SD - Intake Process's

Contents

SD - Intake Process's

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
- V:\Client Services - Headway Documents\DOCS - IN PROGRESS
- Discuss intake questions – always ask for primary disability – put this into the intake referral notebook.

Open Brevity

Click Client tab

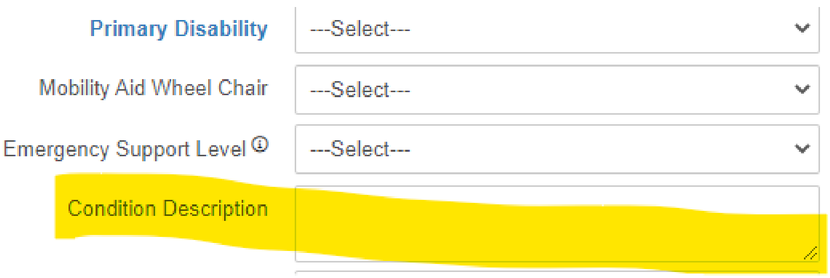
Click New

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

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)
- Citizenships
- Indigenous
- Primary Disability drop down (if not listed the add to the condition description box)

SD - Intake Process's



- 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

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

SD - Intake Process's

Save Close

On this form: Client Contact details

Client Contact details

Client Contact details

Address

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	

Contact

- 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, if they are only wanting plan management stop at the section as shown below

PM Questions Stop Here

PM Questions Stop Here	Questions below not needed for PM clients

Supports

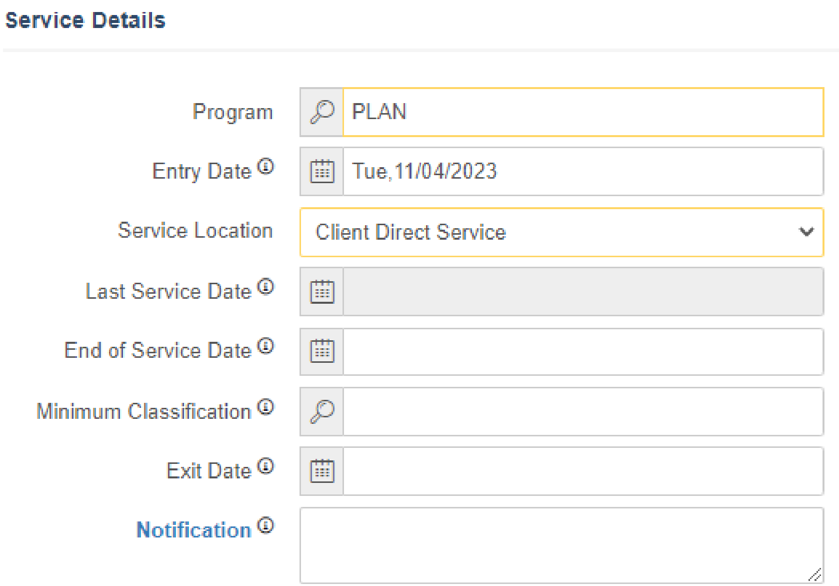
SD - Intake Process's

If they are wanting 1:1 supports, Support Coordination, Homecare and or Social Support Groups please completed all intake questions past the above section.

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

- Headway Services click the service they are wanting to yes.

- 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

If they are wanting all support except Plan Management follow the Set-up Client funding Procedure

Add client goals to the client goal section on the lower right side of the client screen.

Once all these steps are complete save and close the file.

SD - Intake Process's

Obtaining consent – adding notes

- Complete intake over the phone or in person with participant/nominee.
- Notes to be added to notes tab on main client screen in Brevity., and to the checklist section under Headway Services Consent – add plan end date and mark as complete.

  Template to be used as below.

Preparation of Intake Documents

Intake documents including Service Agreement outlining Schedule of Supports prepared for plan dated (Start Date) to (End Date)

Verbal consent given by (name & relationship to participant) to provide/continue Headway Gippsland services for Plan Management/Support Coordination/1:1 Supports and for Headway Gippsland to liaise with other people/organisations as per listing contained in Service Agreement.

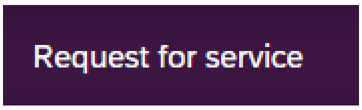
Welcome Pack including Participant Handbook, About us, Compliments/Complaints, Plan Management Local Service Providers and Plan Management Consumer Information sent by email/mail.

Documents emailed/posted to (name & relationship to participant) to be reviewed and signed, writer to follow up if documents are not returned within 2 weeks.

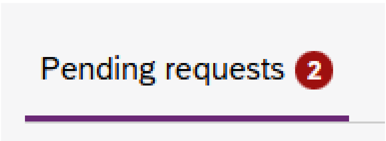
Request for Service

A request for service is often submitted through PRODA by NDIA for headway to become the Support Coordinator or renew support coordination of a current client.

- Open PRODA
- Log in with credentials follow the 2-step verification
- Click on my Ndis provider portal
- Click on the box Request for Service



- If there is anything requiring attention, it will look like the below picture



- We should also receive an email from Finance advising there is a new Request for Service sitting there.

You then will click on the highlighted numbers under request ID, and it will give you some information that you send onto the Support Coordination Manager and the Support Coordination Assistant to find out if they wish to accept or reject the RFS

Please refer to the intake and Support Coordination process for more details.

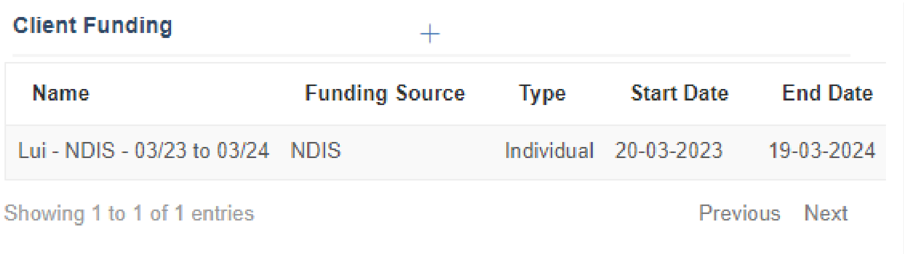
Adding Client Funding

This is for support coordination, 1:1 support work, Home Care and SSG social support groups.

- Open Brevity
- Open Client Tab
- Select Client
- Search for the client with either first or surname.
- Double click on client name

File needs to be double checked for compliance.

- "Support Workers" need to be linked and updated with current employees only.
  Please use this for support coordinators. Engagement Coordinator will update the link for their own LSO staff
- Find client funding on right hand side of the main client screen


Client Funding

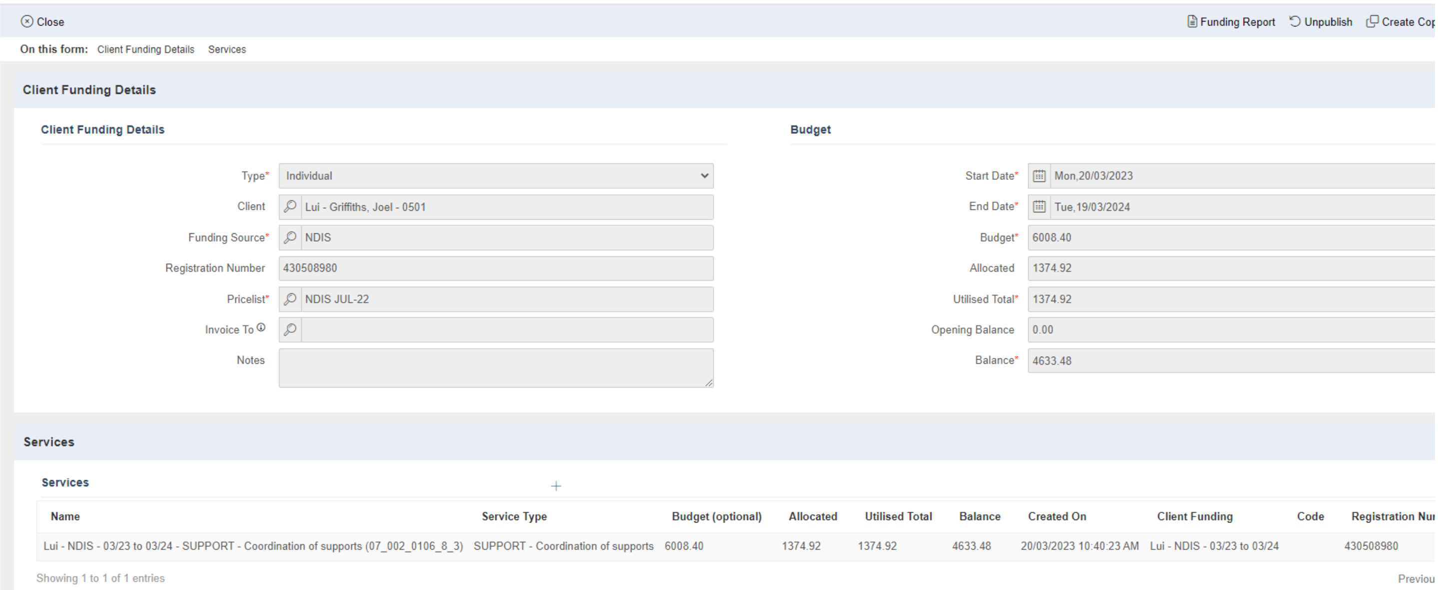
Name	Funding Source	Type	Start Date	End Date
Lui - NDIS - 03/23 to 03/24	NDIS	Individual	20-03-2023	19-03-2024

Showing 1 to 1 of 1 entries   Previous   Next

- If you are updating the file with a new plan then double click the funding record to open it.
- If you are entering a new funding record follow the steps to add the funding in the next section.

HEADWAY GIPPSLAND INC.

SD - Intake Process’s


Close

Funding Report | Unpublish | Create Cop

On this form: Client Funding Details Services

Client Funding Details

Client Funding Details

Type*	Individual
Client	Lui - Griffiths, Joel - 0501
Funding Source*	NDIS
Registration Number	430508980
Pricelist*	NDIS JUL-22
Invoice To	
Notes	

Budget

Start Date*	Mon,20/03/2023
End Date*	Tue,19/03/2024
Budget*	6008.40
Allocated	1374.92
Utilised Total*	1374.92
Opening Balance	0.00
Balance*	4633.48

Services

Services

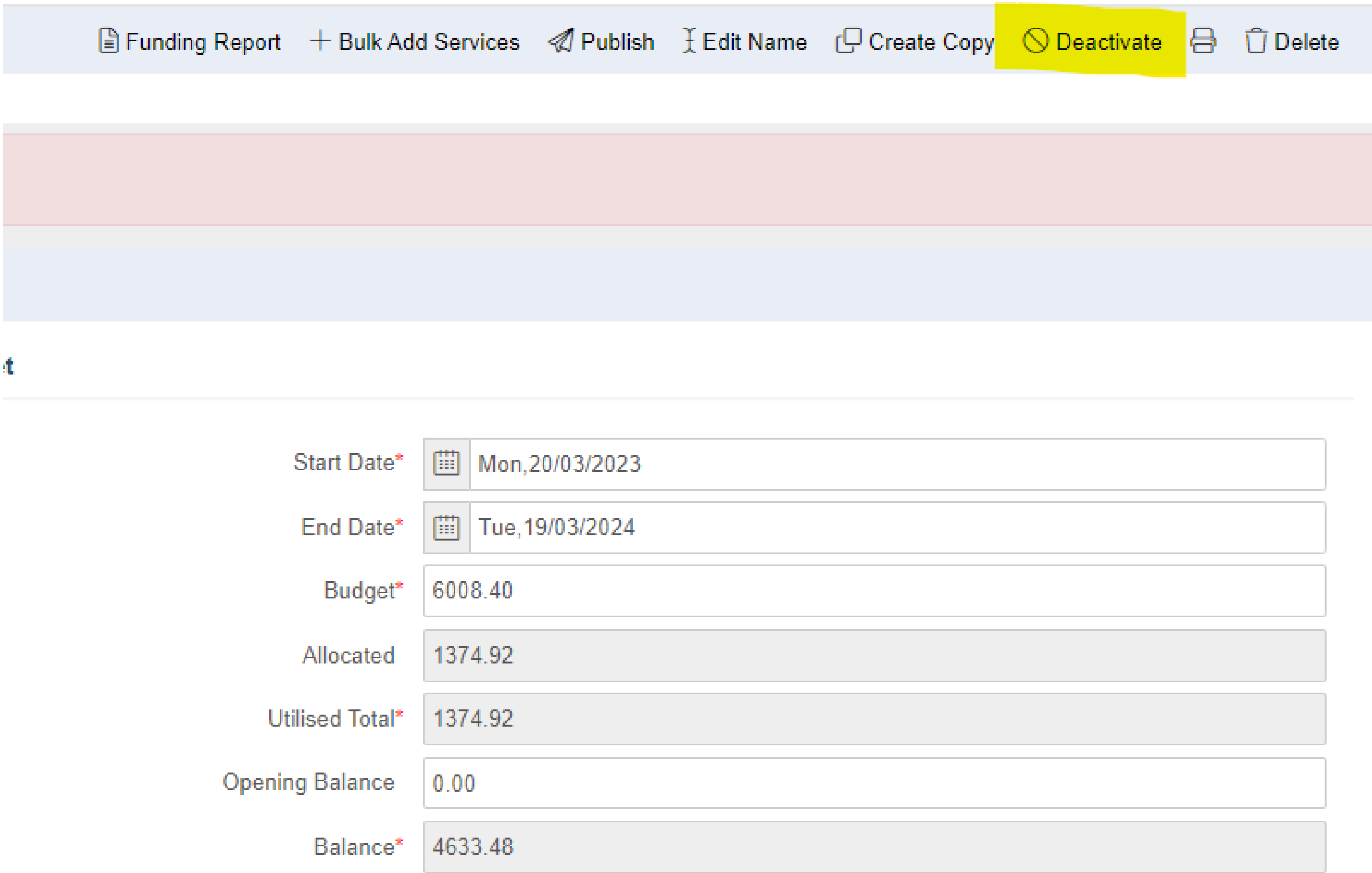
Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	Created On	Client Funding	Code	Registration Nu
Lui - NDIS - 03/23 to 03/24 - SUPPORT - Coordination of supports (07_002_0106_8_3)	SUPPORT - Coordination of supports	6008.40	1374.92	1374.92	4633.48	20/03/2023 10:40:23 AM	Lui - NDIS - 03/23 to 03/24		430508980

Showing 1 to 1 of 1 entries

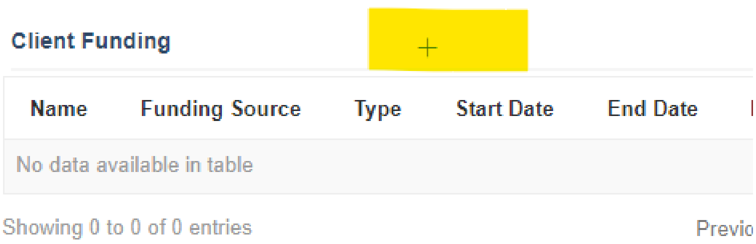
Previou

Funding needs to be unpublished and deactivated.

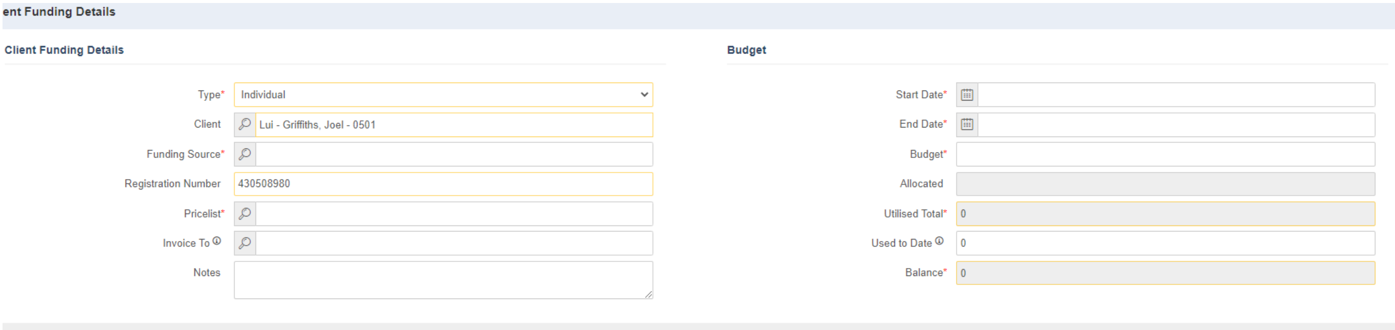
- Click unpublish
- Click ok
- Click deactivate



- Click Save
- Click close (this will finalise the deactivation.
- Click save on main client file.
- Scroll back down to the client funding record section
- Click the plus sign



SD - Intake Process's


ent Funding Details

Client Funding Details

Type*	Individual
Client	Lui - Griffiths, Joel - 0501
Funding Source*	
Registration Number	430508980
Pricelist*	
Invoice To	
Notes	

Budget

Start Date*	
End Date*	
Budget*	
Allocated	
Utilised Total*	0
Used to Date	0
Balance*	0

- Complete the required fields based on the NDIS plan
- If the funding line item you are loading is for social community access then the funding source will relate to how the funding is managed i.e. plan managed or NDIA managed

My Core Supports funding will be:

- $60,203.04 Plan-managed

OR

If you are loading support coordination funds check how this funding is managed to ensure you are selecting the correct funding source.

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

My Stated Supports funding will be:

- $12,016.80 NDIA-managed
  Level 2: Coordination Of Supports

- Click funding source
- Options will show as a list. Select appropriate based on service as mentioned above. Plan managed funding is PLAN, NDIA managed funding is NDIS, Support Coord funding that is plan managed will also be PLAN and have an "invoice to" section to be included. i.e. headway Gippsland.
- Click which source you require

- Click price list
- Select most recent

Pricelist* NDIS JUL-22

- Enter start date as the NDIS plan start date
- Enter end date as the NDIS plan end date
- Budget is what is shown on NDIS plan

60 hours of Support coordination to support me to connect to, engage with and coordinate my chosen service providers.

My Stated Supports funding will be:

- $12,016.80 NDIA-managed
  Level 2: Coordination Of Supports

- Click save

Now you will need to enter the service

- Click on the plus in the services section

Services

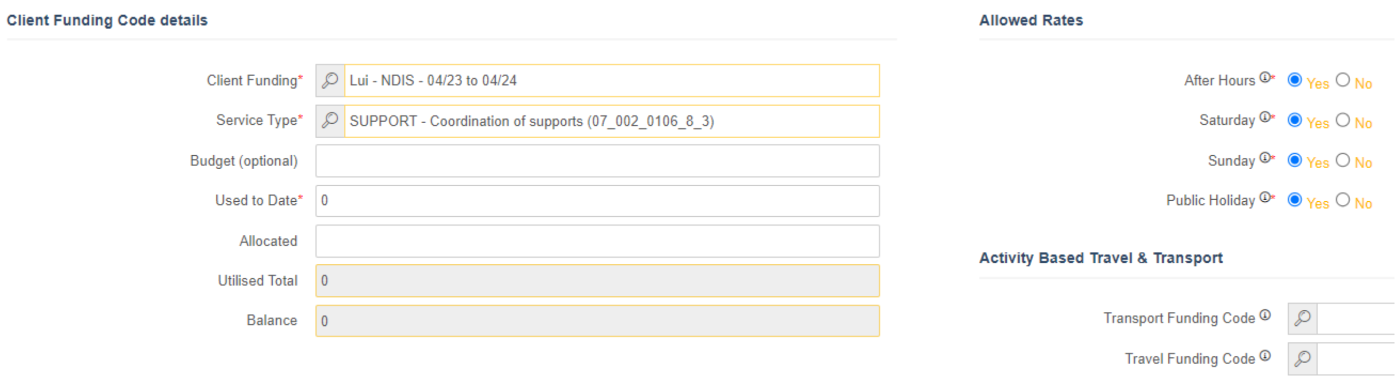
Services +

Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	Create
No data available in table						

Showing 0 to 0 of 0 entries

- Click service type (this relates to the service being provided. i.e. coordination of supports)

SD - Intake Process’s



Client Funding Code details

Client Funding*: Lui - NDIS - 04/23 to 04/24
Service Type*: SUPPORT - Coordination of supports (07_002_0106_8_3)
Budget (optional):
Used to Date*: 0
Allocated:
Utilised Total: 0
Balance: 0

Allowed Rates

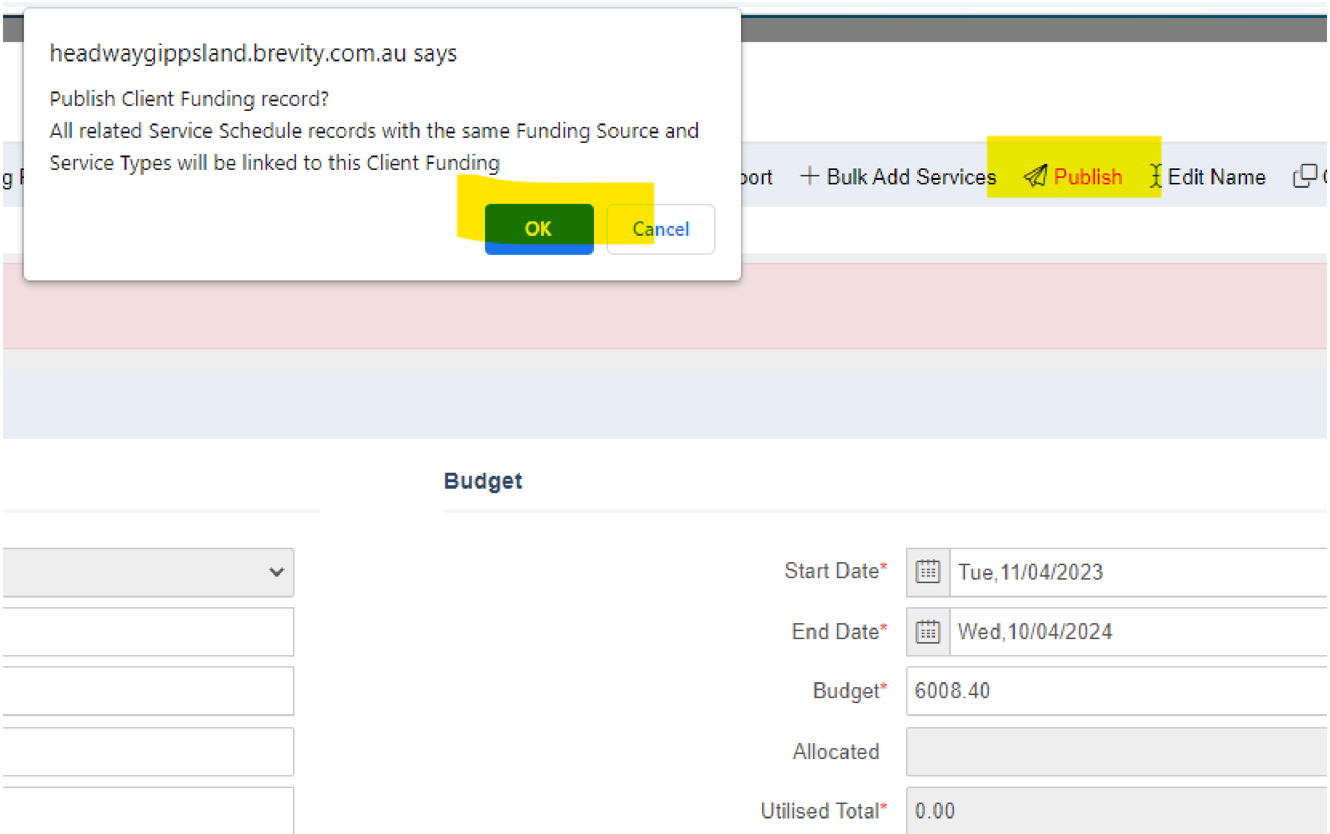
After Hours: Yes No
Saturday: Yes No
Sunday: Yes No
Public Holiday: Yes No

Activity Based Travel & Transport

Transport Funding Code
Travel Funding Code

- Enter budget as per NDIS plan
- Click the yes buttons on the right-hand side for billing purposes. (for 1:1 Supports applicable)
- Click save
- Click close
- Click save on main funding
- Now publish the funding
- Click publish

SD - Intake Process’s



- And click OK
- Click close

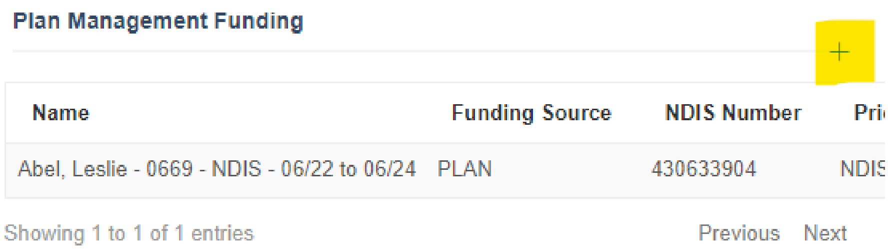
Adding Plan management funding

Open Client file – enter client first name or last name

Double click on client name

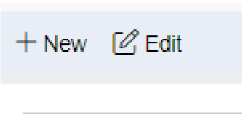
Find Plan Management Funding – right side of the screen half way down

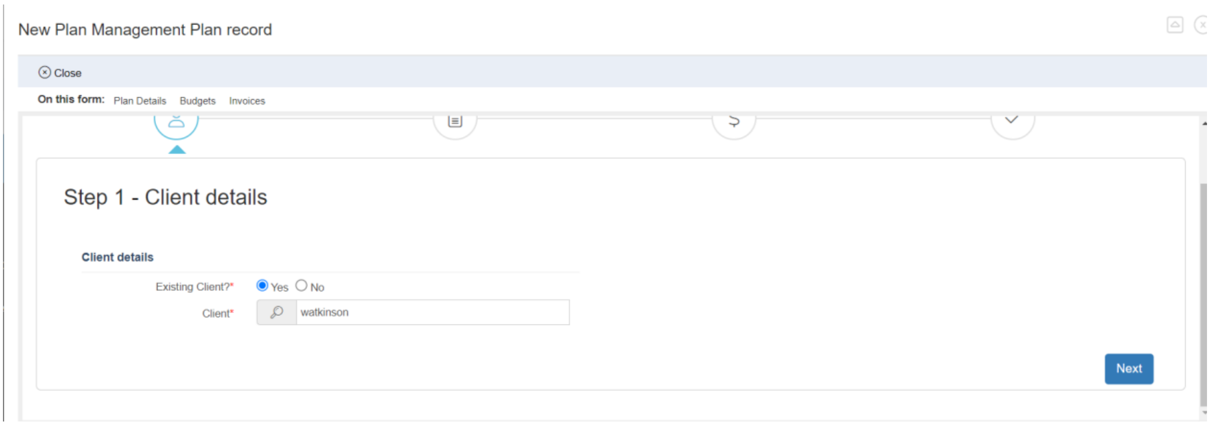
Click on the plus in the right corner (shown below)



SD - Intake Process's

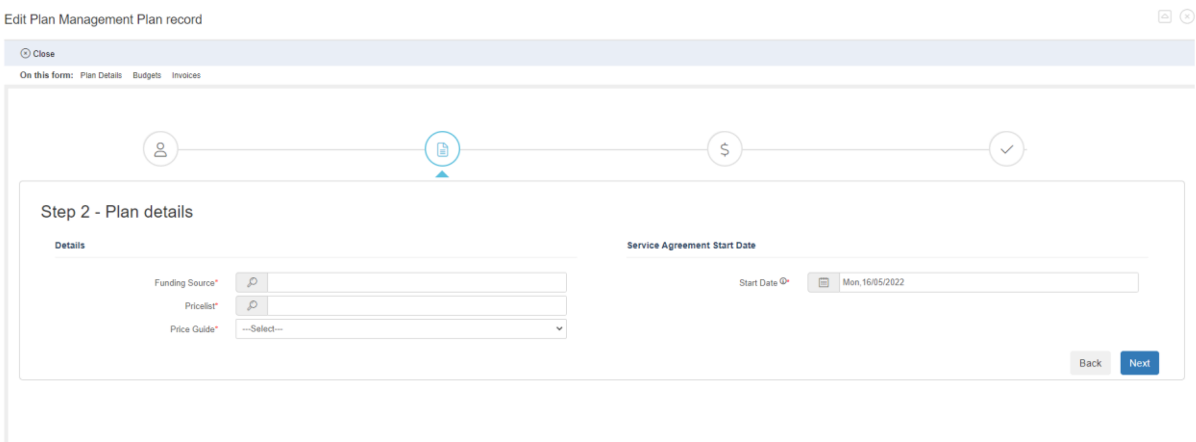
1. Click new



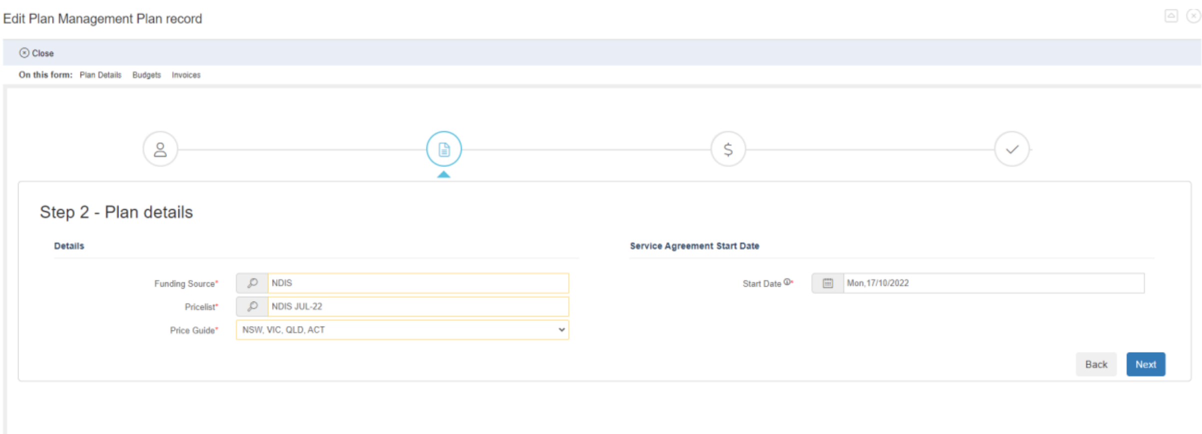


2. Enter client name (as above)

SD - Intake Process's

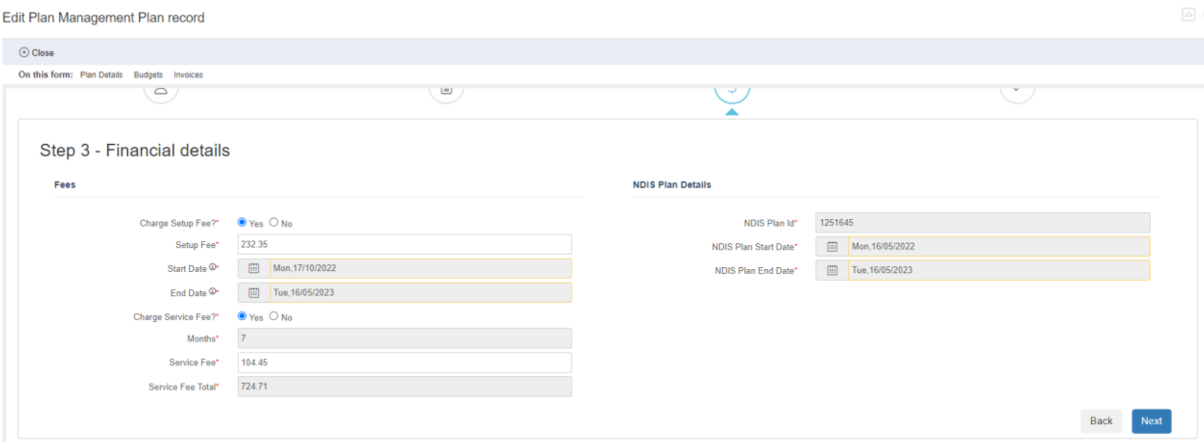


3. Funding source – relates to what services your loading for the client. At the moment we only use this section for plan management so the funding source will always be PLAN
4. Pricelist – refers to current list. i.e. Jul 22
5. Price guide – state your located i.e. VIC (NSW, VIC, QLD, ACT)
6. Service Agreement start date – Brevity automatically picks up the dates from PACE.
7. Completed below –



8. Click Next

SD - Intake Process’s

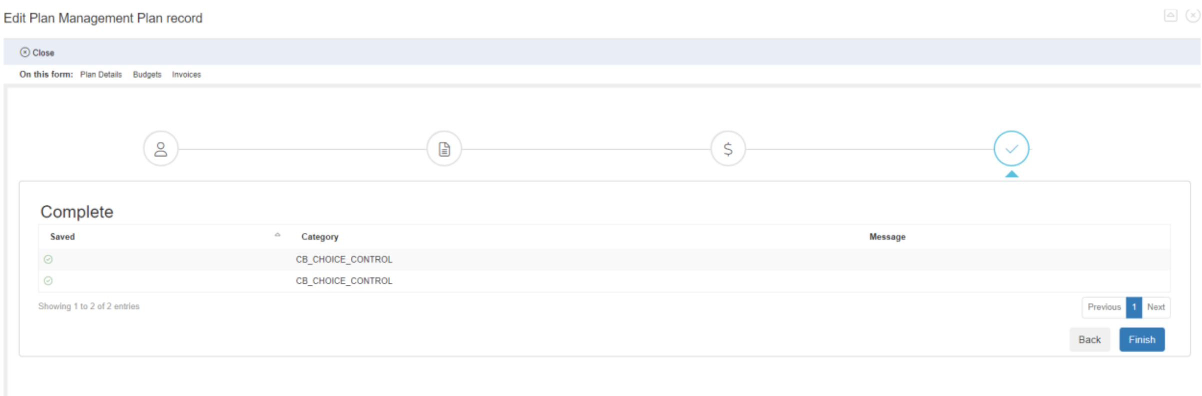


This section pre-populates.

Check that charge set up fee line is marked as “YES”

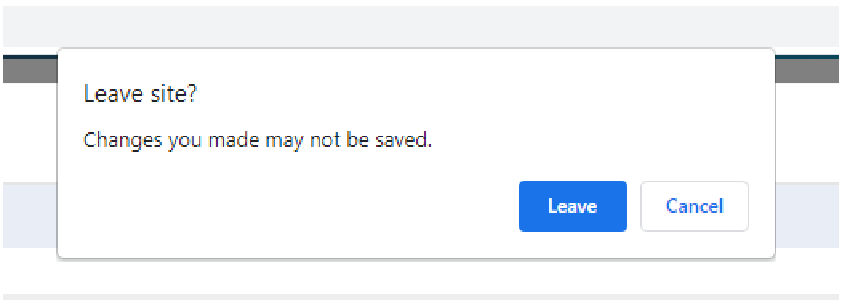
Check that Charge Service Fee line is marked as “YES”

Click Next



This screen is advising of the charges for both service and set up

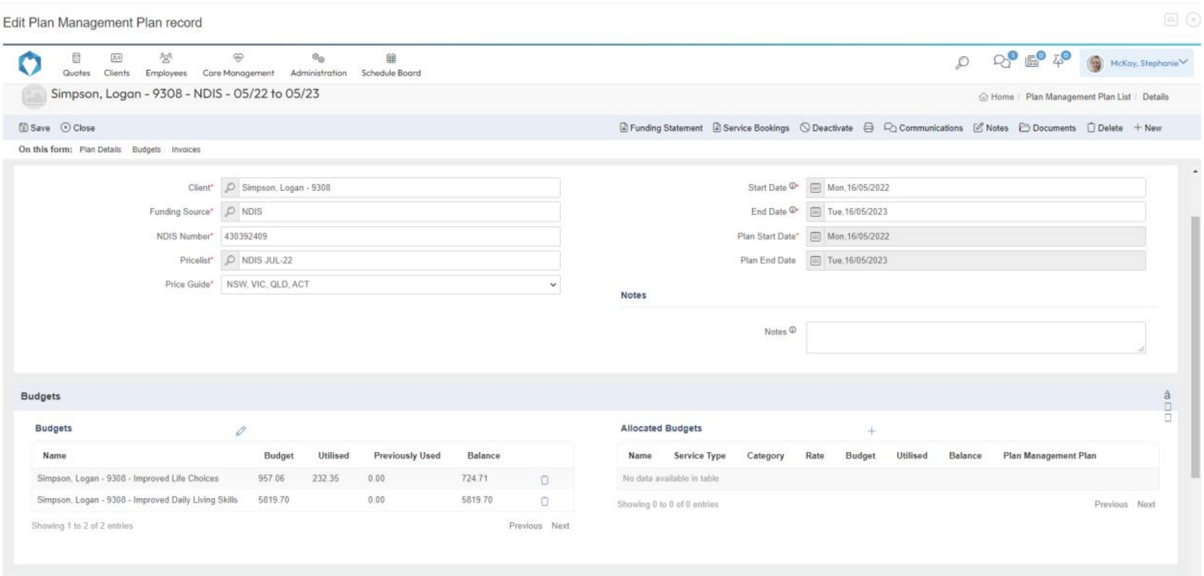
Click Finish



SD - Intake Process’s

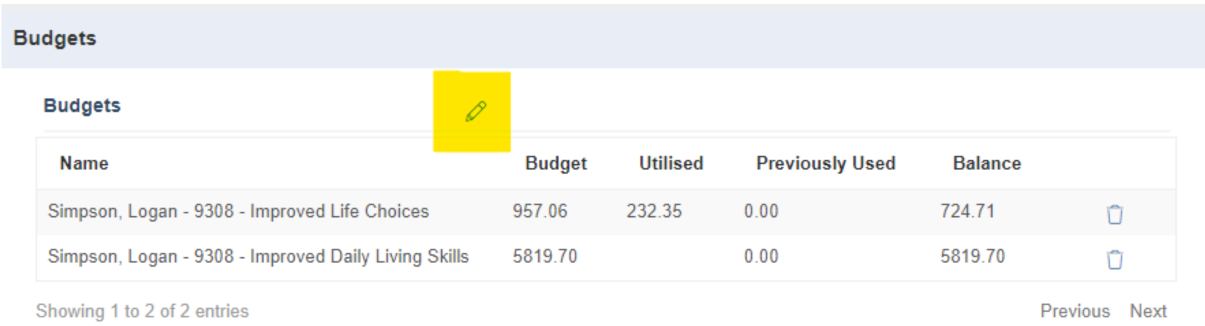
Select Leave

You will now see the funding screen for the clients NDIS plan.



Click the pen on the budget to alter the line items to match the NDIS plan and ensure funding is split across the consumables, daily activities, and social comm access line items to meet the client plan needs. (unless the client has a PACE plan, then this is automatically aligned)

See below



Budgets

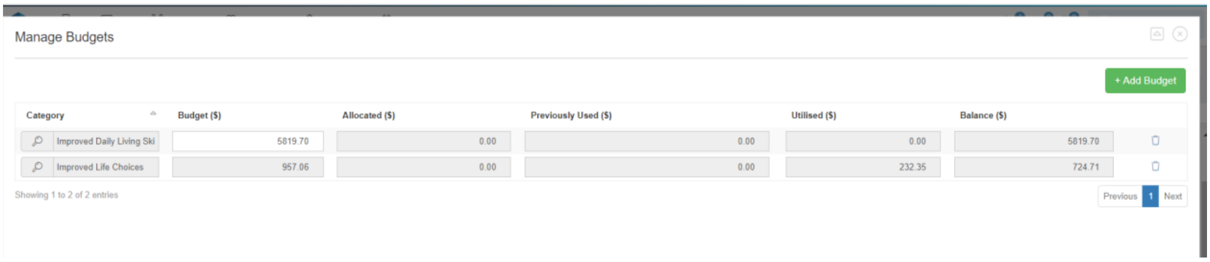
Budgets

Name	Budget	Utilised	Previously Used	Balance
Simpson, Logan - 9308 - Improved Life Choices	957.06	232.35	0.00	724.71
Simpson, Logan - 9308 - Improved Daily Living Skills	5819.70		0.00	5819.70

Showing 1 to 2 of 2 entries Previous Next

![HEADWAY GIPPSLAND INC.]

SD - Intake Process's

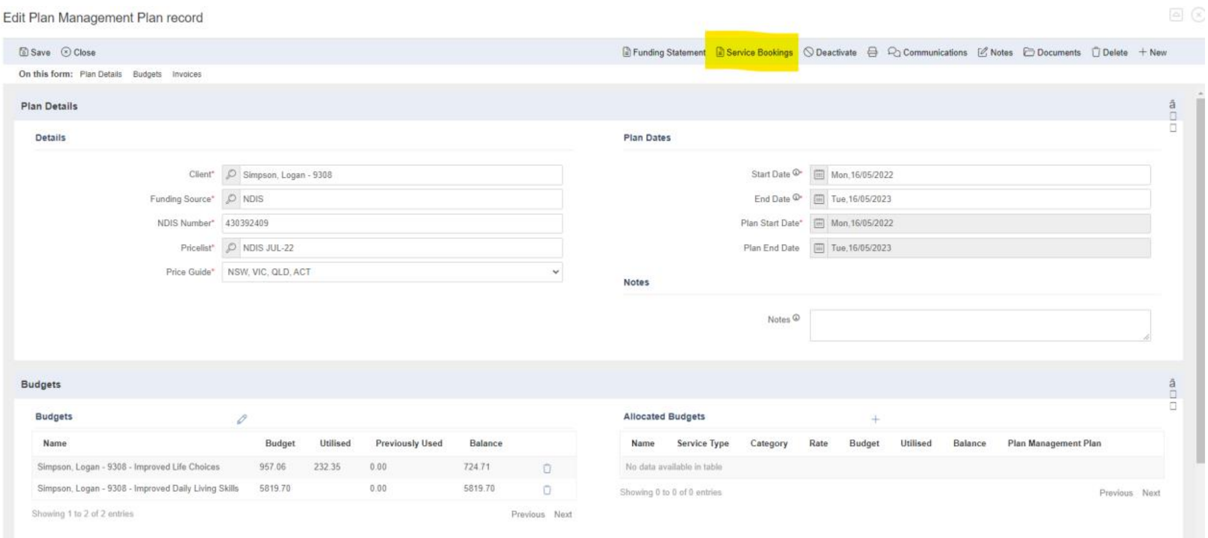


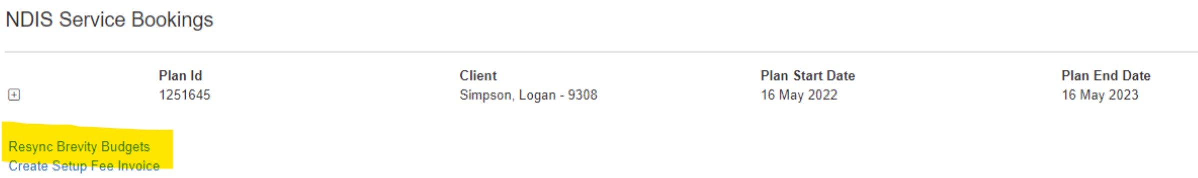
You can add a line item if it hasn't appeared by clicking the green +Add Budget button on the top right corner of the screen (see above)

When finished, click Save

Then, close

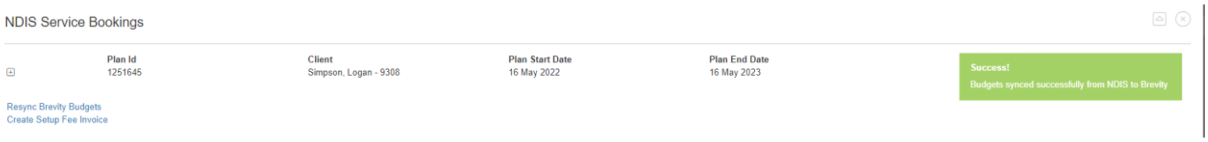
Check that the clients funding has synced to PRODA by managing service booking on the plan management funding screen





Click Resync Brevity Budgets

SD - Intake Process's



Green success box will appear in top right corner.

Click close

Click save on top left of the screen

Click Close

Now email allplanmanagement@headwaygippsland.org.au

Subject of email line should be

e.g. Logan Simpson – funding loaded 17/10/20

This is to advise the plan management team that a new plan had arrived and the date of the commencement.

Client Checklist

The 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 the 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 it 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	⊗

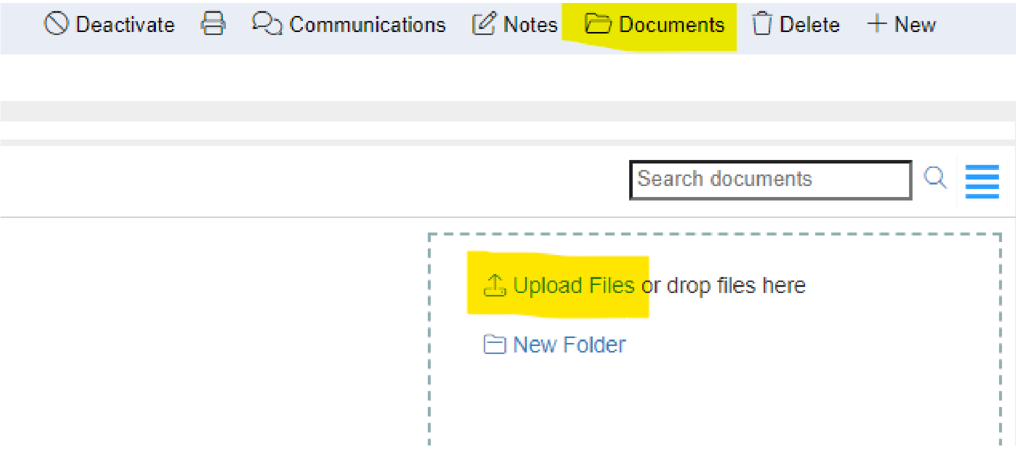
- Red cross indicates the checklist item is expired
- Green tick indicates the checklist is completed and current
- The pending circle indicates we do not have the signed document; make sure you add the plan end date.
- When an item is completed, and you have the document
- Click on the relevant line
- The below will open

Client*	McIntyre, Lynne - 0175
Item*	Service Agreement / Miscellaneous Deed
Expiry Date	Tue, 11/04/2023
Status*	Completed
Description	

To upload the document

- Click document
- Click Upload files

SD - Intake Process’s



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

“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 including Service Agreement outlining Schedule of Supports prepared for plan dated (Start Date) to (End Date)

Verbal consent given by (name & relationship to participant) to provide/continue Headway Gippsland services for Plan Management/Support Coordination/1:1 Supports and for Headway Gippsland to liaise with other people/organisations as per listing contained in Service Agreement.

Welcome Pack including Participant Handbook, About us, Compliments/Complaints, Plan Management Local Service Providers and Plan Management Consumer Information sent by email/mail.

Documents emailed/posted to (name & relationship to participant) to be reviewed and signed, writer to follow up if documents are not returned within 2 weeks.

SD - Intake Process's

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

Don't add a date to the checklist item that is not required (e.g., if a new service agreement is required, the Schedule of support is not needed, so it will be marked complete NA). Just mark it as complete and write NA.

All documents are to be added to the document section and the checklist.

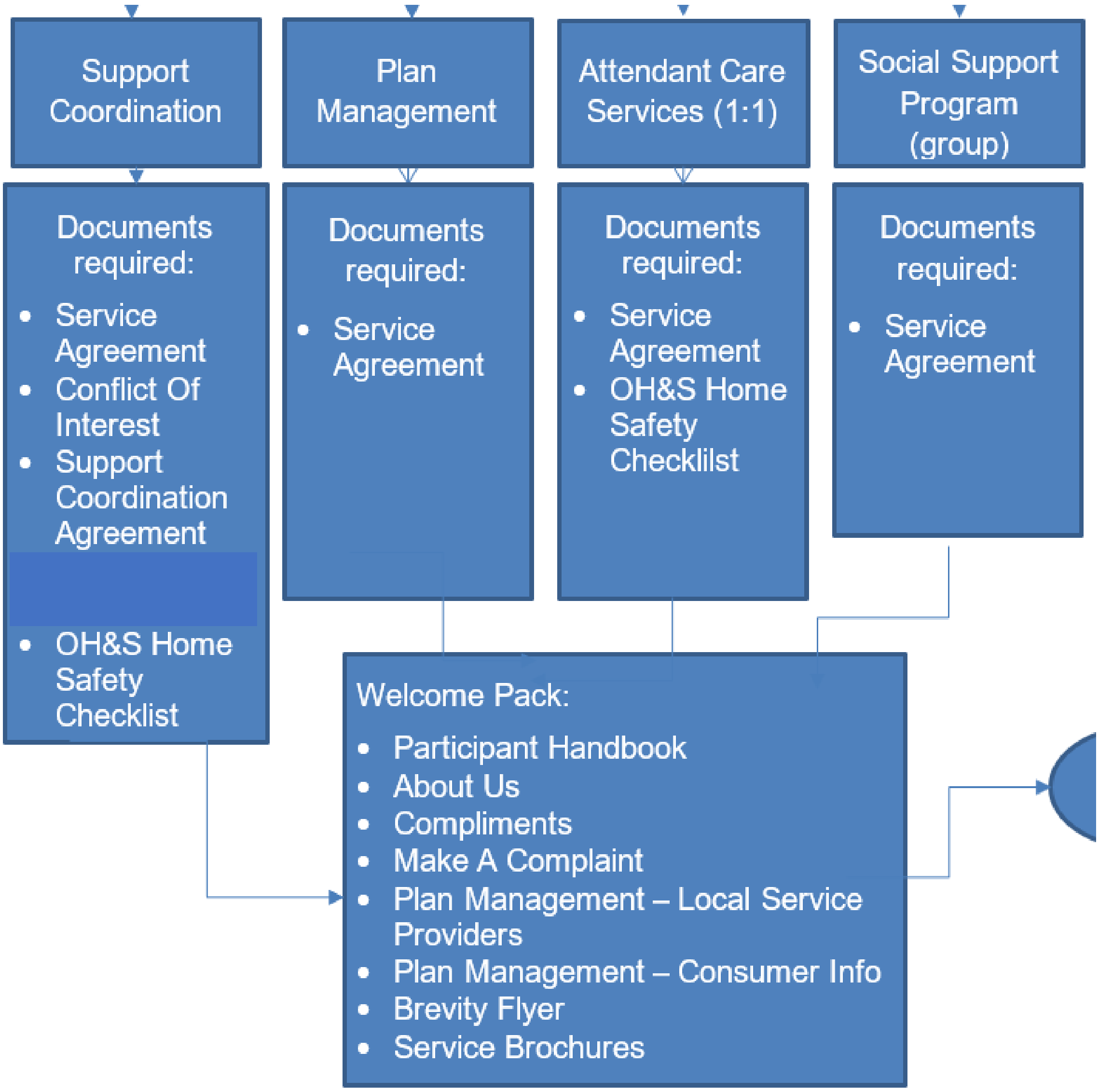
SD - Intake Process's

Prepare Documents

Follow the link below to locate the appropriate documents to what service is being provided (see Intake and referral procedure flow chart)

Support Coordination Assistant to complete the Conflict of interest, Support Coordination Agreement, and OHS checklist

Client Service Engagement Coordinator to complete Support Plan and get Life Skills Officer to complete the OHS checklist upon arrival at first shift



Q:\1-Forms

SD - Intake Process's

- Open Service agreement
- Complete all sections accordingly.
- Schedule of Supports on page 10 must include cost per line item and reflect the service being provided – See example below for all services, support coordination, plan management, 1:1 and social support groups.

14_033_0127_8_3 - Plan Management - Set Up Costs	232.35	1	232.35
14_034_0127_8_3 - Plan Management - Monthly Fee	104.45	12	1253.40
07_002_0106_8_3 - Support Coordination	100.14	48	4806.72
04_170_0136_6_1_T Group Activities 1:3 Weekday	28.75	176	5060
04_104_0125_6_1_T Access Community Weekday	64.04	192	12295.68
04_590_0125_6_1 - Activity Based Transport	1	1000	1000
	Service Total:		$ 24648.15

When you have completed the agreement, you need to follow the instructions below for posting.

- Print 2 x copies (1 is client copy, 1 is to have sign here sticker and will be headway copy)
- Prepare welcome Kit as above – this can be emailed or posted.
- Include stamped return envelope with documents and welcome kit.

If participant is a child, please address envelope to parent/nominee

HEADWAY
GIPPSLAND INC.

SD - Intake Process's

If participant has a nominee, please address envelope to nominee and post to nominee address

If participant lives alone, please address to them.

If participant requested documents be emailed to support coordinator, then please use the below template and ensure all documents from welcome kit are attached.

NDIS Plan Management Documentation

SM Stephanie McKay
To jpfalls36@gmail.com

Reply | Reply All

Form - Participant - Make A Complaint Form - Easy English - Feb_22.pdf 731 KB
SD - Participant - Handbook - Apr_21.pdf 208 KB
SD - Plan Management - Consumer Information - Jul-20.pdf 197 KB
SD - Plan Management - Local Service Providers - Jul_22.pdf 167 KB
SD - Participant - Easy English - About Us - Jan_19.pdf 2 MB
UNSIGNED Jessa Falls - Service Agreement _ March23.pdf 337 KB

Good morning Jesse

Thank you for choosing services with Headway for yourself

I have attached a documents including a welcome kit that explains some key policies with Headway.
The extra document for signing is a Service Agreement, we require this to be returned when possible.

If you have any troubles with the attached information please let me know and I can arrange to have them posted out for you.

Kind Regards,

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

Headway Gippsland

- Wording for template (please copy and paste)

  Good morning ***addressee/nominees/support coord***

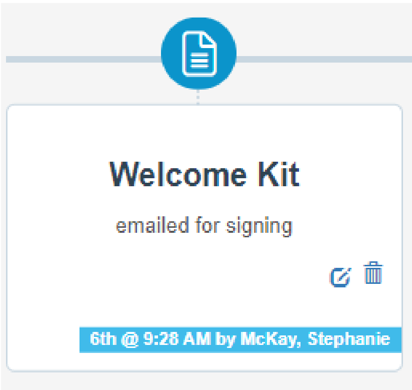
  Thank you for choosing/continuing services with Headway for ***participant name***

  I have attached a documents including a welcome kit that explains some key policies with Headway.

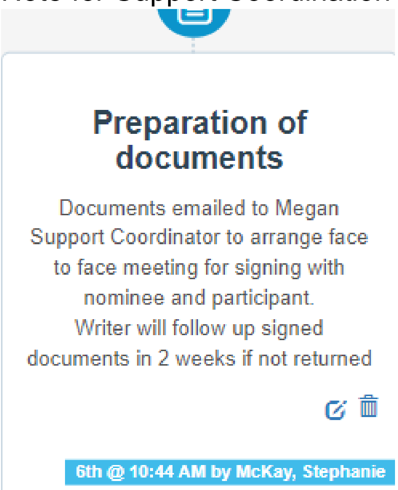
  The extra document for signing is a Service Agreement, we require this to be returned when possible.

  If you have any troubles with the attached information please let me know and I can arrange to have them posted out for you.

- Open client tab
- Click Client
- Enter client name
- Double click on client to open file
- Click notes tab
- Include note stating below



- Note for Support Coordination documents as below



- Unsigned document to be saved as UNSIGNED in the heading in the below link

  V:\Client Services - Headway Documents\DOCS - IN PROGRESS

- Upload the unsigned copy to the Client Checklist under the appropriate document list
- Upload the unsigned copy to Document TAB in the Service Agreement – Headway folder.

The Support Coordinator assistant will develop and email documents to the Support coordinators and upload them as the procedure states above.

Use the template below as your email,

SD - Intake Process's

To: Megan Mathisen;
Cc:
Subject: Documents - Sharon Watkinson

UNSIGNED Sharon Watkinson - Conflict Of Interest - Mar 23.pdf
171 KB

UNSIGNED Sharon Watkinson - Support Coordination Home Visit Risk Assessment_Mar 23.pdf
240 KB

UNSIGNED Sharon Watkinson - Support Coordination Agreement - Mar 23.pdf
232 KB

UNSIGNED Sharon Watkinson - Service Agreement _ March23.pdf
294 KB

Hi Megan,

Documents attached 😊

Kind Regards,

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

When the signed copies are returned, they can then be deleted. (in the checklist only, the document section the unsigned copies can be archived)

Checking Extended plans

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/PACE open to check if the plan has been extended or not.

SD - Intake Process's

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

Plan Management Plan List | Active pmplans ··· Home / Plan Managem

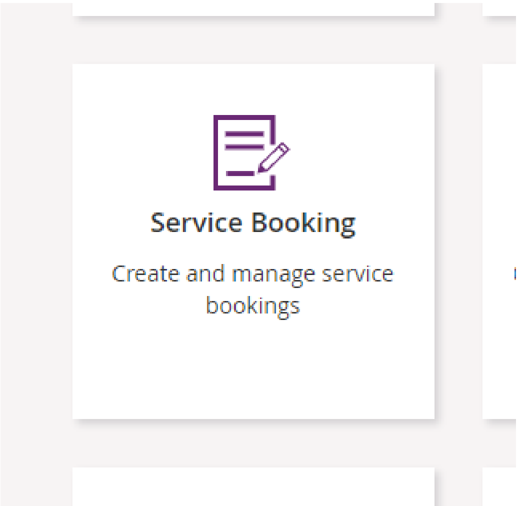
+ New Edit Invoice Processing Fee Import Invoices Import Service Bookings Resend Remittance Filter Mail Merge Import Delete

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	Panoutsopoulos, 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/PACE

- Select Service booking

For the PACE relationship – please see page 8.



- Open "view service bookings" tab

SD - Intake Process's

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
- In another tab, open the plan to see budgets and ensure these align with what I update

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

SD - Intake Process’s

- Select “update Allocation”
- Funding should be able to be duplicated – this means the NDIA has allowed the plan to be 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

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 the 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 it into the appropriate line item.

SD - Intake Process's

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

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

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

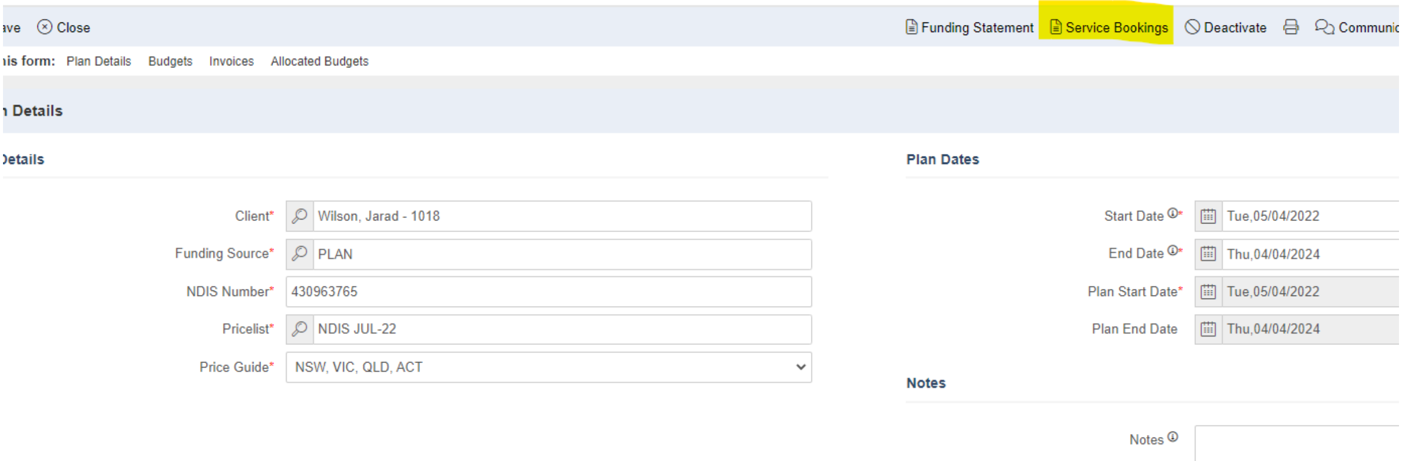
- Tick the box and submit again.

Go back to view service bookings 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 claim 1 set-up fee) and plan management funding items for core and CB budgets.

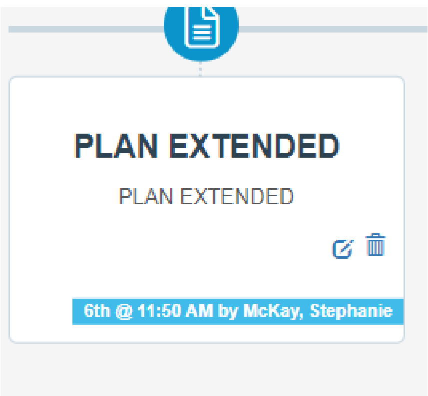
PACE SYNC APPLIED HERE - The client screen in Brevity now needs to be "synced" to pull the records from PRODA/ PACE.

- Open client tab
- Select client
- Enter client name – first OR surname
- Double-click to open the 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

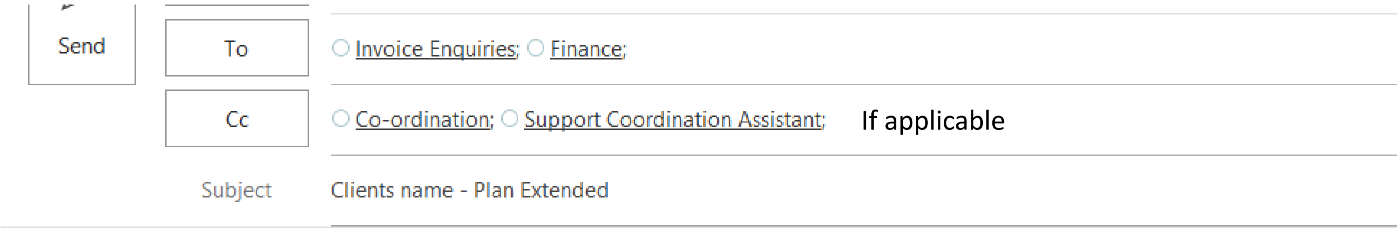


- Click "resync Brevity Budgets"
- Close
- Save and close
- Update the client checklist with new end dates
- Add client note in notes TAB

SD - Intake Process's



- Open emails
- Create new email
- Send email to Invoice enquires and finance
- See template below



Checking Ended plans

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 9:45 AM
To: Finance <finance@headwaygippsland.org.au>
Subject: Participant Plan Dates Changed

SD - Intake Process's

Hi,

Just notifying you that The End Date for plan 'Hough, Lucinda - 9223 - Pending - 04/22 to 03/23' has been changed from '07-Feb-2023' to '07-Feb-2023'

- Brevity

- Open PRODA

- Click Client Tab

Select Client

Enter the client name from the email.

Click on plan management funding, which is found on the right side of the main client screen.

If the service booking date has passed, funding needs to be amended to "pending"


Hough, Lucinda - 9223 - Pending - 04/22 to 03/23

Close | Funding Statement | Service Bookings | Activ

On this form: Plan Details Budgets Invoices Allocated Budgets

Plan Details

Details

Client* Hough, Lucinda - 9223

Funding Source* Pending

NDIS Number* 431898672

Pricelist* NDIS JUL-22

Price Guide* NSW, VIC, QLD, ACT

Plan Dates

Start Date* Wed,20/04/2022

End Date* Tue,07/02/2023

Plan Start Date* Tue,08/03/2022

Plan End Date Tue,07/02/2023

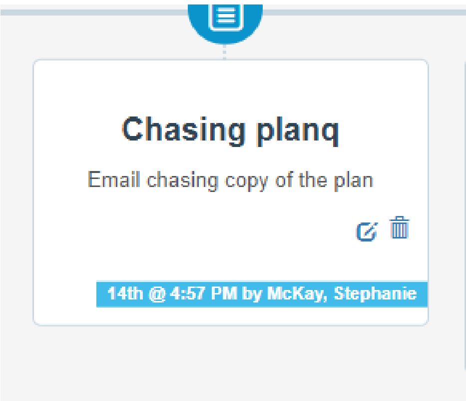
Notes

- Email or phone call is then made to the participant/nominee or Support coordinator (if one is listed) chasing a copy of the new plan.

Note to be added to notes tab top of client screen.

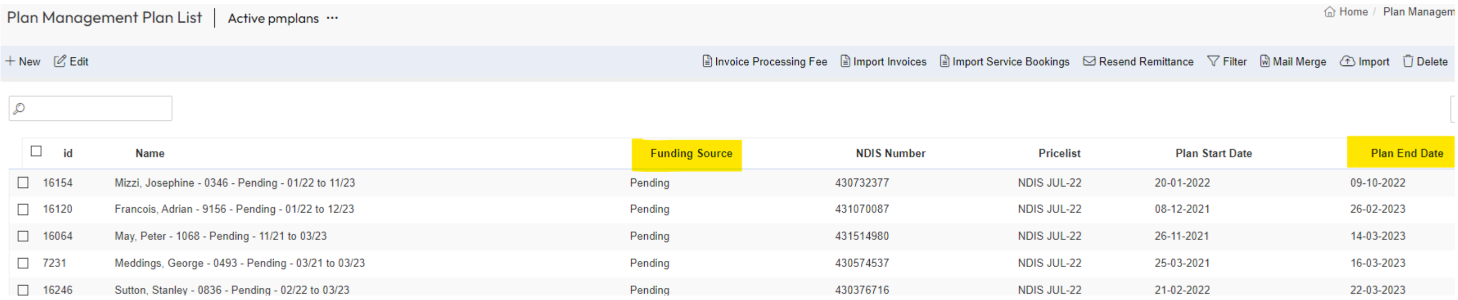
- Template to be used – "Email chasing a copy of the new plan."

SD - Intake Process's



Follow up 2 weeks later – you need to pull the report in the plan management area by searching pending plans with an old end date. See steps below

- Client Care Management
- Click plan management
- Click on the wording "plan end date" to filter by the end dates



Plan Management Plan List | Active pmplans ···

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
16154	Mizzi, Josephine - 0346 - Pending - 01/22 to 11/23	Pending	430732377	NDIS JUL-22	20-01-2022	09-10-2022
16120	Francois, Adrian - 9156 - Pending - 01/22 to 12/23	Pending	431070087	NDIS JUL-22	08-12-2021	26-02-2023
16064	May, Peter - 1068 - Pending - 11/21 to 03/23	Pending	431514980	NDIS JUL-22	26-11-2021	14-03-2023
7231	Meddings, George - 0493 - Pending - 03/21 to 03/23	Pending	430574537	NDIS JUL-22	25-03-2021	16-03-2023
16246	Sutton, Stanley - 0836 - Pending - 02/22 to 03/23	Pending	430376716	NDIS JUL-22	21-02-2022	22-03-2023

- Funding source should show pending, this will give you the list of clients you need to follow up.

No response after 2 weeks – please make client inactive and add to Excel spreadsheet – See Monthly reporting procedure

Deactivate client file – see procedure deactivate client.

If the client's plan is a PACE plan, the client will drop off PACE; we will receive the below email.

SD - Intake Process’s

From: Brevity Care Software <alert@brevitycaresoftware.com>
Sent: Friday, February 21, 2025 12:50:17 PM (UTC+10:00) Canberra, Melbourne, Sydney
To: Finance <finance@headwaygippsland.org.au>
Subject: Participant Plan Dates Changed

Hi,

Just notifying you that The End Date for plan 'Hall, Gillian - 9119 - NDIS - 06/22 to 06/25' has been changed from '04-Jun-2025' to '20-Feb-2025'

- Brevity

You will then get another email as follows

From: Brevity Care Software <alert@brevitycaresoftware.com>
Sent: Friday, February 21, 2025 1:00:43 PM (UTC+10:00) Canberra, Melbourne, Sydney
To: Finance <finance@headwaygippsland.org.au>
Subject: New Participant PACE Relationship Established

Hi,

Just notifying you that a New Relationship has been established within PACE for 'Hall, Gillian - 9119'

- Brevity

Please then follow the gain consent and load Plan Management funding procedures.

SD - Intake Process’s

Monthly Intake Report – Excel Spreadsheet

This report is to remain open on your desktop daily, it is a live document that is to be updated each time you receive

- New client
- Pending referral for a service at Headway
- Renewing NDIS plan
- Extension of a current plan
- Exits

Link for file

V:\Intake

This spreadsheet is pretty straightforward; just add the date, clients name, depending If they are PM, SC, 1:1, HC or SSG, click on the one most relevant to this client and type Extended, renewed, or new

Extended – If their plan was extended for a further year

Renewed – is a returning client with a new plan

New – new client

Then for the hours for SC, 1:1 and HC place them in the relevant boxes, as what the hours are for the month.

This spreadsheet is to be emailed on the 1st day of each month; it is to be emailed to the following departments, as seen below.

HR/Operations manager

General Manager

CEO

Support Coordination Manager

Plan Management/CRM Technical Administrator

SD - Intake Process’s

Marketing

2025 Intake Participants.xlsx
132 KB

From: intake
Sent: Wednesday, 5 February 2025 9:25 AM
To: Debbie Lee <d.lee@headwaygippsland.org.au>; Wendy Matthews <w.matthews@headwaygippsland.org.au>; Jenelle Henry <j.henry@headwaygippsland.org.au>; Nicky Levey <n.levey@headwaygippsland.org.au>; Ben Munro <b.munro@headwaygippsland.org.au>
Cc: Krista Mountford <k.mountford@headwaygippsland.org.au>
Subject: January 2025 intake

Good morning,

Please find attached January 2025 intake.

Deactivating a client file

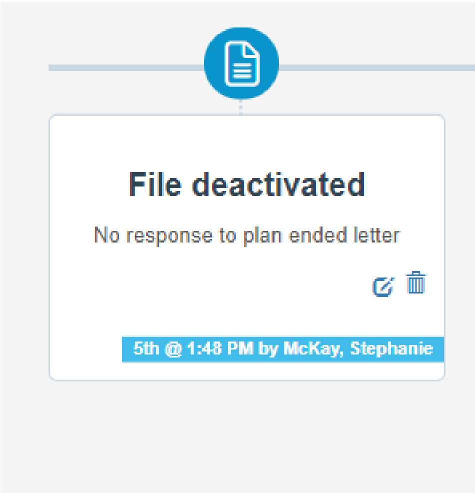
Files can be deactivated for a number of reasons

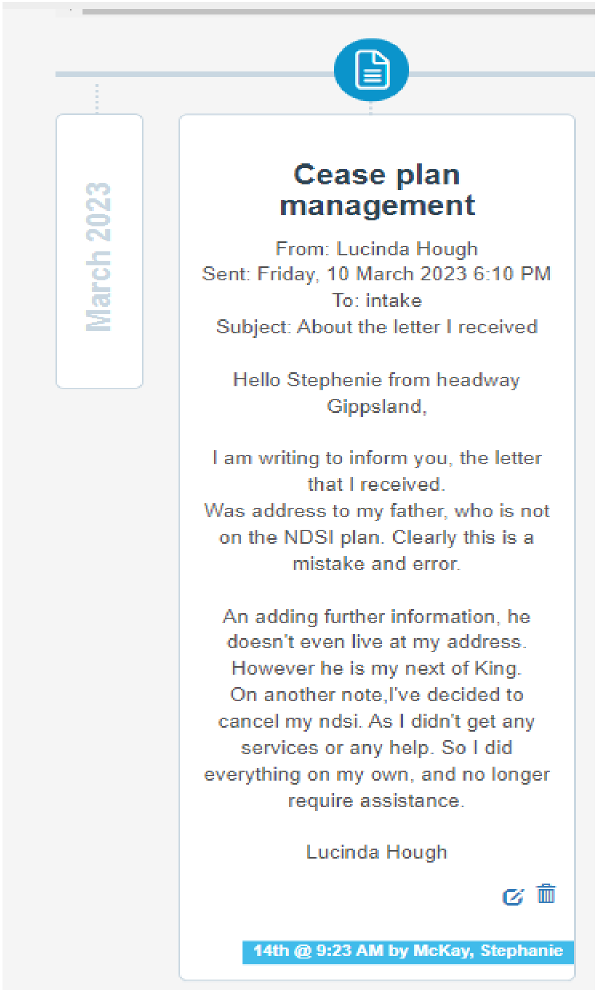
- Failure to make contact after a plan has ended
- Request to cease services
- No longer receiving NDIA funding.

Open Brevity

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

SD - Intake Process’s





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

SD - Intake Process's

Checklist

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

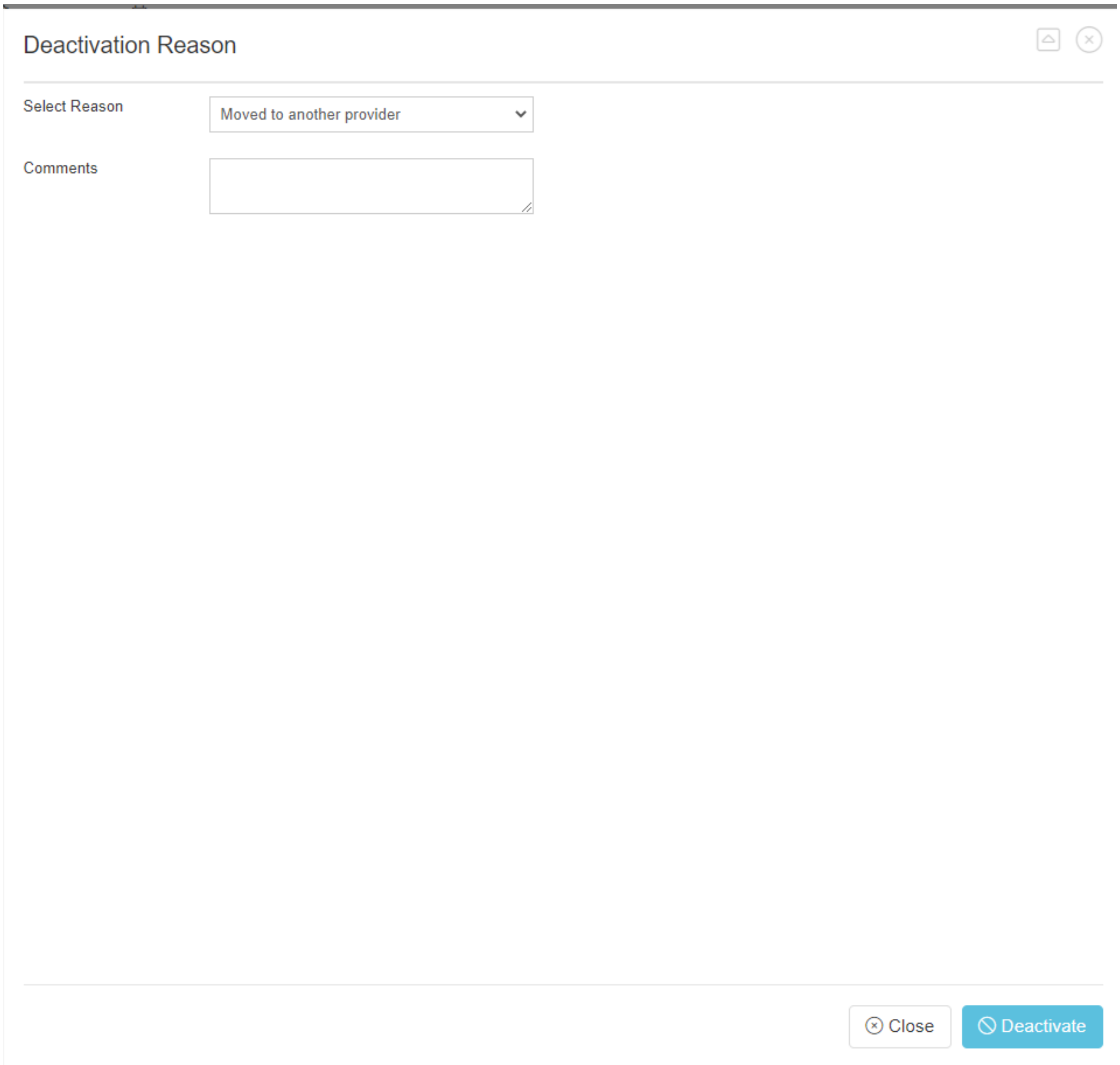
Click on each item separately and select deactivate.

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

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

Click deactivate

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



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.

SD - Intake Process's

Send

From intake@headwaygippsland.org.au

To **All Plan Management Team**; Finance; Co-ordination; (If applicable)

Cc Wendy Matthews; Debbie Lee; Krista Mountford; **All Support Coordination Team**; (If applicable)

Subject bob Jane

Good morning,

Bob would like to cease plan management/ and or Support coordination
Service booking with be closed in 30 days – (enter dates 30days from the date of exit interview)