Name*	
Date of Birth	
Date Of Birth Is Estimated	Yes No
Age	
Relationship*	---Select---
Emergency Contact*	Yes No
Is Primary Carer	Yes No
Language Spoken	
Interpreter Required	Yes No
Lives With Client	Yes No
Priority	
Assists Client With	
Remarks	

Address

Address 1	
Address 2	
Suburb	
State	
Post Code	

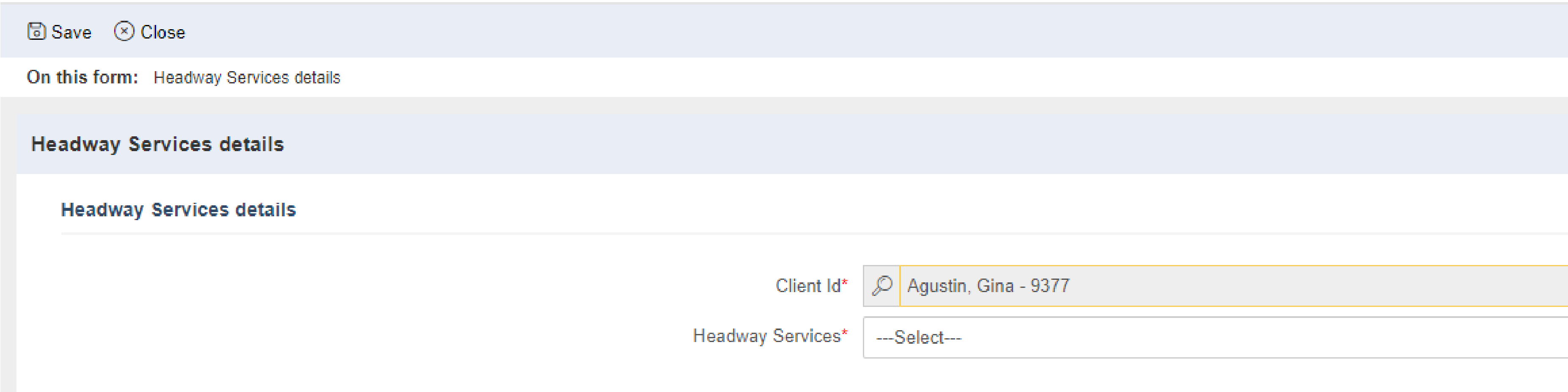
Contact

Preferred Contact Method	---Select---
Home Phone	
Mobile Phone	
Work Phone	
Email	
Call After Hours	Yes No
Call In Business Hours	Yes No

- Complete asterisk items and always include a phone number and/or email
- Click Save
- Click close
- Complete intake questions – include as much detail as possible

Scroll to the top and complete the ride hand side of the screen as follows

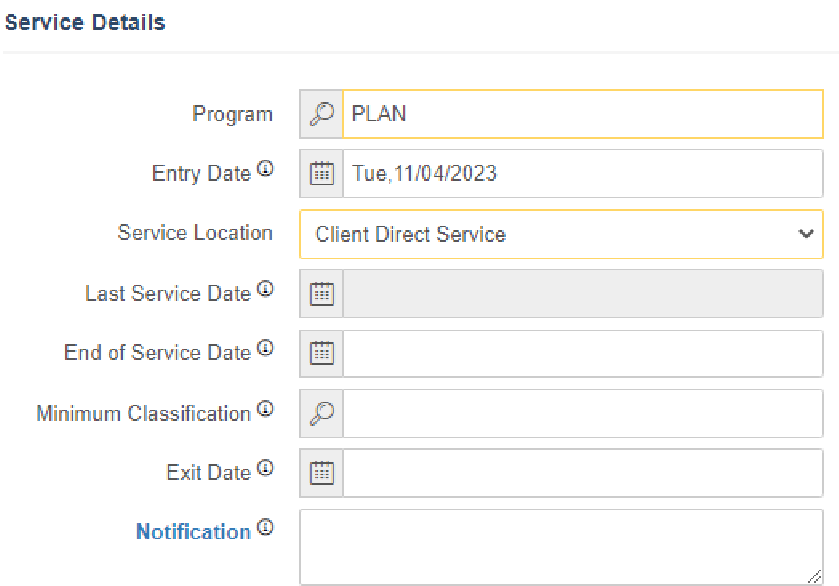
- Headway Services
- Click plus sign



Click drop down “headway Services” and select the service appropriate, if utilising more than 1 service then complete this step for each service after clicking save. Multiple items can not be selected in the drop down menus.

- Click Save

- Click Close
- Service details
- Program relates to the service – if plan managed its PLAN, if they receive SC and PM then always use program SC



- Entry date is the date you are entering details.
- Service location related to direct service always

Now you MUST deactivate the Client Funding record – this section is not used for a Plan Managed only client.

It will automatically be set up from converting the client from your quotes section.

- Double click client funding line item

Client Funding

Name	Funding Source	Type	Start Date	End Dat
Agustin, Gina - 9377 - PLAN	PLAN	Individual	04-04-2023	07-03-202

- Click Deactivate
- Click close
- Click save on main client screen

Client is now set up – you need to add client funding following the procedure for which service is being added. i.e. plan management funding.

Client checklist also needs to be completed – follow client check list procedure