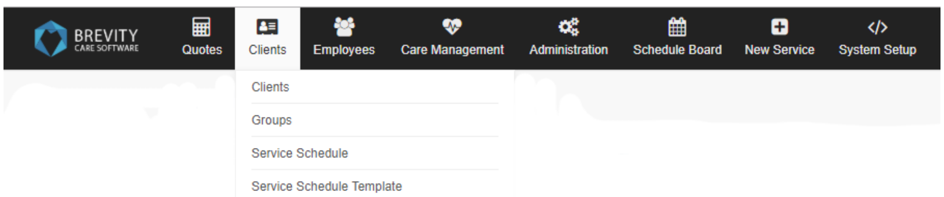
Getting Around

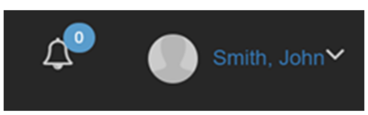
This guide will help you get around the Brevity system as well as teach you how to use the various screens and form elements to manage records within brevity.

System Navigation Bar

The system menu allows you to navigate to the various areas within the system. Most of the main menu items contain sub-menu items, which are shown when you hover over the icon on the menu:

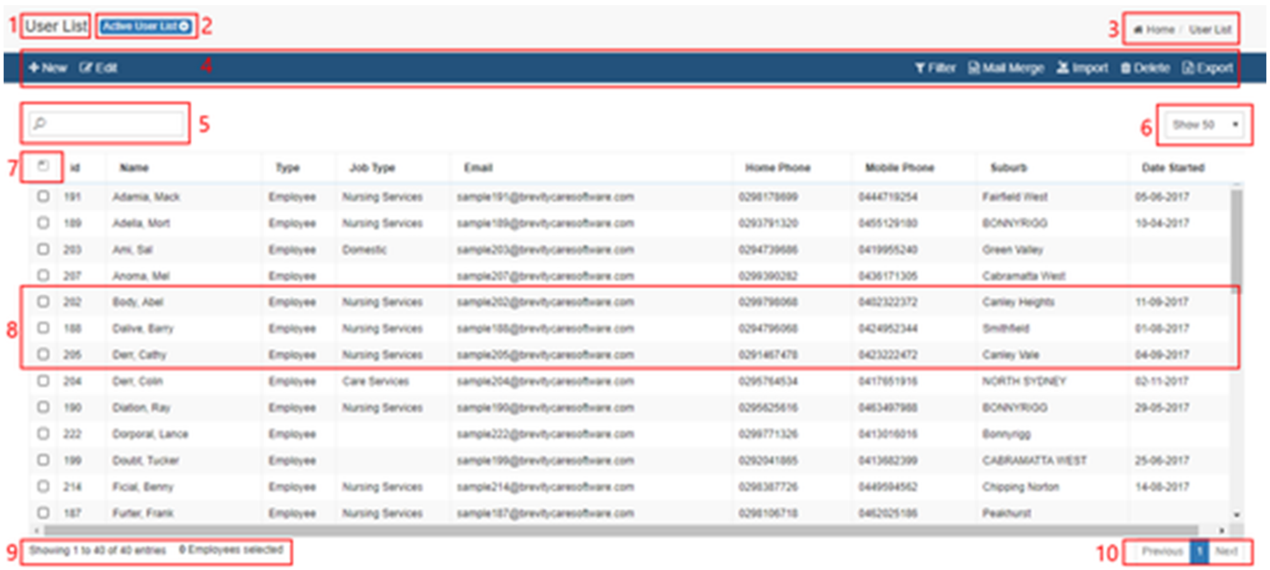


The navigation bar also has a section in the right that show alerts for the logged in user as well as the name of the logged in user, with a sub-menu that a link to logout of the system.



Record List Screens

Displays a list of records for the selected navigation item.



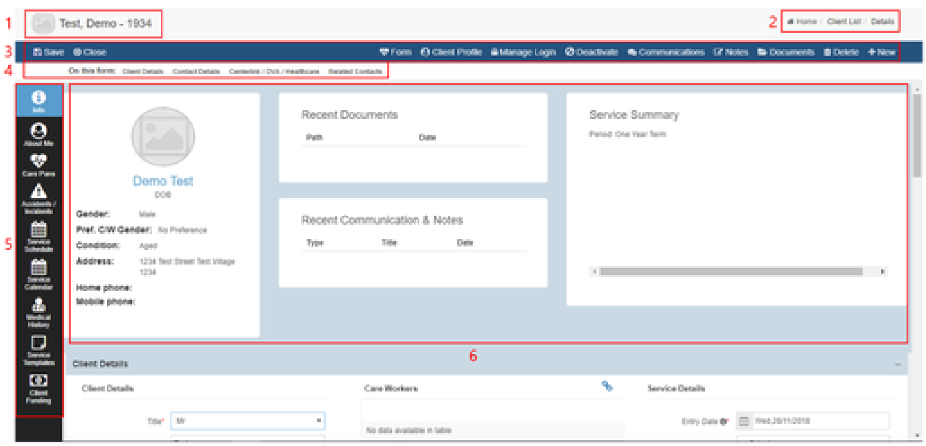
There are several action that can be taken from the list screen:

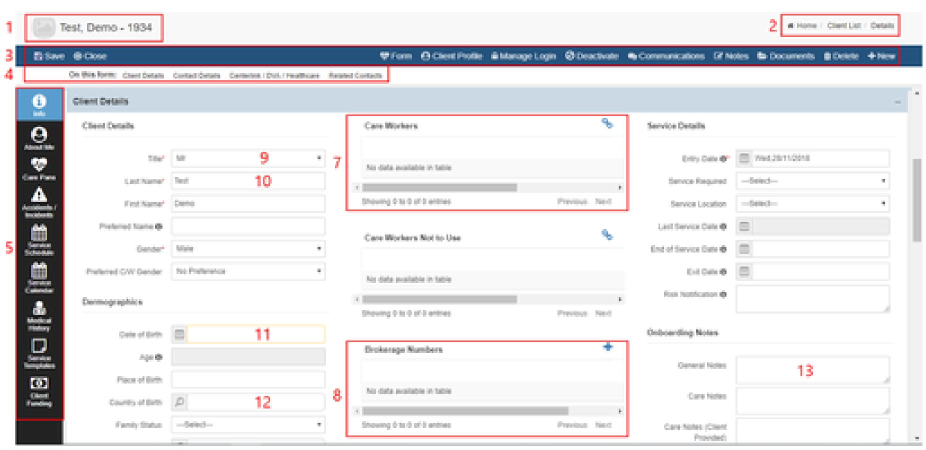
1. **Page Title:** this is the page/module title.
2. **Page views:** this has different views depending on the status or fields available in the module. You can click this button and a popup appears from where different views can be selected.
3. **Breadcrumbs:** Secondary navigation that indicates your location within application
4. **Page Toolbar:** contains action buttons like add/edit/delete records or other bulk record actions. Some buttons you will see are:
    1. **+ New:** this adds a new record for the screen/module.
    2. **Edit:** select a record in the grid and click the edit button to edit the record. You can also double-click a record in the list to edit it.
    3. **Filter:** this is used to sort the record by clicking on the attribute (eg. Name, Job Type, Email)
    4. **Delete:** deletes selected records.
    5. **Import:** allows import of data from a csv file.
5. **Records filter:** You can search through all the records using this search field, as soon as you start typing, the records are filtered and this filter applies on all the displayed columns.
6. **Paging size:** these are number of records for display that will appear on the grid without paging.
7. **Select all:** ticking this box will select all the records in the grid for use with bulk action like bulk delete, bulk confirm, etc.
8. **Records:** double clicking a record, opens the record in edit mode for changes.
9. **Paging information:** displays total number of records.
10. **Paging:** if there are more number of records that does not fit in the current grid, then page number are displayed and clicking on those, loads up records from that page.

If you want to select multiple records from the table, click on the link for the guide in selecting multiple record ([Selecting Multiple Record from the List](#))

Record Edit Screen (or Record Form)

Allows creation of new records or editing of existing records.



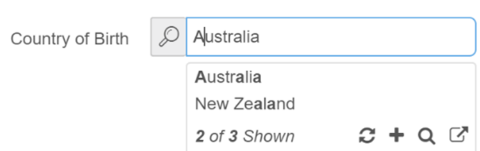


1. **Record Name:** Display the name of the current record. You can also click the image icon to upload an image for the record. This can be the photo of a client or employee for example.
2. **Breadcrumbs:** Secondary navigation that indicates your location within application
3. **Page Toolbar:** contains action buttons like save, close, add/edit/delete records or other bulk record actions. Some buttons you will see are:

   1. **Save:** Save the changes made in the account.
   2. **Close:** Close the view of the account.
   3. **Form:** Allows you to create Care Plans details
   4. **Manage Login:** Allow you to manage the login details for the mobile app.
   5. **Notes:** Create notes related to the Client.
   6. **Documents:** Allows you to upload files related to the customer
4. **Form Quick Links:** allows to just to different section on the form.
5. **Form Tabs:** Allows you to access related information for the record being viewed.
6. **Summary:** Display all the detailed information about the client
7. **Linked Related List:** Allows you to link to multiple records. To link records, click the blue link icon above the list, enter the name of the record you wish to link to, then select the record from the list to link to it
8. **Related List:** Allows you to view and add related records. The difference between this and a linked related list, is that list requires you to complete additional information via a form when adding items to the list
9. **Dropdown List:** Allows selecting of a value from a dropdown list
10. **Textbox:** Single line free text input.
11. **Date field:** Allows selecting date from a calendar.
12. **Lookup field:** Allows linking to a related record. Similar to related lists but only allows linking to a single record.
13. **Textarea:** Allows multi-line free text input.

Using the Lookup control

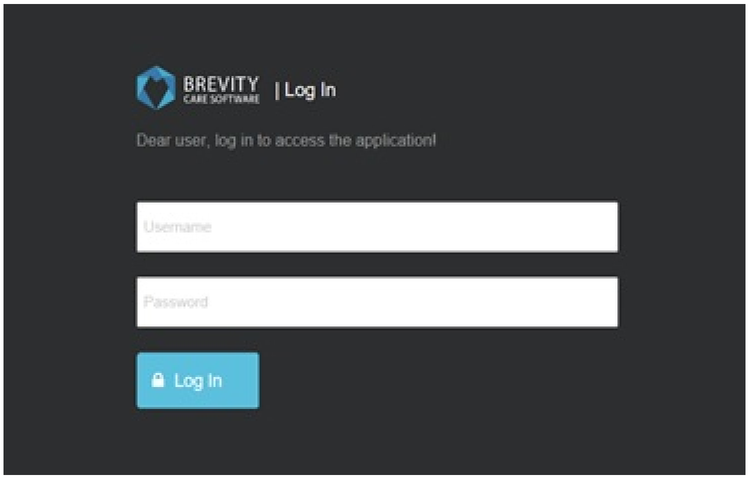
The lookup control is a special control and allows you to link to other records in Brevity. Clicking into the field will show the value dropdown, to allow you to select a value. You can also easily find records by typing within the field to filter the list - this will match any part of the string within available values. You are also able to click either the main search icon to the left of the input box or the search icon within the dropdown to open the advanced search box.



There are a couple of additional icon options in the bottom right of the dropdown list. There a plus icon to add a value to the dropdown list and an open record link that will open the selected record in a new window, to allow you to make changes. There is also a refresh icon to refresh the values after you have added or updated records.

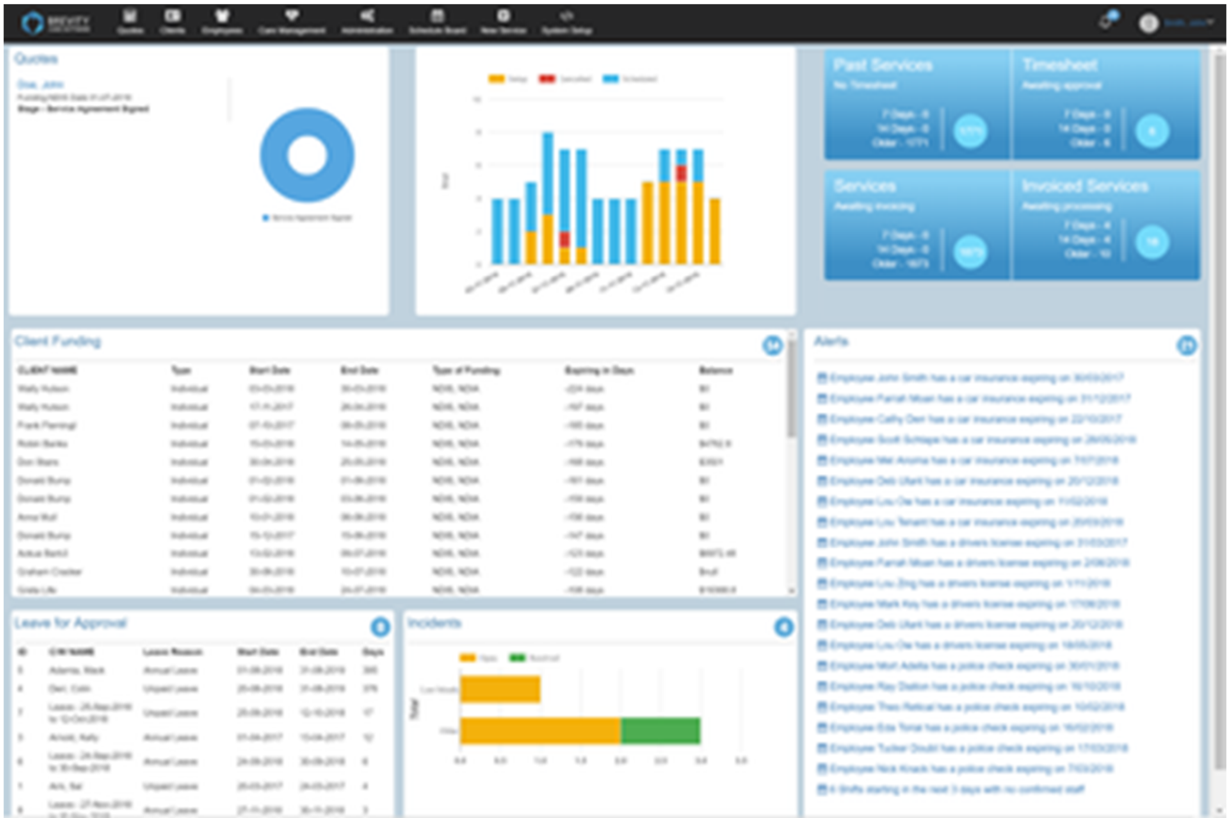
Log-in Screen

Allows you to login to the system using your username and password



System Dashboard

The first screen is shown when you log in to the system, and provides a real-time business event snapshot, to take timely action, or to measure and develop analytics for business reporting. Users can have different dashboards based on their user role. (The Dashboard can be customized and changed. See System Dashboards page for the full instruction how to customize the System Dashboard)



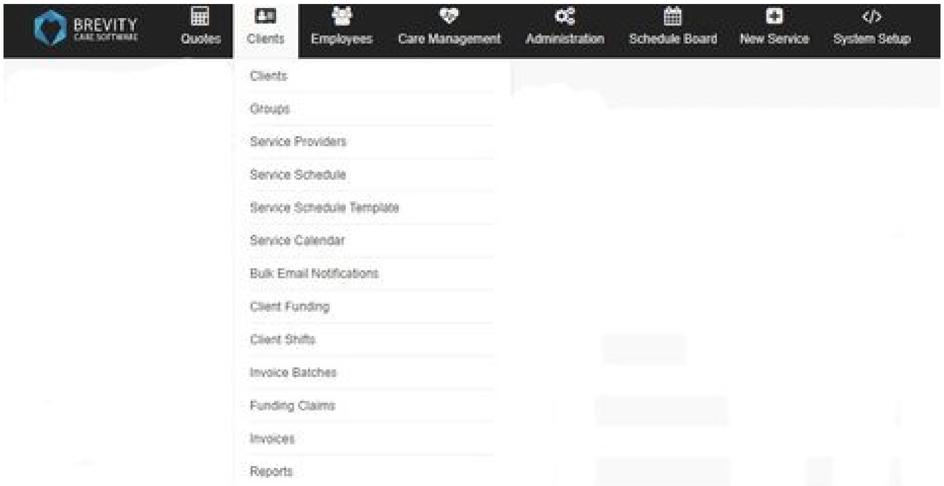
Dashboard Sections

1. **Quotes:** Provides timely reminders of leads that need following up with
2. **Service Schedule Chart:** Provides a snapshot of recent shifts with their status
3. **Payroll/Invoicing Tiles:** Allows you to easily identify shifts with missing timesheets, timesheets that still need to be approved, shifts that haven't been invoiced, and invoiced that haven't been marked as paid or cancelled
4. **Client Funding:** Allows you to see plans that are ending, have a low budget, or are coming up for a plan review
5. **Alerts:** Provide reminders of things that need to be followed up on such as police checks or drivers licenses for employees
6. **Leave:** Displays a list of employee leave requests that are awaiting approval
7. **Incidents:** Displays an overview of all open incidents with their status

---

Client's Menu

The system tab that provides management control and information regarding listed Clients

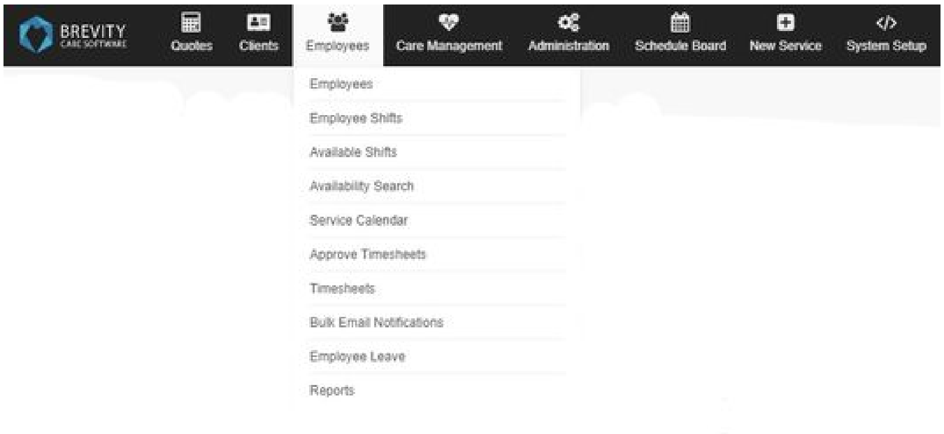


Below are the topics that covers the Client's menu. Click on the topic link to open the page.

Topics for Clients Menu	Link
Clients Menu	Clients Menu
Clients Group	Clients Group
Clients Service Provider	Client's Service Provider
Service Schedule	Service Schedule
Service Schedule Template	Service Schedule Template
Clients Service Calendar	Clients Service Calendar
Clients Bulk Email Notification	Client's Bulk Email Notification
Clients Funding	Clients Funding
Invoice Batches	Invoice Batches
Funding Claim	Funding Claim
Client's Report	Client's Report

Employees Menu

The system tab that provides management control and information regarding listed employees

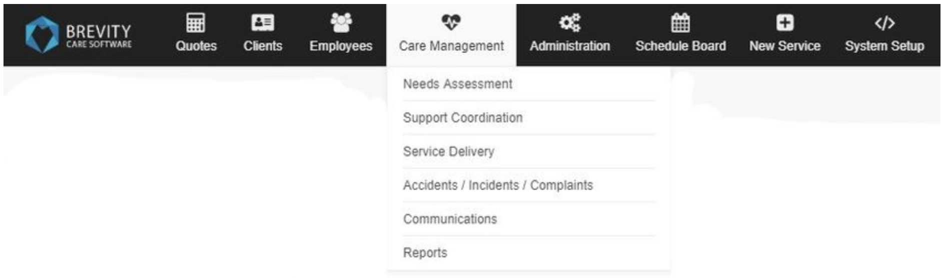


Below are the topics that covers the Employee's menu. Click on the topic link to open the page.

Topics for Employees Menu	Link
Employee's Menu	Employee's Menu
Employees Shift	Employees Shift
Available Shifts	Available Shifts
Availability Search	Availability Search
Employees Service Calendar	Employees Service Calendar
Approved Timesheet	Approved Timesheet
Timesheets	Timesheets
Employee's Bulk Email Notification	Employee's Bulk Email Notifications
Employee's Leave	Employee's Leave
Contractor Invoice	Contractor Invoice
Employee's Report	Employee's Report

Care Management Menu

The system tab that provides management of support coordination services

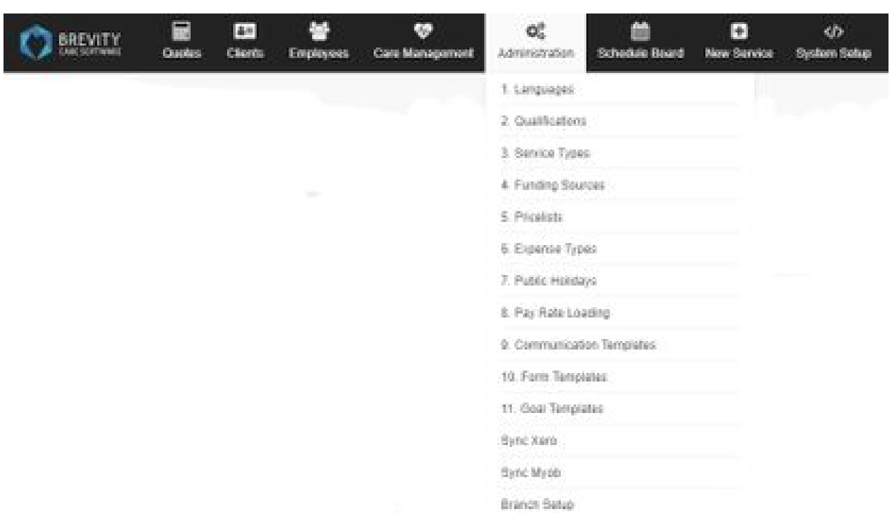


Below are the topics that covers the Care Management menu. Click on the topic link to open the page.

Topics for Care Management Menu	Links
Needs Assessment	Needs Assessment
Support Coordination	Support coordination
Accidents / Incidents / Complaints	Accidents / Incidents / Complaints

Administration Menu

The system tab that manages administrative information for the system

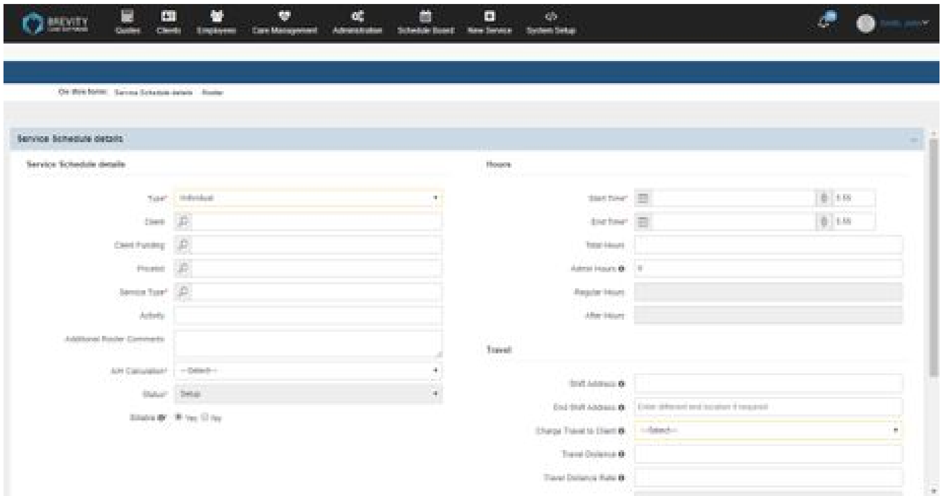


Below are the topics that covers the Employee's menu. Click on the topic link to open the page.

Topics for Administration Menu	Link
Languages	Languages
Employee's Qualification	Employee's Qualification
Service Types	Service types
Funding Source	Funding source
Expense Type	Expense Type
Public Holiday	Public Holiday
Pay Rate Loading	Pay Rate Loading
Syncing MYOB	Syncing MYOB
Syncing XERO	Syncing XERO
Communication Templates	Communication Templates
Branch Setup	Branch Setup

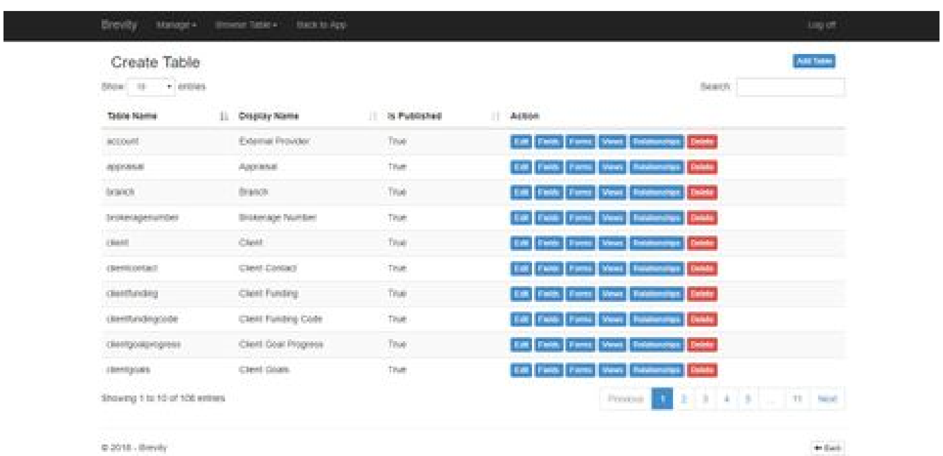
New Service

A system tab that lets the user create a new service entry in the roster



System Setup Menu

This page lets the user customize the information being shown and ask by the system, such as tables and forms



Below are the topics that covers the System Setup menu. Click on the topic link to open the page.

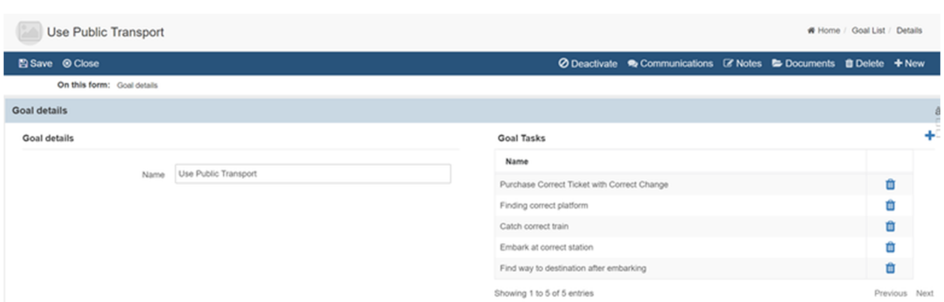
Topics for System Setup Menu	Link
System Dashboards	System Dashboards
System Workflows	System Workflows
System Alerts	System Alerts
System Reports	System Reports
System Charts	System Charts
Form Scripts	Form Scripts
Tables, Fields, Forms and Views	Tables, Fields, Forms and Views
System Widgets	System Widgets
XERO Mappings	XERO Mappings
MYOB Mappings	MYOB Mappings

Brevity Goal Management

As you know NDIS is outcomes based, which makes it important to track progress during each shift. Using our goal management functionality, you are able to seamlessly record goal progress and report on these using an easy to ready consolidated report.

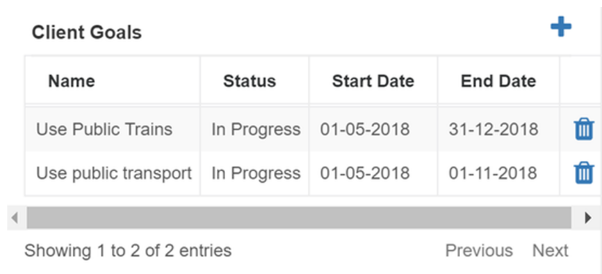
Creating Goal Templates

The first step in setting up goal, is to setup your goal templates. Goal templates allow you to specify all the tasks the client must complete to achieve their goals. This allows you to assign the same task to all clients that have the same goals. You can access the *Goal Template* section from the *Administration* menu:

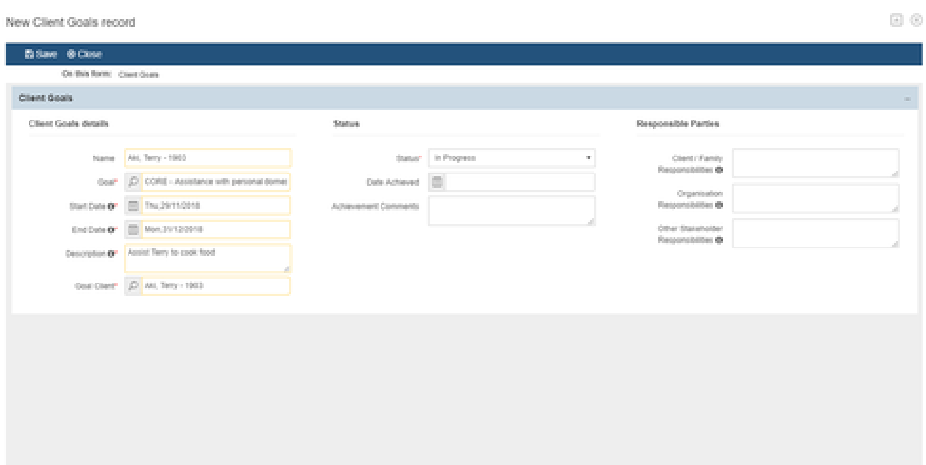


Setting up Client Goals

Once you have setup your goal templates, you are able to then setup the client goals. Client goals are setup from the client screen (Client Goals section):

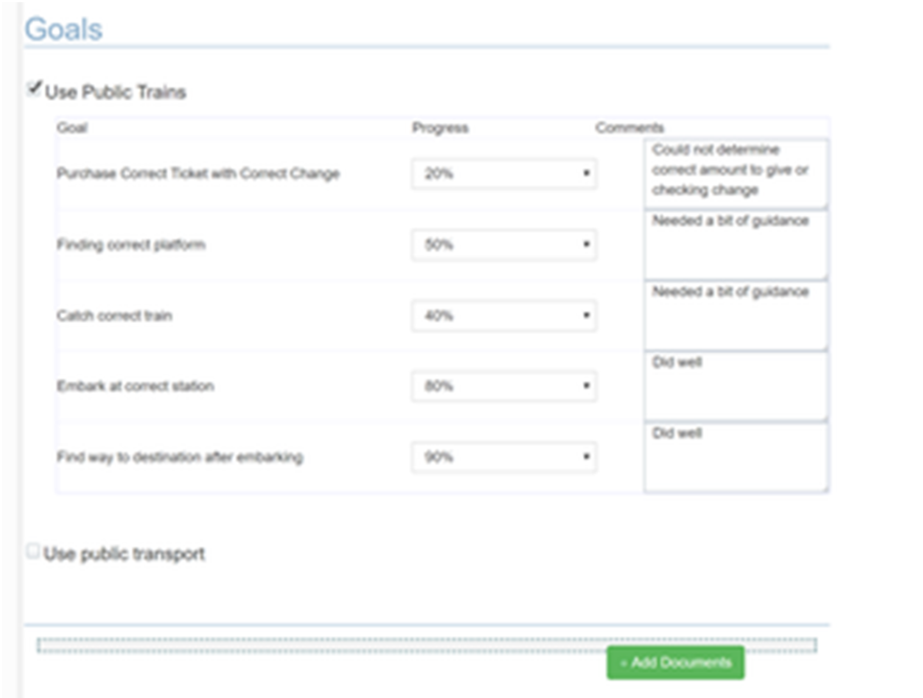


Each client goal is assigned a period for achieving the goal. Progress toward the goal can be assessed every couple of weeks and the Status and Comments completed as required:



Recording Goal Progress

Progress toward a Goal can be easily recorded during each service with the client. The report can be completed by the care worker at the time of completing their timesheets via the staff portal (or at a later date).



Goals

✓ Use Public Trains

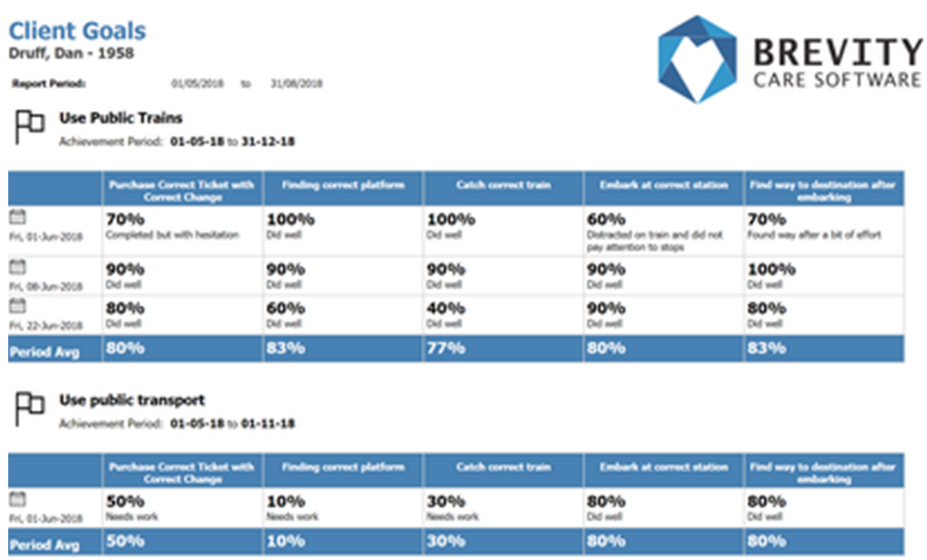
Goal	Progress	Comments
Purchase Correct Ticket with Correct Change	20%	Could not determine correct amount to give or checking change
Finding correct platform	50%	Needed a bit of guidance
Catch correct train	40%	Needed a bit of guidance
Embark at correct station	80%	Did well
Find way to destination after embarking	90%	Did well

Use public transport

+ Add Documents

Reporting on Goal Progress

You can report on goals using the in-built reporting as both evidence to NDIA or to provide to the client:



Client Goals

Druff, Dan - 1958

Report Period: 01/05/2018 to 31/08/2018

Use Public Trains

Achievement Period: **01-05-18** to **31-12-18**

	Purchase Correct Ticket with Correct Change	Finding correct platform	Catch correct train	Embark at correct station	Find way to destination after embarking
Fri, 01-Jun-2018	**70%** Completed but with hesitation	**100%** Did well	**100%** Did well	**60%** Distracted on train and did not pay attention to stops	**70%** Found way after a bit of effort
Fri, 08-Jun-2018	**90%** Did well	**90%** Did well	**90%** Did well	**90%** Did well	**100%** Did well
Fri, 22-Jun-2018	**80%** Did well	**60%** Did well	**40%** Did well	**90%** Did well	**80%** Did well
Period Avg	80%	83%	77%	80%	83%

Use public transport

Achievement Period: **01-05-18** to **01-11-18**

	Purchase Correct Ticket with Correct Change	Finding correct platform	Catch correct train	Embark at correct station	Find way to destination after embarking
Fri, 01-Jun-2018	**50%** Needs work	**10%** Needs work	**30%** Needs work	**80%** Did well	**80%** Did well
Period Avg	50%	10%	30%	80%	80%

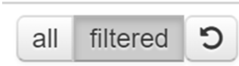
Brevity Schedule Board

The Brevity Schedule Board provides a powerful way to view service for your organisation in a calendar view - by day, by week, by fortnight, or by month. It allows you to also easily manage day-to-day service delivery, and perform bulk scheduling changes via the quick actions. The client quick links also allow you to quickly and easily manage all aspects of service delivery:

There are several view and filter options available to allow to quickly and easily find the information you need within the board. We will explore all of these within this article.

Filtering on the board

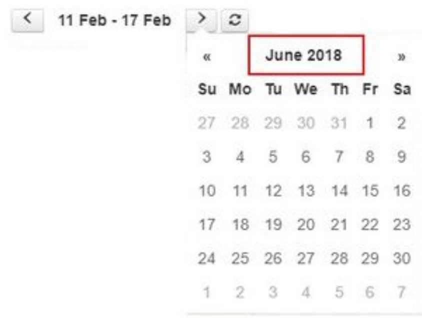
The filter on the far right allow you to toggle the view to show either client/employees that have service, or all client/employees:



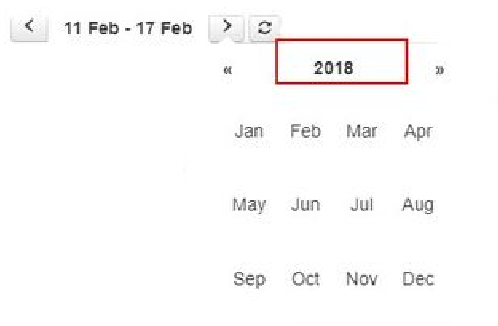
Selecting all will show all the list of the client / employee even if they don't have a service schedule. The filtered button will show the list of the client / employee with the service schedule.

The period filter allows you to view the calendar by day, week, fortnight or month:

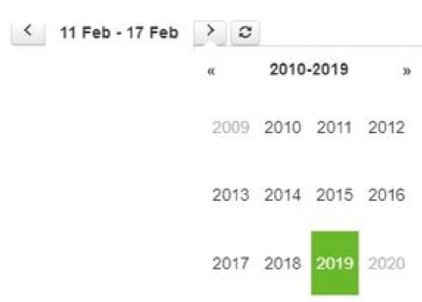
The date range filter allows you easily navigate back and forth between weeks/months. You are able able to click between the arrows to select a date, or to select the day of week to start the calendar on. This will be saved once set. e.g. if you fortnightly roster starts on a Tuesday, you can select the Tuesday you fortnight starts on and this will get set for you are default (until it is changed).



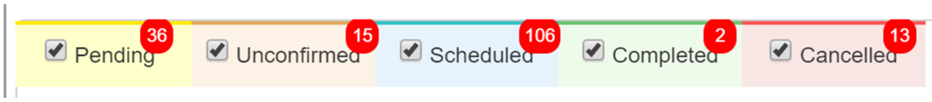
Clicking on the month will show you the list of the month for the year



Clicking on the year will show you the list of the year



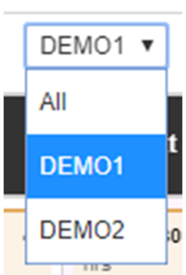
The status filter allows you to view only services that have a particular status on the calendar:



The search box allows you to filter the list on a particular client/employee. To the immediate right of the filter there is a toggle button that allows you to change the view, to view services on the calendar by client or employee:

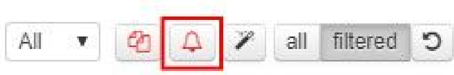
Branch Filter

You are now able to filter shifts by branch, if you have more than one branch or area of your business. This allows you to conveniently view only clients and shifts relating to a branch or area the business...



Notify Employees

You can alert the employees by clicking on the notify employees button. The employees will be alerted from their Brevity Mobile app and they will be reminded of their shift for the next two days.



Managing Clients from the Board

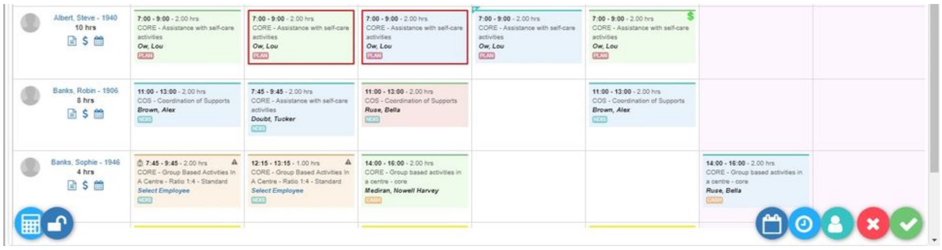
Within the client section on the board there are a few links for easy management of the client and their service setup.

1. Clicking on the client's name will show their client record in a popup window
2. The hours displayed are the number of hours schedule based on the services within calendar view (weekly, fortnightly or monthly)
3. The first icon on the left allows you to quickly access the clients service template record
4. The second icon on the left allows you to quickly access the clients funding record
5. The last icon allows you to view all upcoming service for the client and take bulk action on all upcoming services
6. Clicking on the grey user image will select all service for the client

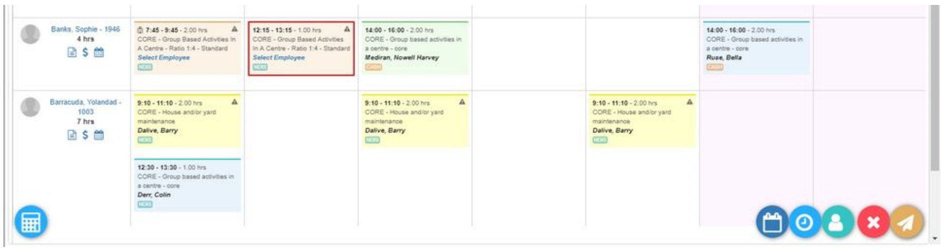
Managing Services from the Board

Selecting services in the list will allow you to perform some quick actions on the selected services (you can select multiple at a time by single-clicking each service).

1. The calculator icon on the bottom left allows you to recalculate both the cost, budget usage and client/staff availability. This can be done if you have made scheduling changes.
2. The unlock icon in the bottom left allows you to unlock completed service (undo the completion). This is available to administrators only.
3. The time icon in the bottom right allows to change the start/end time of the shift e.g. if a client is not available for the week at the usual start time.
4. The user icon allows you to switch out the care worker for another care worker
5. The cancel icon allows you to cancel the selected shifts
6. The green tick icon allows you to complete scheduled shifts



7. The publish shift availability icon allows you to notify the employee that uses the Brevity Mobile App that their is a shift that needs an employee.

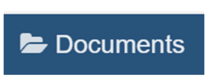


Brevity Document Management

Brevity contains an advanced document management system that allows you to securely store documents against your client and employee records. Using the Brevity document management capability, you can create folders, share documents with Clients and Staff via the portal, as well as view document without needing to download them using the internal viewer. Documents are now also automatically synced to across multiple locations for redundancy.

Navigating to the Document Management Panel

To access the Document section for clients or employees, navigate to their record within the system, and then click the *Documents* button on the toolbar.



This will reveal the documents panel at the top of the same page.

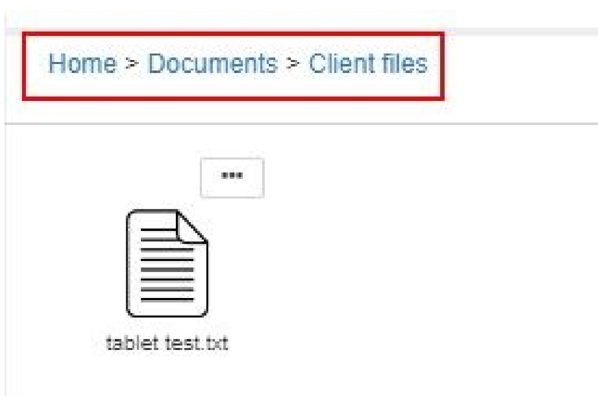
Working with the Document Management Panel

From here you are able to:

1. Create new folders using the link in the right panel
2. Upload files using the link in the right panel, or drag and drop multiple files from your computer to the right panel
3. Change the view between list view and icon view using the horizontal blue icon located on the top right
4. Search for the documents using the search box.
5. Delete a file or Share a file with a client/employee via the portal by clicking the related file more menu and selecting the appropriate option. You can also download the file, or move the file to different folders.
6. Click on the uploaded file to preview the Files

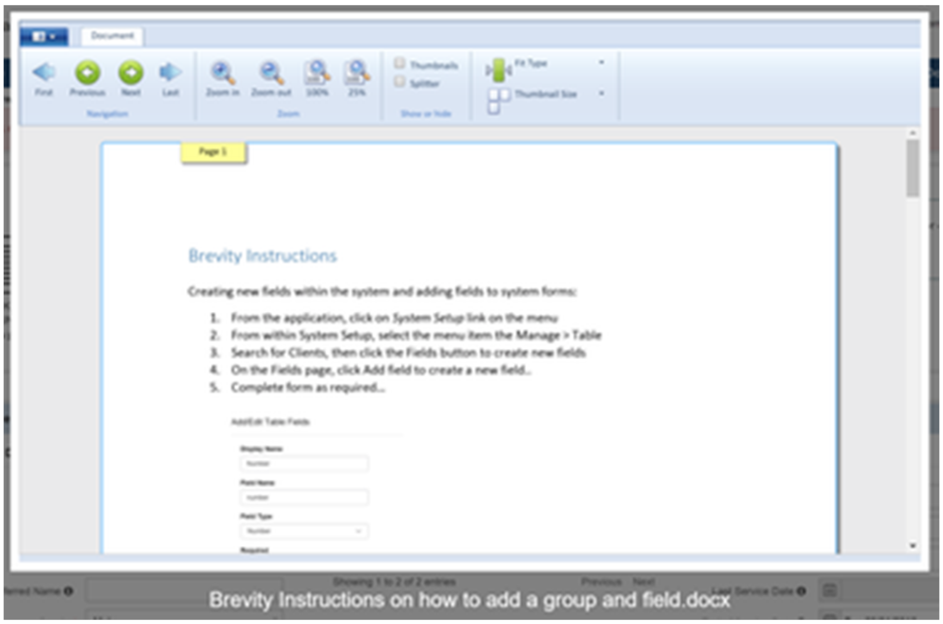
Navigating the Document Folders

You can go to the different folder by using the navigation tab. You can click on the tabs to go to the previous folder. You can open a folder by clicking on the folder that you want to open.



Previewing Documents

The document module in Brevity has an in-built document viewer allowing you to easily view documents, without needing to download them. This saves time by being able to view the document online without waiting for it to download. This is especially handy when browsing from a mobile device as it saves on data usage as well as gets around needing the propitiatory apps for opening the document:



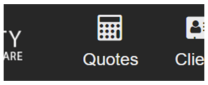
Quoting, Service Agreement, Care Plans & Brevity Mail Merge

The brevity quoting module has been setup to allow you to quickly and easily create quotes, care plans and service agreements for clients. The quoting module allows you to plan and optimize the clients services based on their budget. Quotes can be converted to a client, funding and service template with a click of a button once approved by the client, which is a real time saver. This function can also be used to quickly setup new clients!

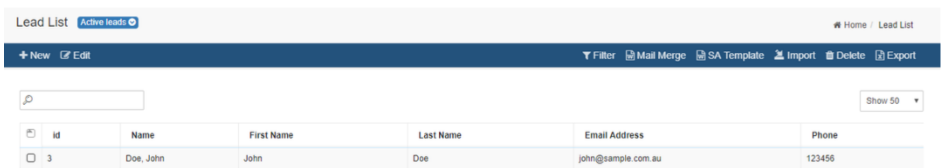
These are the topics on this page:

Working with the Quoting Function

The quoting function can be accessed via the *Quotes* menu item:

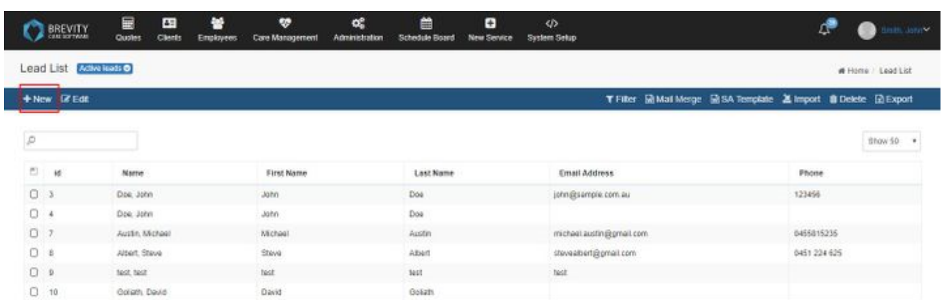


This will take you to the Lead section. Leads are basically potential clients. You are able to manage these records the same way you do any other record in Brevity:

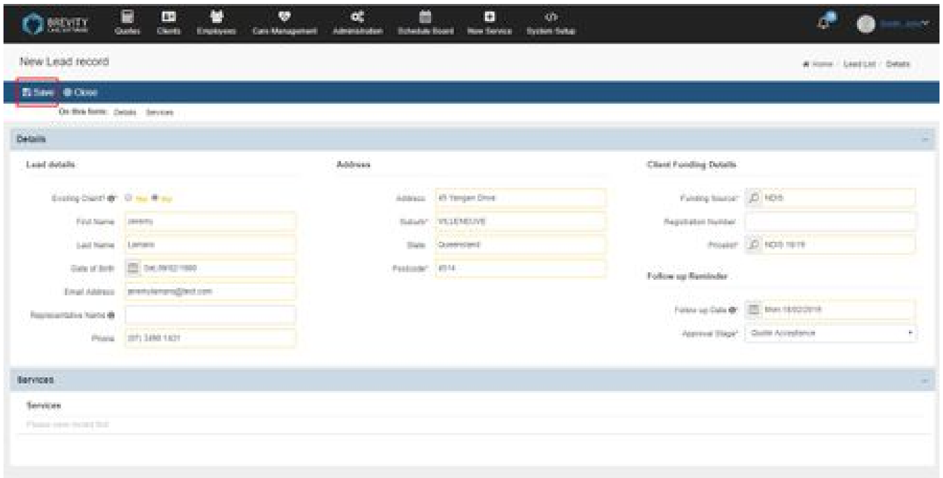


Creating a Lead

Click the + *New* button on the list screen toolbar to create a new record.



You are able to link the quote to an existing client (for plan renewals) or enter in a new 'lead' record with basic information, as well as all the services to be provided to the client. When creating a new quote, Save the form first to activate the Services section in the bottom half of the screen.



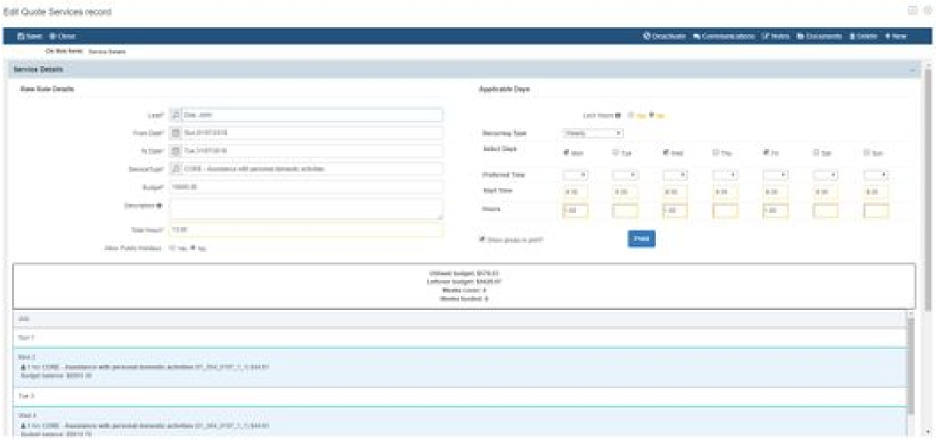
You can add in as many services as needed by clicking the **+** button above the services list.

You can of course also customize the form to suit your organisations needs.

Quoting on Services for a Lead

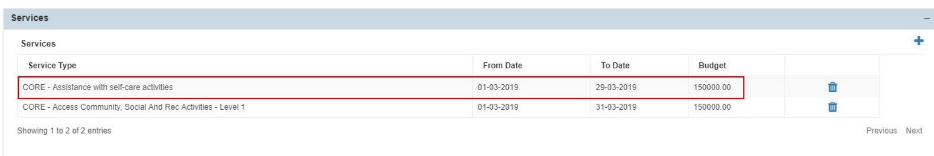
After clicking on the + Button to add the service, you can access the services record page. For each service, you are able to calculate the numbers hours that you will be able to provide the service for each day of the week, indicated in the *Total Hours* field. This is calculated based on the number of weeks the service will be provided over (based on the start and end dates), the available budget, and the number of days required each week.

You can then utilize the planning section on the right to see how many hours you are able to provide on a Weekly/Fortnightly/Monthly basis by selecting the days and times the client wishes to receive these services. You can also enter in your own hours to see the weeks cover that you will be able to provide the service for:

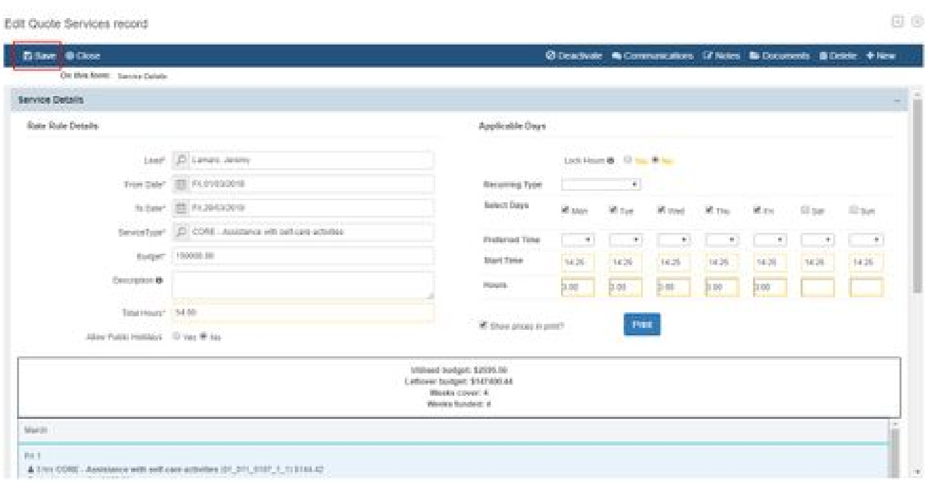


Editing the services

If you need to change the services details, you can edit the services by going to the lead record and then double clicking on the service type from the services field.

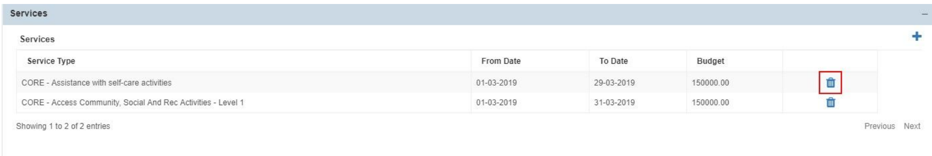


After editing the service details, click on the Save button to save the changes for the service details.

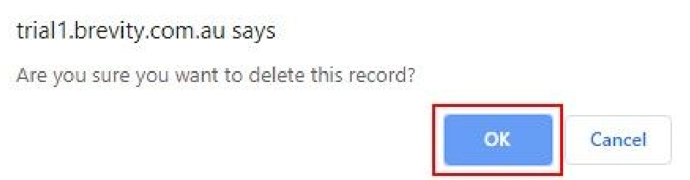


Deleting the Service

If you want to delete the service type from the quote, you need to click on the delete button to remove it.



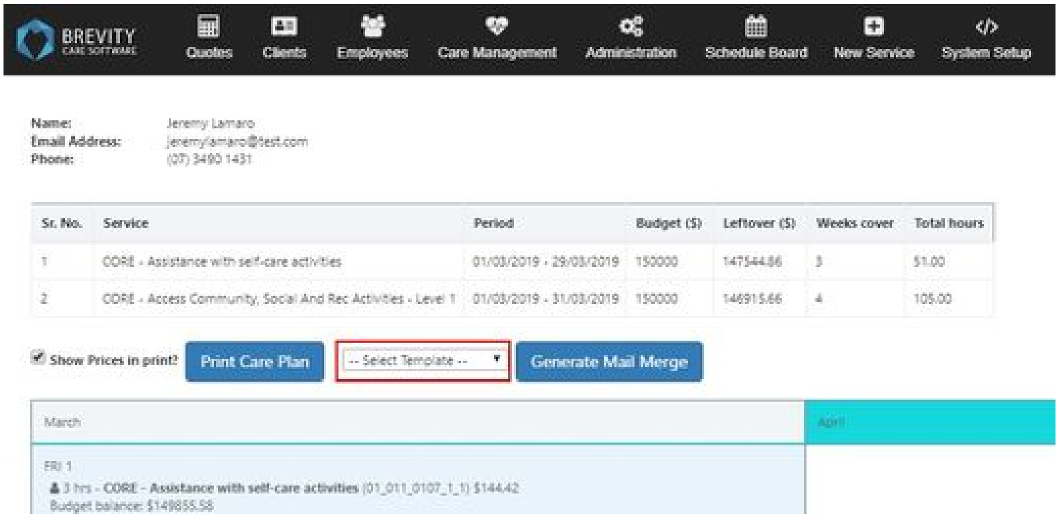
Click on the OK button to confirm the deletion of the service



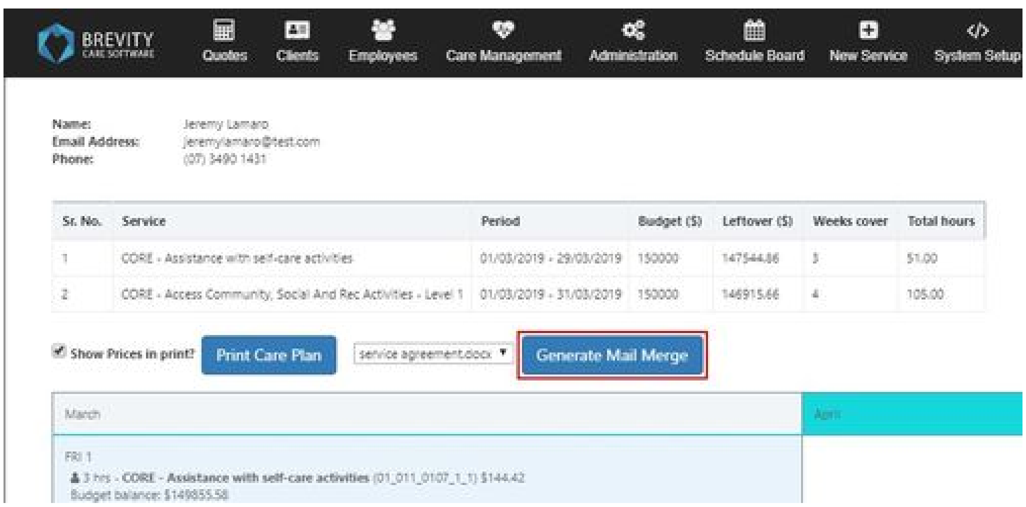
Generating the Service Agreement & Care Plan

You can easily generate a Service Agreement in Microsoft Word format from a quote within Brevity, or print the Care Plan. The Service Agreement function allows you to upload your own Word template files, and use these for generating service agreements. You are able to upload multiple templates, with different wording, for different type of services. To generate a Service Agreement, click the Proposal button on the main Quote screen:

This will show a new window, as shown below. From this new window you are able to print all services from the quote in calendar format (Care Plan) to include with the service agreement if you wish, as well generate the Service Agreement from a selected template. Click on the select template drop down to select the template that you want to use.



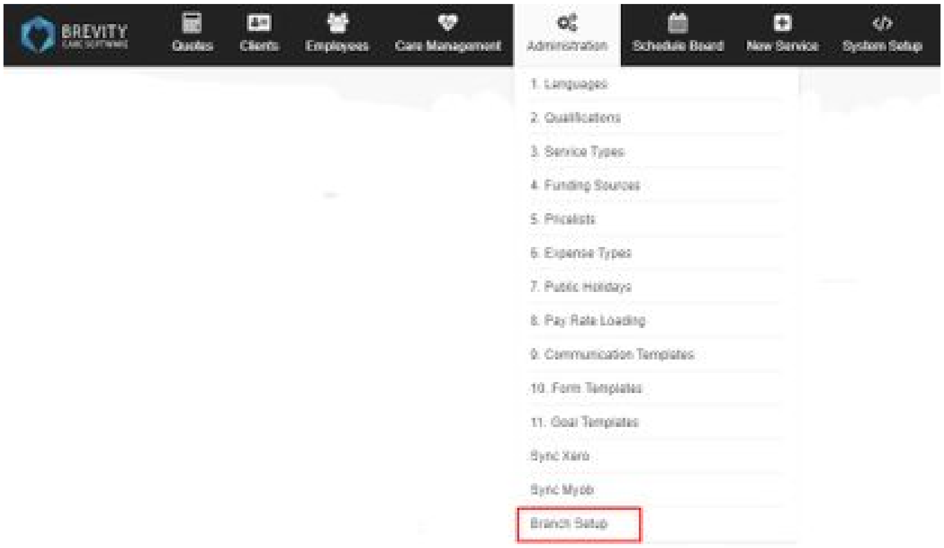
After Selecting the template, click on the Generate Mail Merge button to start Generating the document.



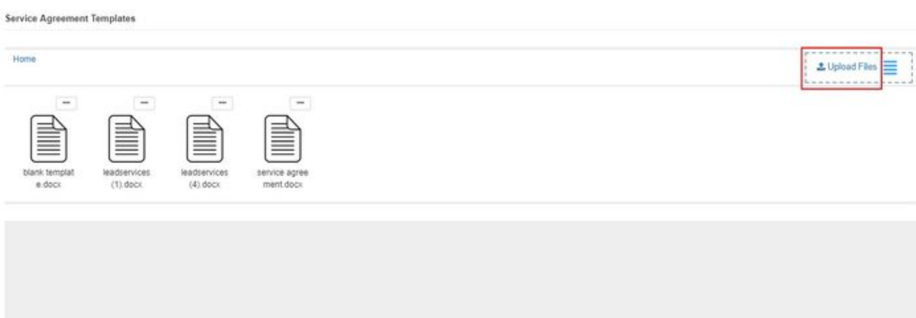
After clicking on the Generate Mail Merge, the file will be automatically downloaded from your computer. The saving or opening process depends on what browser you are using.

Uploading Service Agreement Templates

Service Agreement templates are special types of mail merge templates in Brevity and can be uploaded by going to Administration > Branch Setup.



Under the Service Agreement Templates section, you can upload the service agreement template by clicking on the Upload Files Button. Locate the Service Agreement Template and click on Open button to upload the Template.



You can download the base template from the *Lead List* screen as shown below, that will have placeholders for the services and lead, including any custom fields you have added to the system.

You can then copy and paste content from your service agreement to the base template, before adding in the merge fields. You can download the sample NDIS service agreement via the link below if you don't have a template:

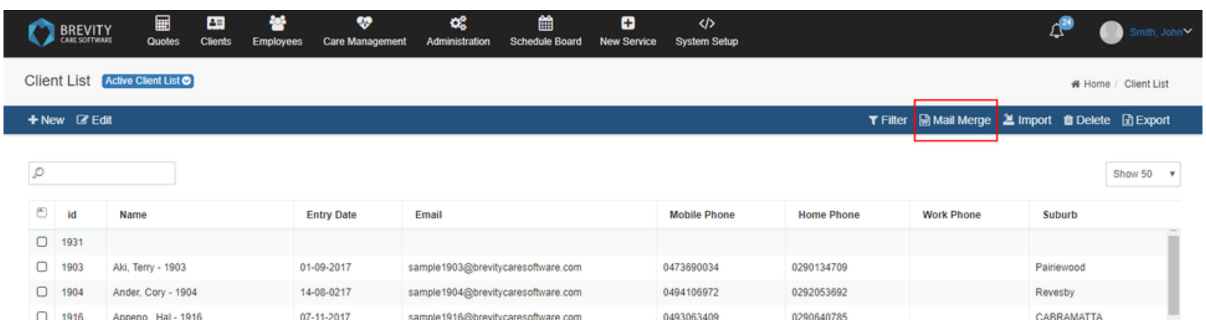
https://providertoolkit.ndis.gov.au/51-service-agreements

Brevity Mail Merge

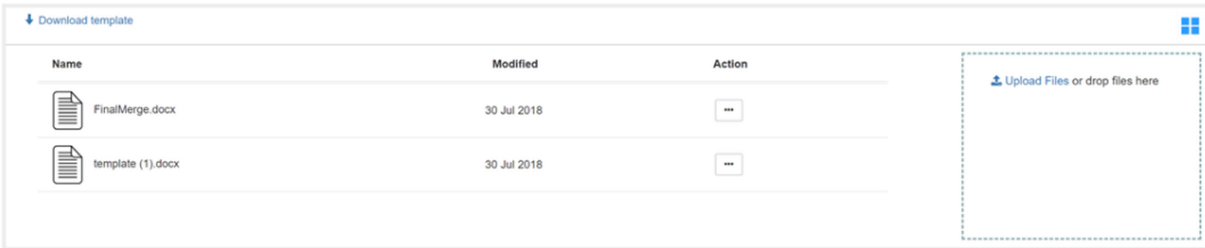
Brevity includes advanced mail merge functionality that allows you to generate Word documents from any type of record within Brevity. This can be individual records or a list of records. This guide explains how to create the mail merge documents and use them for generating documents.

Creating the Mail Merge Template

Mail Merge documents are generated against any records in Brevity. This can be for client, employees, or any other type of record. For generating letters for clients for example we would go to the client list screen (Clients > Client). From here we would click the *Mail Merge* button on the toolbar to show the Mail Merge template section.

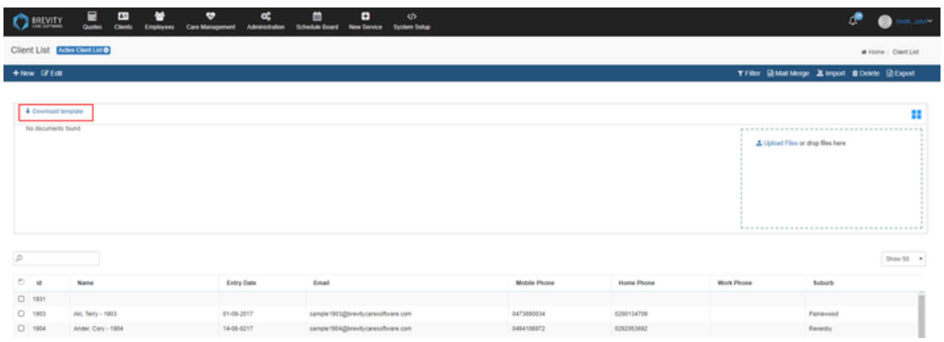


The mail merge template section displays a list of templates previously uploaded. We can also begin creating a new template by clicking the *Download template* link in the top left to download a word file that has all the system field name that we can use in our Mail Merge document.



Download Blank Template

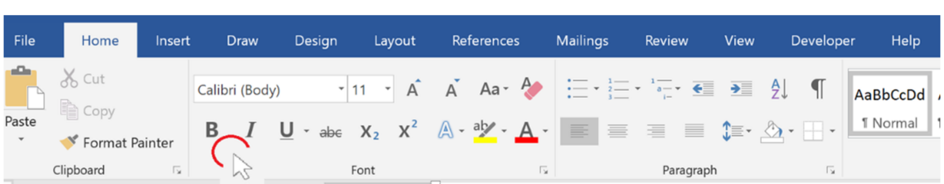
Click the *Download template* link to download the blank template file for the *Clients* table. Open the document in Word.



Accessing the Merge Fields within the Word Template

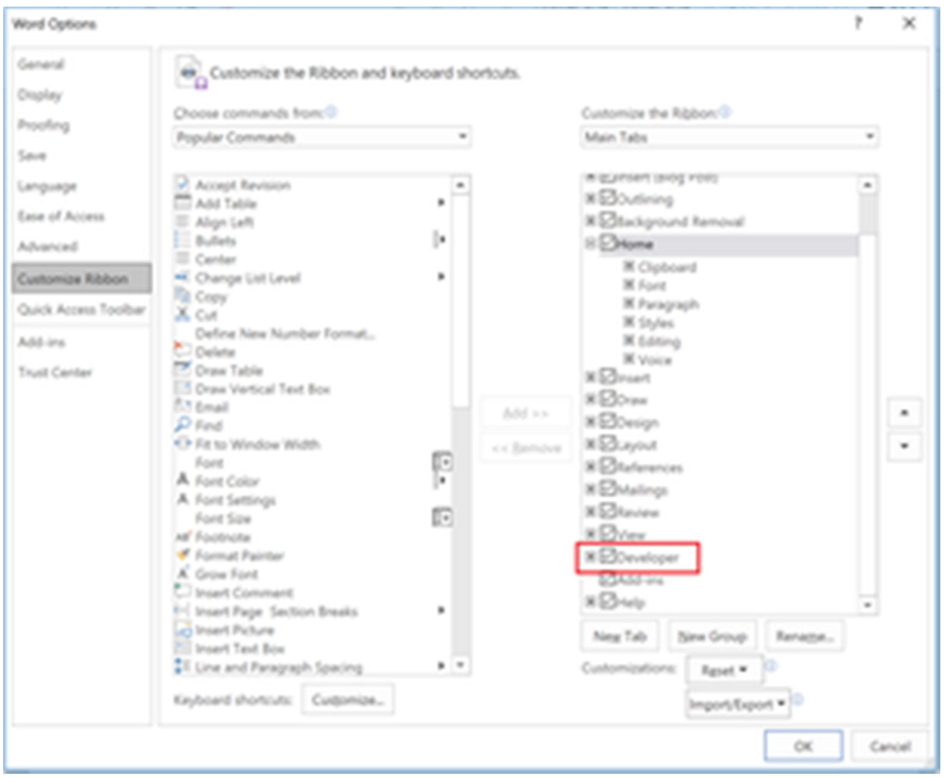
Word for Mac cannot be used as XML editor. You need to have a Windows computer and Microsoft office to create a Mail Merge Document.

To view the merge field pane, you will need to show the *Developer* tab in Word if it is not visible. To do this, right-click anywhere within the ribbon area in Word

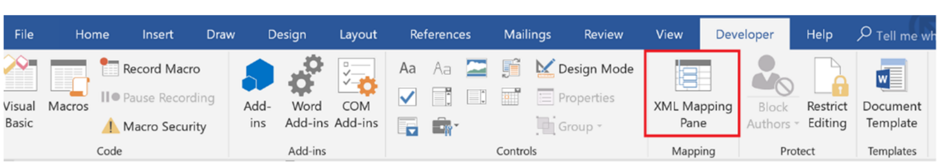


Then select *Customize the Ribbon* option:

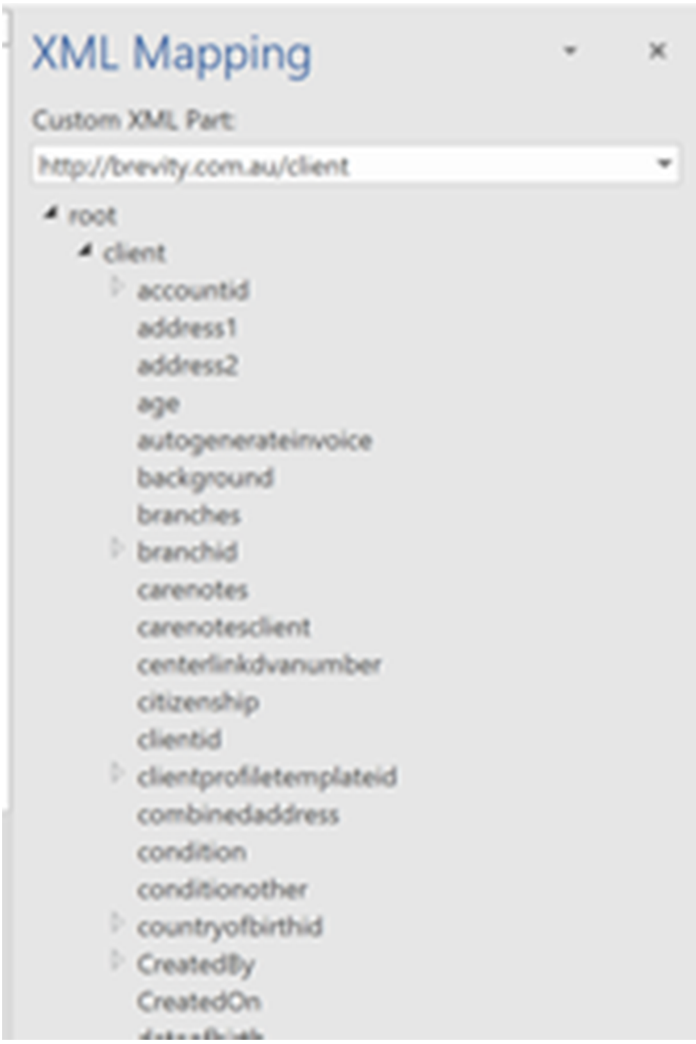
Ensure the *Developer* option is selected and click Ok:



On the Developer tab, click the *XML Mapping Pane* button to show the *XML Mapping Pane*



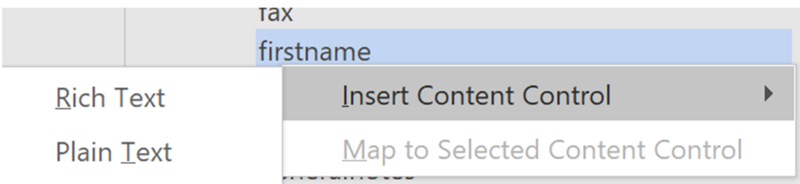
In the XML Mapping Pane, select the brevity option from the dropdown to see the available merge fields



Adding the Merge Fields to the document

If you have a preexisting document you would like to add the merge fields to, you will need to copy and paste the content from your existing document to the blank template, and then add the merge fields from there. To add the merge fields to the document, place the cursor in the position you would like the merge field to be added within the document - this can include embedding within a paragraph.

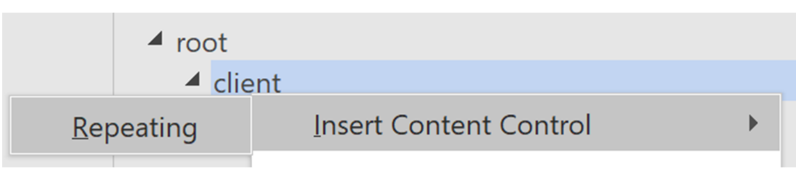
Then right click on the field within the XML Pane that you would like to merge into the document, and select *Insert Content Control* and then *Plain Text..*



You can repeat this process to add all merge field that you require on your document. Save the document once done.

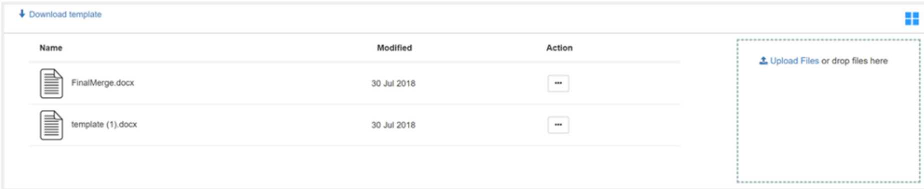
Adding a Repeating Control

If you are planning on using the template for merging more than one record at a time, you will need to add all merge fields (as above) within a repeating control. To add the repeating control, first select all the text within your document by pressing CTRL+A on your keyboard to select all text within your document, then right-click on the first child under the root node in the XML Mapping Pane, then select *Insert Content Control* and then *Repeating..*



Upload Template to Brevity

With the document text and merge fields added, we are ready to upload the template back to Brevity to be used for merging with client records. To do this click the Mail Merge button once again on the Client list screen and then click the Upload Files link in the right pane section to upload the document you created. This should show in the list once uploaded.

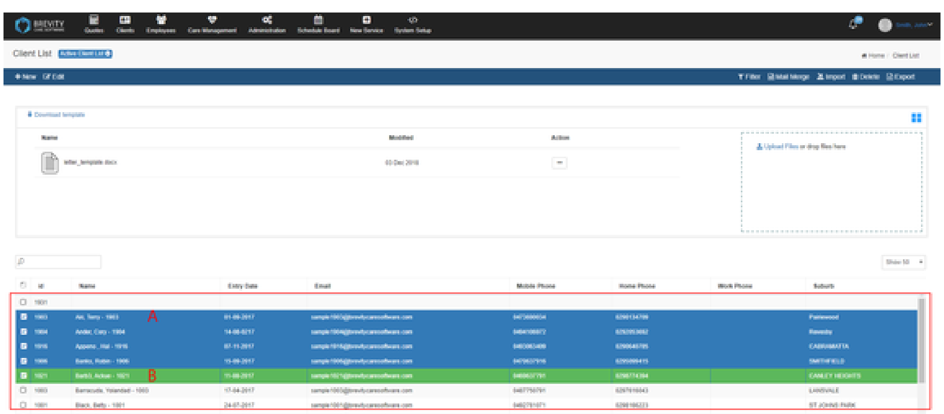


Selecting clients for Mail Merge

After uploading the file, you need to select the client that you want to apply the mail merge template. There are 3 ways to do it:

- **Single Selection.** Just Click on the client's name to select the client. Mail Merge will be applied only to this client.

- **Multiple Selection using Shift Key.** You can click on the first client (A) that you want to apply the mail merge then press and hold the shift key on your keyboard. Select the last client (B) that you want to apply the mail merge and all the clients in between client A and client B will be selected.



- **Multiple Selection using Ctrl Key.** Press and hold the ctrl key on your keyboard and click on the name of the clients you want to apply the mail merge. It will highlight all the clients that mail merge will be applied.

	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
☐	1931							
☑	1903	Aki, Terry - 1903	01-09-2017	sample1903@brevitycaresoftware.com	0473690034	0290134709		Pairiewood
☐	1904	Ander, Cory - 1904	14-08-0217	sample1904@brevitycaresoftware.com	0494106972	0292053692		Revesby
☑	1916	Appeno , Hal - 1916	07-11-2017	sample1916@brevitycaresoftware.com	0493063409	0290640785		CABRAMATTA
☐	1906	Banks, Robin - 1906	15-09-2017	sample1906@brevitycaresoftware.com	0470637916	0295099415		SMITHFIELD
☐	1021	Barb3, Ackue - 1021	11-08-2017	sample1021@brevitycaresoftware.com	0469637791	0298774394		CANLEY HEIGHTS
☑	1003	Barracuda, Yolandad - 1003	17-04-2017	sample1003@brevitycaresoftware.com	0487750791	0297616043		LANSVALE
☐	1001	Black, Betty - 1001	24-07-2017	sample1001@brevitycaresoftware.com	0492781071	0298166223		ST JOHNS PARK
☑	1009	Bump, Donald - 1009	14-05-2017	sample1009@brevitycaresoftware.com	0495923600	0290586861		ASHCROFT
☐	1904	Burghof, Jenny - 1904	23-05-2017	[illegible]	[illegible]	[illegible]		CASULA

Using the Merge Document Template

You are now ready to use the merge template for generating merge documents. To generate the documents for all records shown in the list below, click on the more menu (3 horizontal dots) for the associated template and click the *Mail Merge* option to immediately run and download the mail merge document.

Tips

Note: you can click on this icon  on the upper right corner to change the view of the document.

This is what the merge document looks like once created. We could have added a page break if we wanted each letter to start on a new page:

Pete Sariya
1 Elizabeth Drive Click or tap here to enter text.
Liverpool
NSW 2170

Dear Pete

Monty Carlo
1 Wentmore Street Click or tap here to enter text.
Fairfield
NSW 2165

Dear Monty

Sal Monella
2 Wart Street Click or tap here to enter text.
Allawah
NSW 2218

Dear Sal

Sue Vaneer
1 Honeysuckle Street Click or tap here to enter text.
Moorebank
NSW 2170

Dear Sue

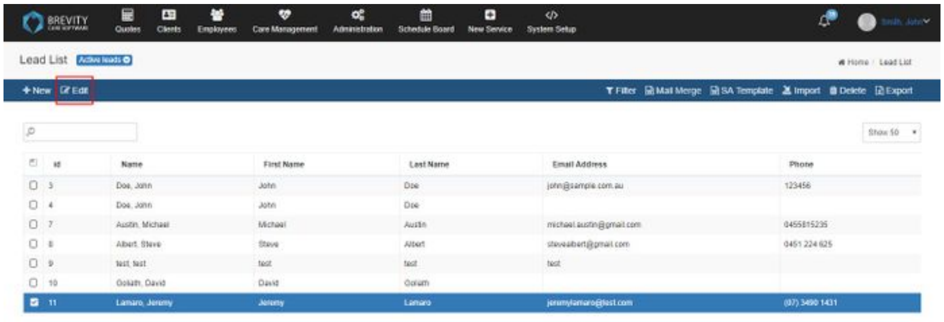
Reminder

You need to download the template for each section (Quotes, Clients, Employees, Care Management). If you download the Client template and use the Mail Merge in the Employees section, the values will not show correctly.

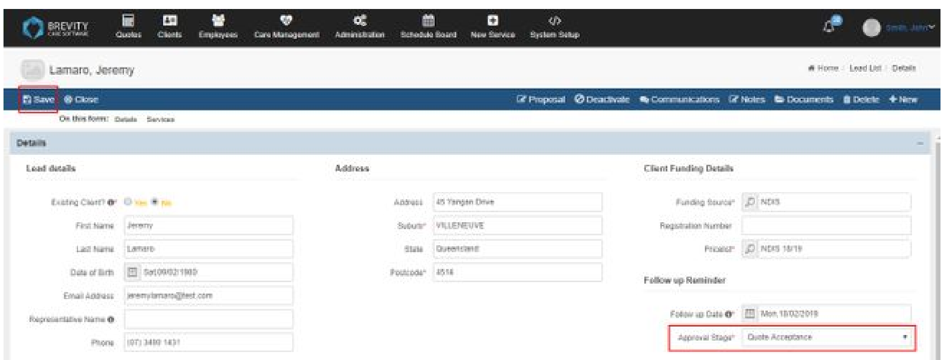
Converting the Client's Lead to Client's Record

If the client signed the service agreement, you can convert the client's lead to a client's record. You can include all the documents and communications files in converting the client's lead.

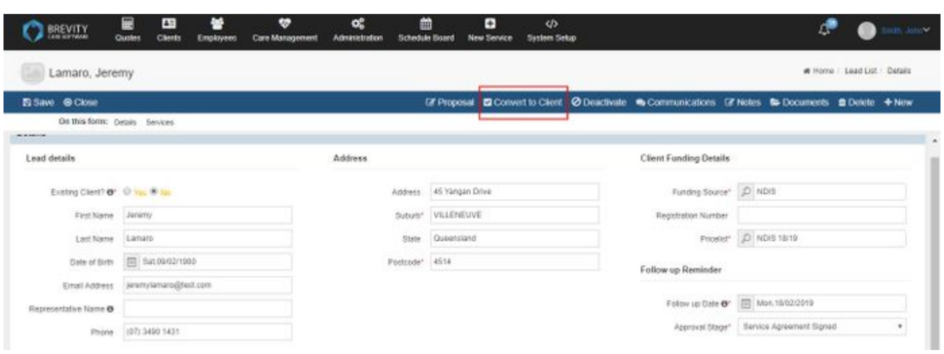
Edit the client's lead so you can set the approval stage of the lead.You can click on the client's lead record and click the edit button to edit the lead or you can double click on the client's lead record to edit it.



After opening the client's lead record, you need to set the status of approval stage. Set the approval stage to Service Agreement Signed and click on the Save Button to save the status of the client's lead.



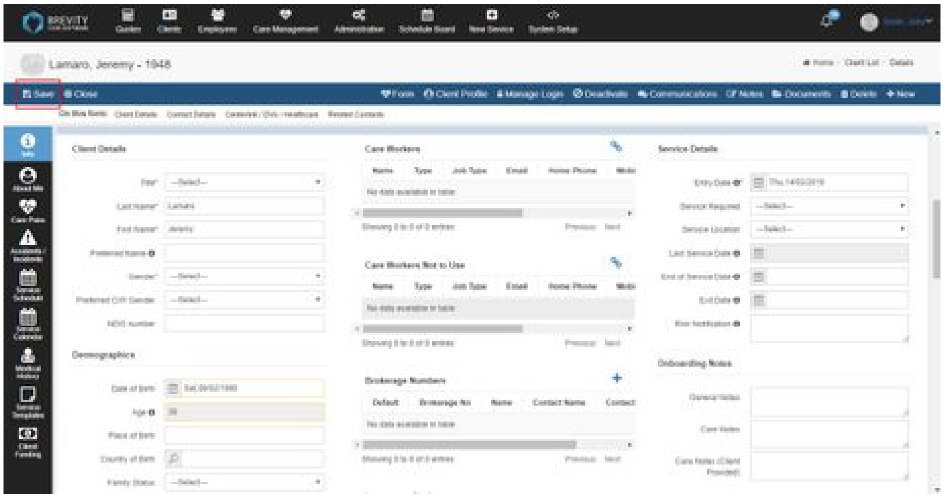
After setting the approval stage to service agreement signed, the convert to client option will appear. Click on the Convert to Client tab to start converting the Client's Lead to Client's record.



The convert lead window will appear. You may include the communications, notes, and Documents that has been attached from the Client's lead. Click on Convert button to convert the lead to client's record.

A confirmation pop up will appear. Click on the OK Button to confirm the converting of the lead to client's record.

After converting the lead, you will be redirected to the client's record. Fill up all the additional information for the client then click on Save button to save the Client's Profile record.



Manage Service Type Pricing using Pricelists

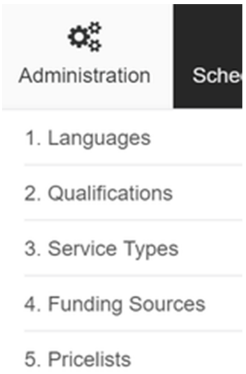
The ability to to charge clients based on agreed rates, or the rates from a clients NDIS service agreement, is an important requirement. While you are able to charge new clients rates available from the latest pricelist, you will need to renegotiate the service agreement with existing clients before you are able to charge based on updated rates. This means that you will need to be able to charge different rates for services delivered to existing and new clients.

Brevity solves this by means of pricelists. Pricelists in Brevity allows you to setup multiple rates for a service type, and specify which pricelist to use for each service you deliver. In this guide we will look at how to manage pricelists in Brevity. Brevity will load updated NDIS pricelists as they become available for you. You are able to adjust, or create your own pricelists, as required.

Note: Only service types linked to a pricelist will show when that pricelists is selected while rostering

Managing Pricelists

You can view and update all pricelists in your system by navigating to *Administration* > *Pricelists*.



Creating a New Pricelist

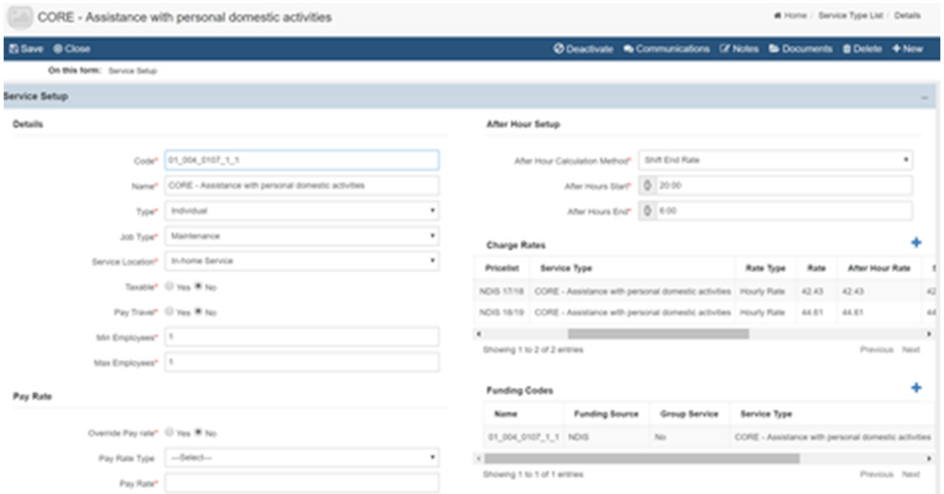
To create a new pricelist, do the following:

1. Click the + New button from the pricelist list screen
2. Provide a name, set the type to Charge Rates, set the effective dates, and click *Save* to create the new pricelists.
3. Add the applicable service types by clicking the **+** icon in the *Pricelist Rates* section, selecting the service types to add
4. Check the tickbox next to the service type and enter the applicable rates for each service you wish to update. Click *Save* again to apply the changes.

Updating a Pricelist

There are two ways to update a pricelists. The first is via Administration > Pricelists (same as when adding above).

The second method is via the Service Type management screen (when editing Service Types). The pricing fields are replaced with a grid that shows all pricelists the service type is associated with, along with the applicable rates. You can edit the rates by double-clicking on the relevant row you wish to update.

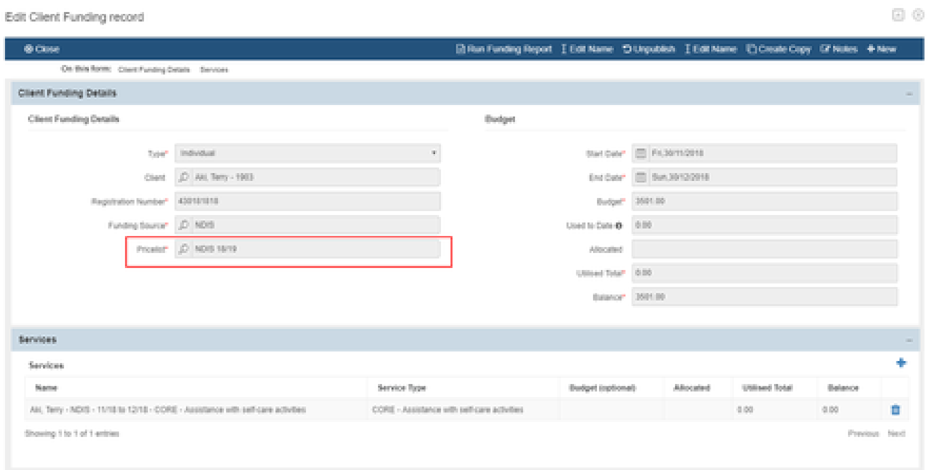


Utilising Pricelists

To ensure the correct charge rates are calculated for each service, Brevity will link the pricelist to the service schedule record (this can be added to the Service Template, and transferred to the service schedule when the roster is generated). You are also able to select the applicable pricing when setting up the client funding, which will carry over to the Service Template and Service Schedule.

Linking the Pricelist to the Client Funding

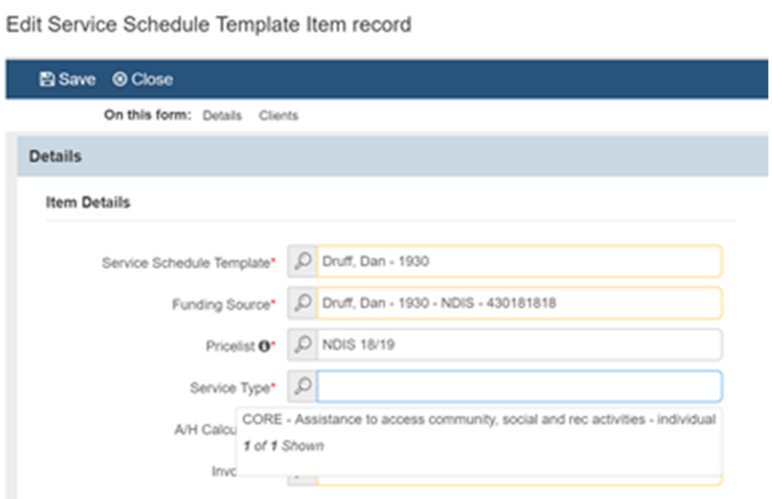
This is an important step and lets the system know which pricelist you have used when creating the Service Agreement. NDIS requires you to claim at the same rate that you have included within the Service Agreement. The Pricelist selected here will be automatically selected when creating the *Service Template* and *Service Schedule* that are linked to this funding.



Linking the Pricelist to the Service Template

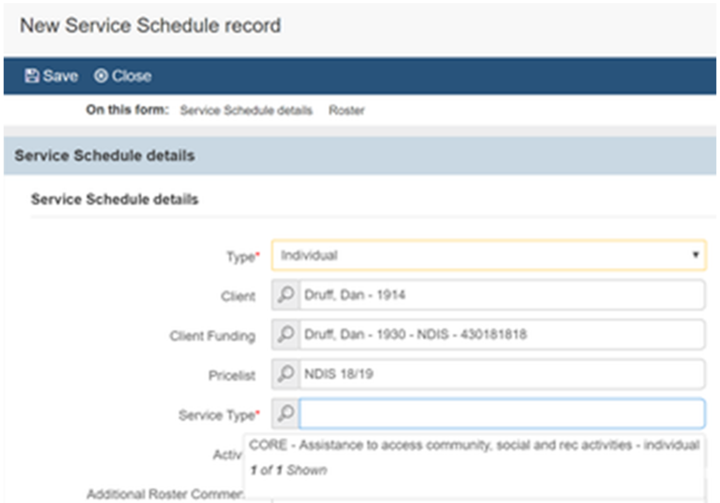
The pricelist is now a mandatory field when adding items to the Service Template. Service Types will be filtered based on the Funding Source and Pricelist selected. The pricelist will be automatically selected based on the Funding Source selected (if setup).

When generating the Roster from the Service Template, all Service Schedule records created will be linked to the pricelist selected here.



Linking the Pricelist to Service Schedule records

The pricelist is a mandatory field when creating once-off services. Again, the pricelist will be automatically selected based on the *Funding Source* selected, and the *Service Type* list will be filtered based on the *Funding Source* and *Pricelist* selected.

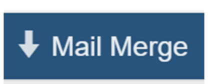


Brevity Mail Merge

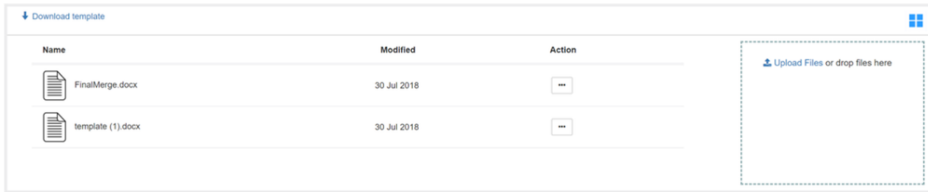
Brevity includes advanced mail merge functionality that allows you to generate Word documents from any type of record within Brevity. This can be individual records or a list of records. This guide explains how to create the mail merge documents and use them for generating documents.

Creating the Mail Merge Template

Mail Merge documents are generated against any records in Brevity. This can be for client, employees, or any other type of record. For generating letters for clients for example we would go to the client list screen (Clients > Client). From here we would click the *Mail Merge* button on the toolbar to show the Mail Merge template section.

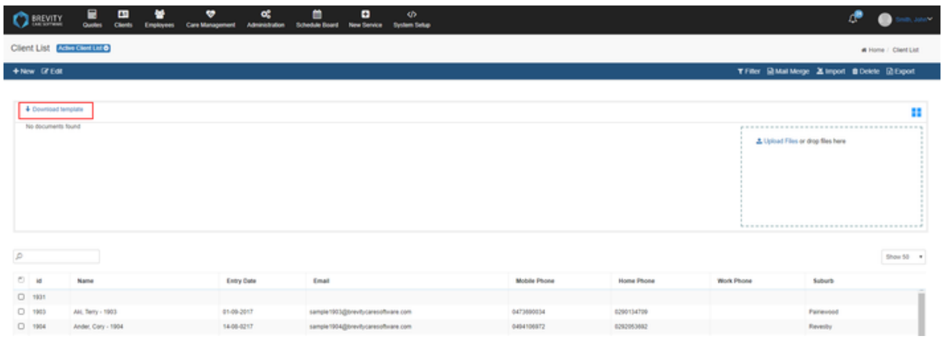


The mail merge template section displays a list of templates previously uploaded. We can also begin creating a new template by clicking the *Download template* link in the top left to download a word file that has all the system field name that we can use in our Mail Merge document.



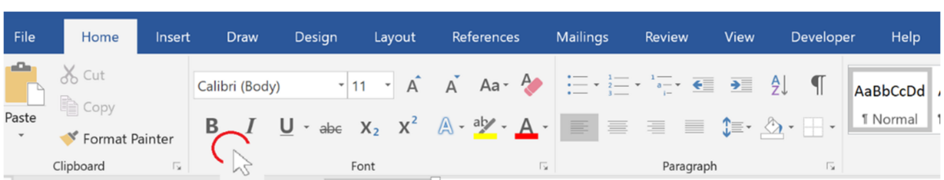
Download Blank Template

Click the *Download template* link to download the blank template file for the *Clients* table. Open the document in Word.



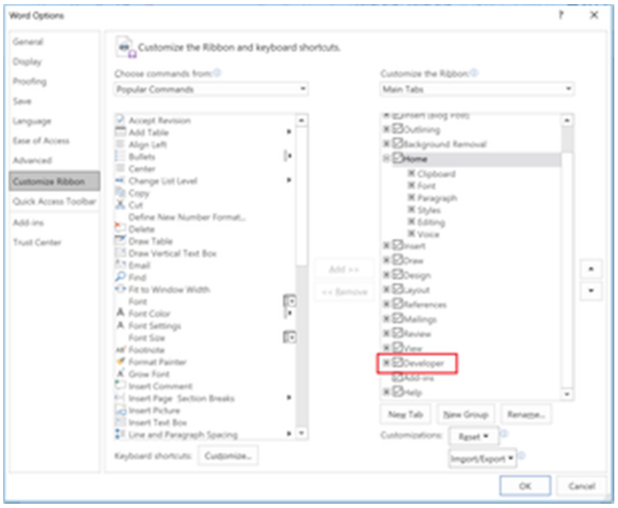
Accessing the Merge Fields within the Word Template

To view the merge field pane, you will need to show the *Developer* tab in Word if it is not visible. To do this, right-click anywhere within the ribbon area in Word

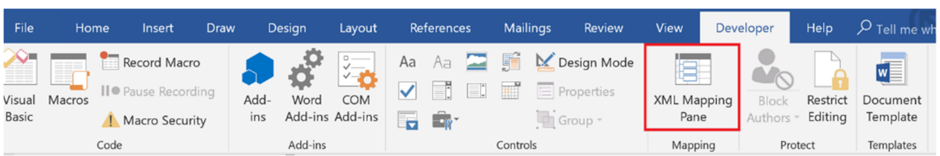


Then select *Customize the Ribbon* option:

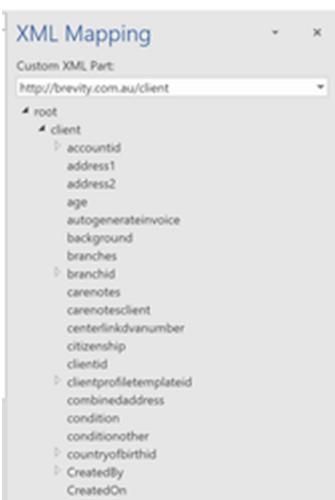
Ensure the *Developer* option is selected and click Ok:



On the Developer tab, click the *XML Mapping Pane* button to show the *XML Mapping Pane*



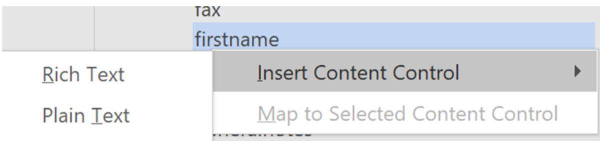
In the XML Mapping Pane, select the brevity option from the dropdown to see the available merge fields



Adding the Merge Fields to the document

If you have a preexisting document you would like to add the merge fields to, you will need to copy and paste the content from your existing document to the blank template, and then add the merge fields from there. To add the merge fields to the document, place the cursor in the position you would like the merge field to be added within the document - this can include embedding within a paragraph.

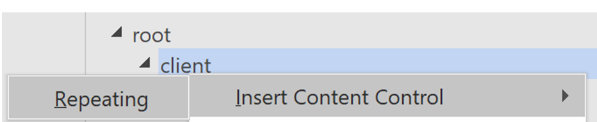
Then right click on the field within the XML Pane that you would like to merge into the document, and select *Insert Content Control* and then *Plain Text..*



You can repeat this process to add all merge field that you require on your document. Save the document once done.

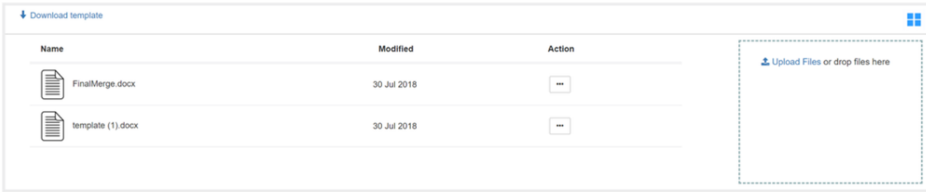
Adding a Repeating Control

If you are planning on using the template for merging more than one record at a time, you will need to add all merge fields (as above) within a repeating control. To add the repeating control, first select all the text within your document by pressing CTRL+A on your keyboard to select all text within your document, then right-click on the first child under the root node in the XML Mapping Pane, then select *Insert Content Control* and then *Repeating..*



Upload Template to Brevity

With the document text and merge fields added, we are ready to upload the template back to Brevity to be used for merging with client records. To do this click the Mail Merge button once again on the Client list screen and then click the Upload Filed link in the right pane section to upload the document you created. This should show in the list once uploaded.

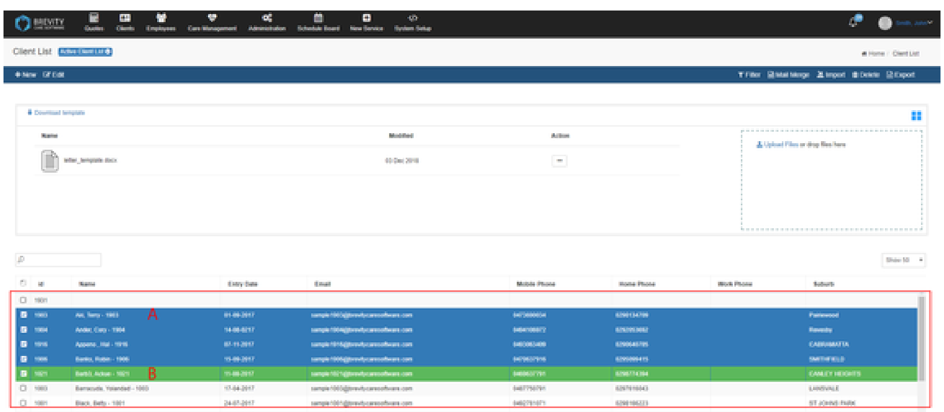


Selecting clients for Mail Merge

After uploading the file, you need to select the client that you want to apply the mail merge template. There are 3 ways to do it:

- **Single Selection.** Just Click on the client's name to select the client. Mail Merge will be applied only to this client.

- **Multiple Selection using Shift Key.** You can click on the first client (A) that you want to apply the mail merge then press and hold the shift key on your keyboard. Select the last client (B) that you want to apply the mail merge and all the clients in between client A and client B will be selected.



- **Multiple Selection using Ctrl Key.** Press and hold the ctrl key on your keyboard and click on the name of the clients you want to apply the mail merge. It will highlight all the clients that mail merge will be applied.

	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
☐	1931							
☑	1903	Aki, Terry - 1903	01-09-2017	sample1903@brevitycaresoftware.com	0473690034	0290134709		Pairiewood
☐	1904	Ander, Cory - 1904	14-08-0217	sample1904@brevitycaresoftware.com	0494106972	0292053692		Revesby
☑	1916	Appeno , Hal - 1916	07-11-2017	sample1916@brevitycaresoftware.com	0493063409	0290640785		CABRAMATTA
☐	1906	Banks, Robin - 1906	15-09-2017	sample1906@brevitycaresoftware.com	0470637916	0295099415		SMITHFIELD
☐	1021	Barb3, Ackue - 1021	11-08-2017	sample1021@brevitycaresoftware.com	0469637791	0298774394		CANLEY HEIGHTS
☑	1003	Barracuda, Yolandad - 1003	17-04-2017	sample1003@brevitycaresoftware.com	0487750791	0297616043		LANSVALE
☐	1001	Black, Betty - 1001	24-07-2017	sample1001@brevitycaresoftware.com	0492781071	0298166223		ST JOHNS PARK
☑	1009	Bump, Donald - 1009	14-05-2017	sample1009@brevitycaresoftware.com	0495923600	0290586861		ASHCROFT
☐	1004	Burghof, Jenny - 1004	23-05-2017	sample1004@brevitycaresoftware.com	[illegible]	[illegible]		CASULA

Using the Merge Document Template

You are now ready to use the merge template for generating merge documents. To generate the documents for all records shown in the list below, click on the more menu (3 horizontal dots) for the associated template and click the *Mail Merge* option to immediately run and download the mail merge document.

Tips

Note: you can click on this icon  on the upper right corner to change the view of the document.

This is what the merge document looks like once created. We could have added a page break if we wanted each letter to start on a new page:

Reminder

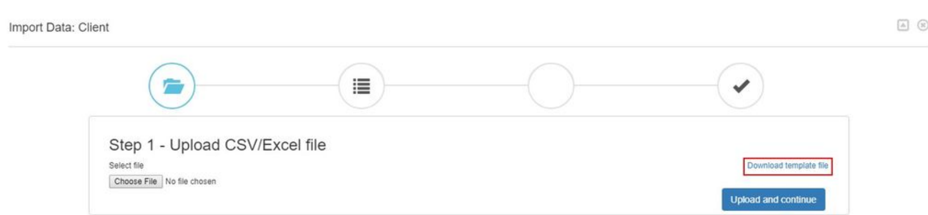
You need to download the template for each section (Quotes, Clients, Employees, Care Management). If you download the Client template and use the Mail Merge in the Employees section, the values will not show correctly.

Brevity Import and Export function Importing the Data

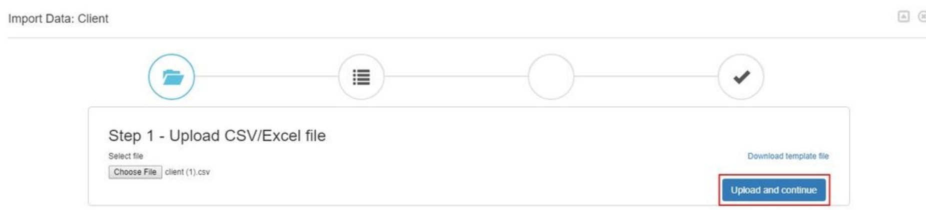
To quickly setup your existing Clients and Employees on the system, Brevity has an import function tab. This allows you to easily upload records for clients and employees. With just a couple of minutes, all records would then be found under the Clients/Employees tab. This allows us to save time and allows us to start right away. This guide explains how to import files thru the system.

This can be used for both clients and employees bulk upload. From the clients tab, we would click the *Import* button on the toolbar to show the Import data section. We can then upload the Excel file and make sure that the required fields are mapped.

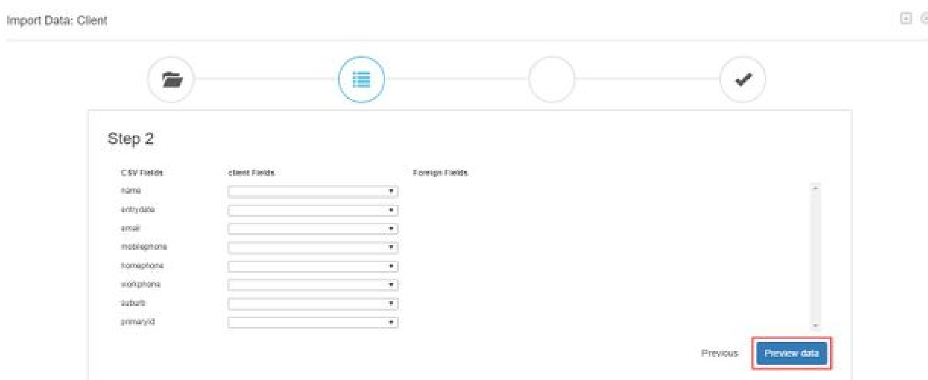
You can also click on the *Download template file* to use as a guide on which information are needed on the system. You can open these template by using 3rd party applications like Microsoft Excel or other spreadsheet programs.



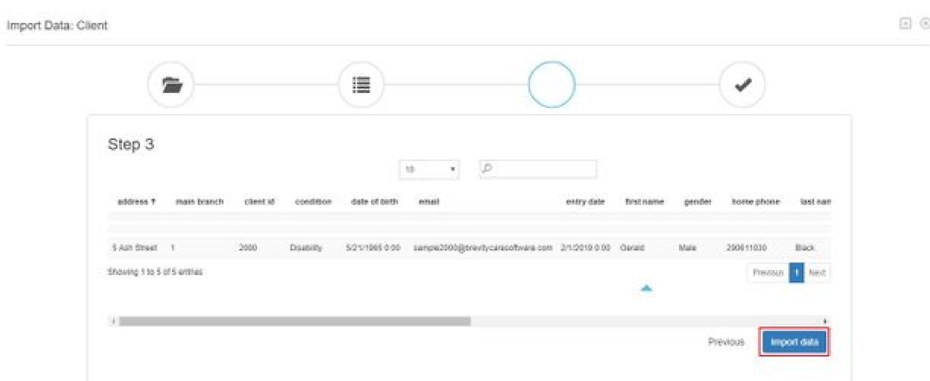
After choosing the file that will be exported to Brevity, Click on the Upload and continue button.



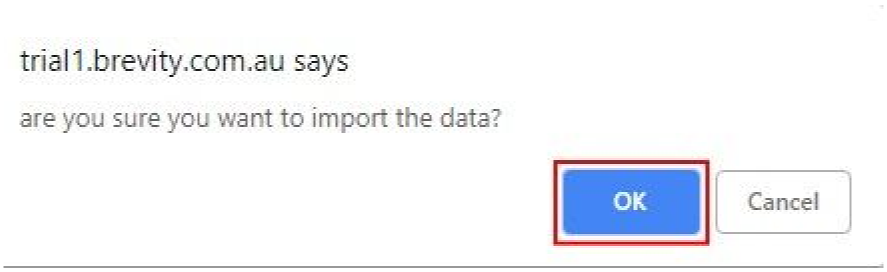
Brevity will check for the CSV fields from the file you uploaded. You can link the CSV fields to the Brevity fields by choosing the client fields from the drop down menu. After linking the fields, click on the preview data button to go to the next step.



It will show you the Preview of the client's list that will be imported to Brevity. Click on the Import Data button to import the clients list into Brevity.



Click on the OK Button to confirm the importing of the data to Brevity

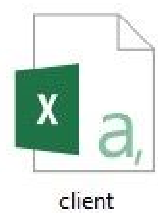


It will show a confirmation window that the records has been imported and it will redirect you to Step 1 wherein you can upload another file to be

Exporting the Data

You can export the list from the table by clicking on the Export Tab. All the information from the table will be generated in the exported file.

After clicking the export button, Brevity will automatically download the file to your computer. You can open the file using 3rd party software like Microsoft excel or other spreadsheet programs.



Self-serve portal

The Brevity Self-Serve portal is a platform for the support workers to manage their own roster and care management for their clients. Support workers and team leads can see a list of clients assigned to them by the Admin and can see their profile information, funding info, documents and care notes all in one place.

They can record session details as billable or non-billable against a budget item from the client profile screen. This will record a timesheet and care note at the same time. The system will not allow recording of billable times if outside funded period or budget has been used.

Support workers can schedule shifts for their clients and can then add a timesheet/record against it when it is complete, all of these are done in an interactive calendar in the portal, so that they get a better view of when the shifts are scheduled and for which clients, they can change the calendar view to week, fortnight or month to display the shifts and their details.

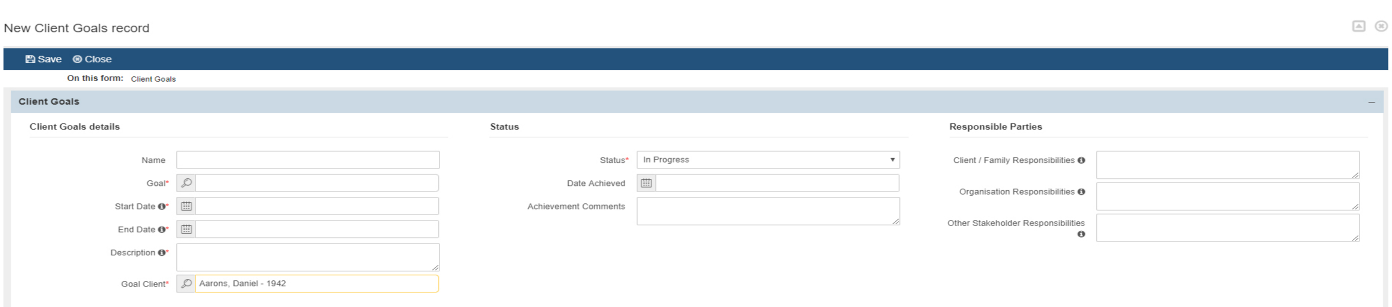
Plan Review

The plan review functionality in Brevity allows you to schedule reviews of a clients plan, to ensure they are making progress toward their goals, and to prepare them for their plan review.

Creating Plan Reviews

Plan reviews are created via the plan review section on the client profile.

This allows you to create set periods for the plan review, as well as record feedback for each review..



Name: This is the name of the goal that you want to create.

Goal: This is the goal of the client. You can create a goal record by clicking on the goal field and then clicking on the + sign on the lower right. You can also create a goal by going to the Administration from main menu and then clicking on Goal Template.

Start Date: This will be start date of the client's goal.

End Date: The end date of the client's goal.

Description: The description of the client's goal.

Goal Client: This is the client that will apply the goal. Usually this is filled in if you created the goal from the Client's Profile.

Status: You can set the status of the client's Goal from this dropdown.

Date Achieved: The date where the client's finished the goal.

Achievement Comments: The comments for the client's goal after achieving the goal.

Plan Review Reminders

Plan review reminders will show on the dashboard within the Client Funding section...

Client Funding 34

CLIENT NAME	Type	Start Date	End Date	Type of Funding	Expiring in Days	Balance
Wally Hutson	Individual	03-03-2018	30-03-2018	NDIS, NDIA	-248 days	$12961.64
Wally Hutson	Individual	17-11-2017	26-04-2018	NDIS, NDIA	-221 days	$0
Frank Flemingt	Individual	07-10-2017	08-05-2018	NDIS, NDIA	-209 days	$4569.76
Robin Banks	Individual	15-03-2018	14-05-2018	NDIS, NDIA	-203 days	$4762.8
Don Stairs	Individual	30-04-2018	25-05-2018	NDIS, NDIA	-192 days	$7329
Donald Bump	Individual	01-02-2018	01-06-2018	NDIS, NDIA	-185 days	$0
Donald Bump	Individual	01-02-2018	03-06-2018	NDIS, NDIA	-183 days	$2605.26
Anna Mull	Individual	10-01-2018	06-06-2018	NDIS, NDIA	-180 days	$1142.6
Donald Bump	Individual	15-12-2017	15-06-2018	NDIS, NDIA	-171 days	$0
Ackue Barb3	Individual	13-02-2018	09-07-2018	NDIS, NDIA	-147 days	$6972.48
Graham Cracker	Individual	30-06-2018	10-07-2018	NDIS, NDIA	-146 days	$5396.48
Greta Life	Individual	04-03-2018	24-07-2018	NDIS, NDIA	-132 days	$19368.8

Plan Review on Self - Serve Portal

The Plan review can be viewed by the Self - Self Employee from the Self - Serve Portal. They can create a client's goal from the self - serve portal.

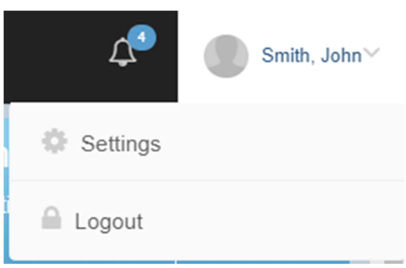
You can view the self serve portal guide for the complete instruction on how to create a goal from the self - serve portal. (see Self-Serve Portal Guide)

Brevity Billing Portal

You are now able to manage the billing information, credit card details and invoices for your Brevity account via the Brevity Billing Portal. This portal is accessible by all Admin users.

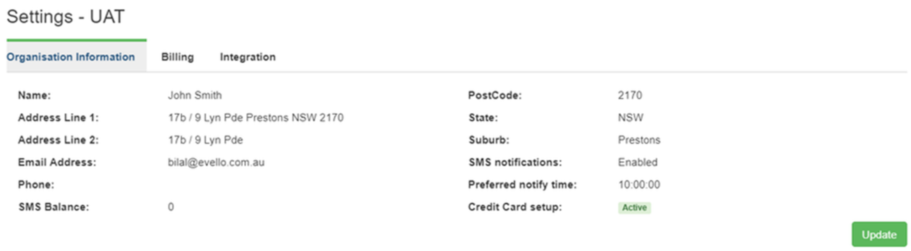
Accessing the Billing Portal

To access the billing portal, within Brevity, click on your name in the top right once logged and select the *Settings* option.



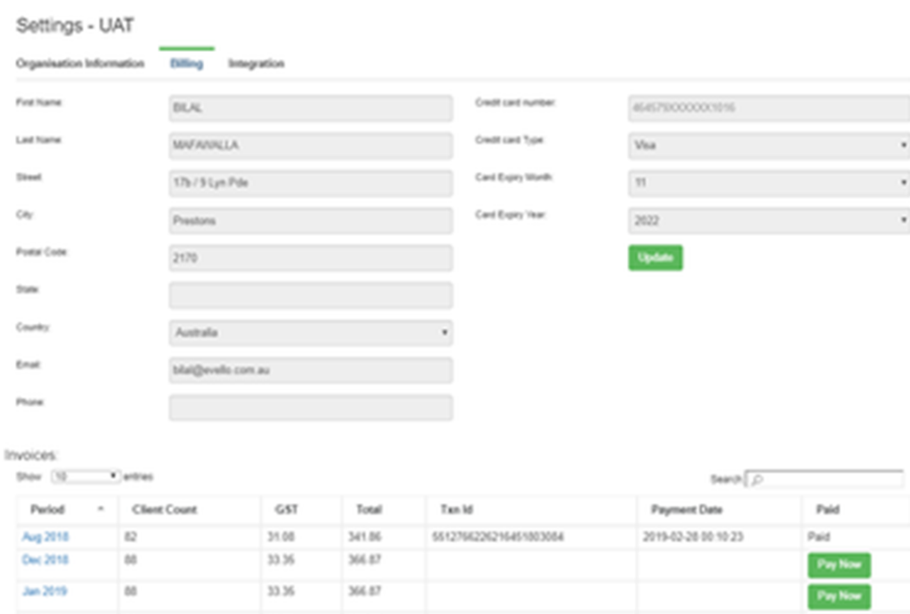
Updating Organisation Registration Details

The first tab on the settings page allows you to update your Organisation Billing information. To update, click the *Update* button at the bottom of the page, make required changes, and save to apply the changes.



Viewing Invoices and Updating Credit Card Information

The *Billing* tab on the setting page allows you to link or update the credit card used for payments. You are also able to see past invoices and pay any unpaid invoices from this tab. To add or update the credit card details for your account, click the *Update* button on the right side of the page, update with required information, and save to apply the changes.



Integrations

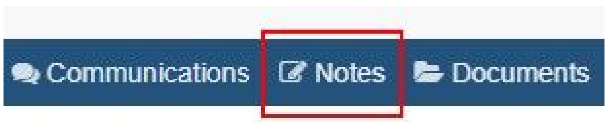
The *Integration* tab allows you to enable third party integrations for your instance. It allows allows you to enable SMS notifications, and purchase SMS credits.

Brevity Notes

There are different notes that you can use in Brevity. Each note has different functions. In this guide, we will discuss the different notes that you can use in Brevity.

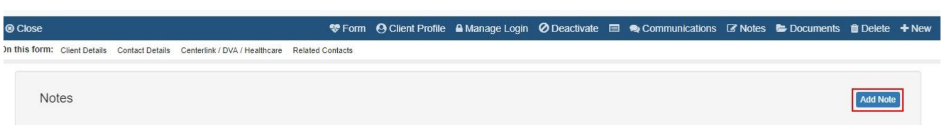
General Notes

You can create a note by clicking on the notes from either the Client's Profile or the Employee's Profile. General notes are accessible only in the Client's or Employee's Profile.

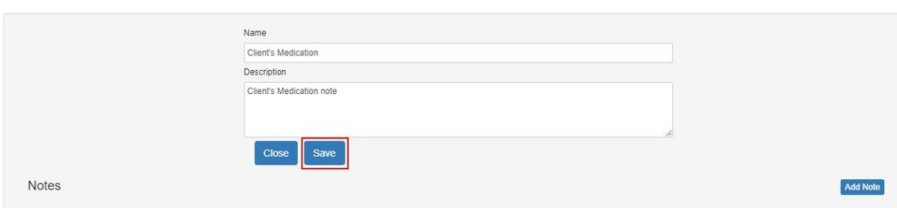


Adding General Notes

It will open the General Notes section where you can add / edit a note for the Client or for the Employee. You can add a note by clicking on the add note button.

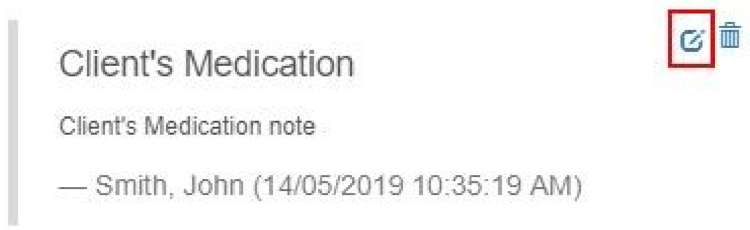


It will open a section where you can add or edit the notes. Once you created a note, click on the save button to create the note.

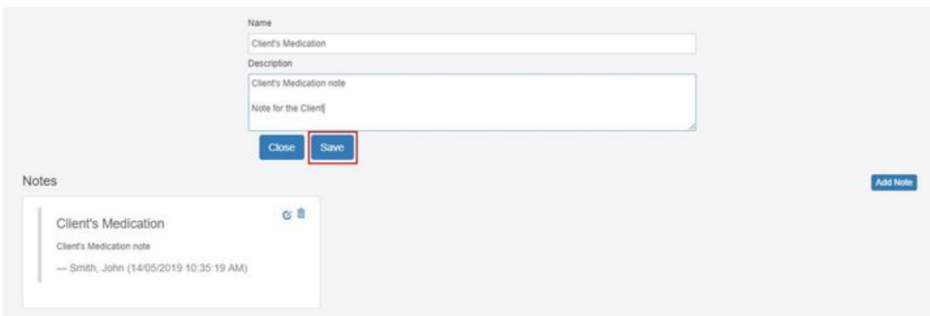


Editing General Notes

You can edit the General Notes by clicking on the edit button. It is the square with a pen on the upper right portion of the note.

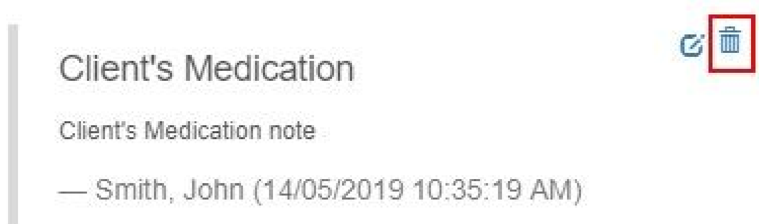


Edit the note and once you are done, click on the save button to save the edited note.



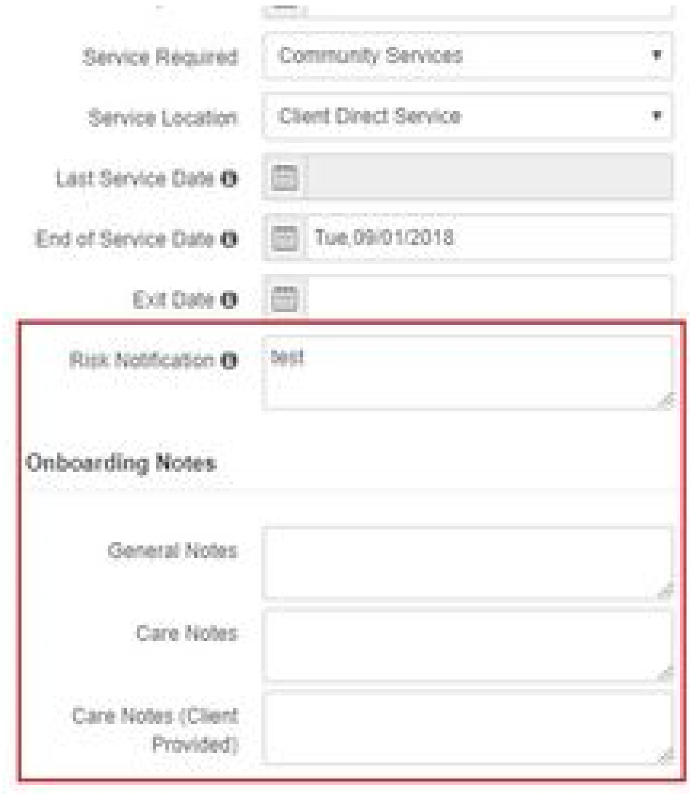
Deleting the Note

You can delete the note by clicking on the delete icon. Once you deleted a note, you cannot retrieve it so be careful in deleting notes.



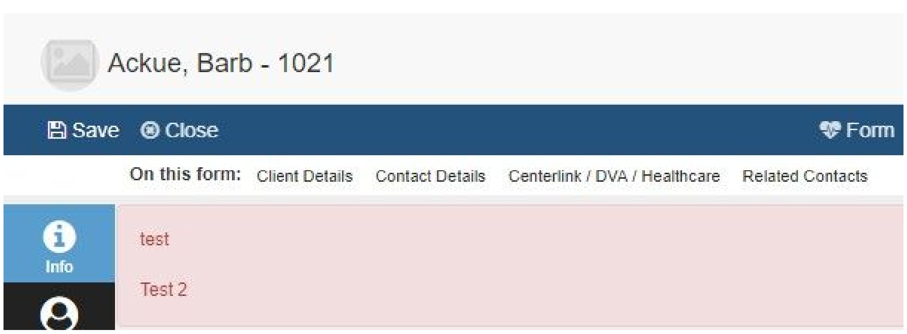
Client's Notes

You can find the client notes from the right side of the client's profile. These notes can be seen by the care workers from the Brevity Mobile App and other section of Brevity. You need to click on the save button after creating a note for the client to save it.

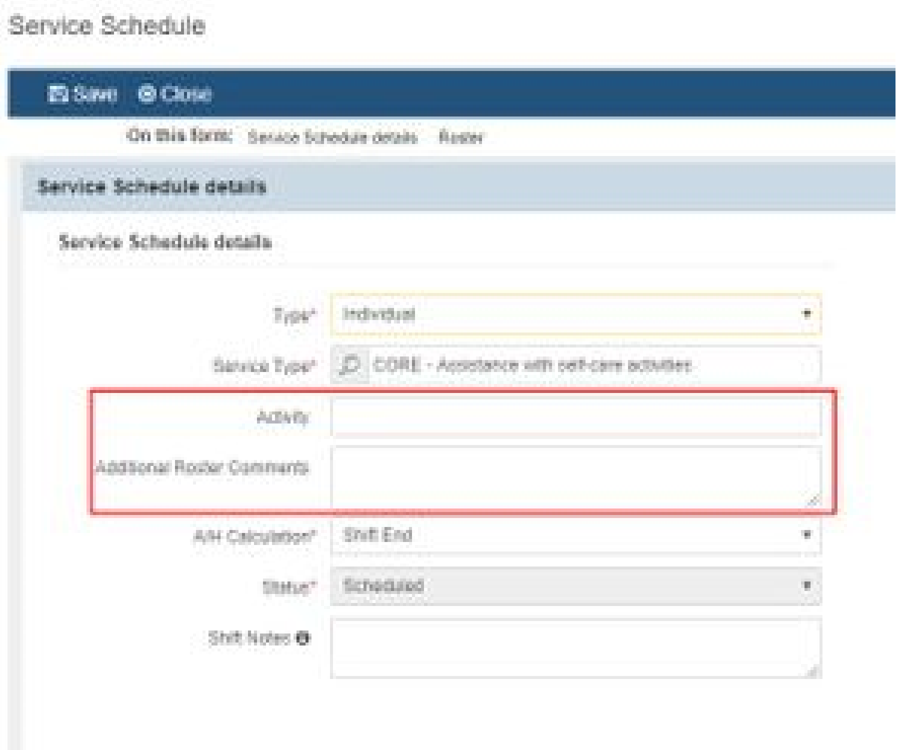


Risk Notification

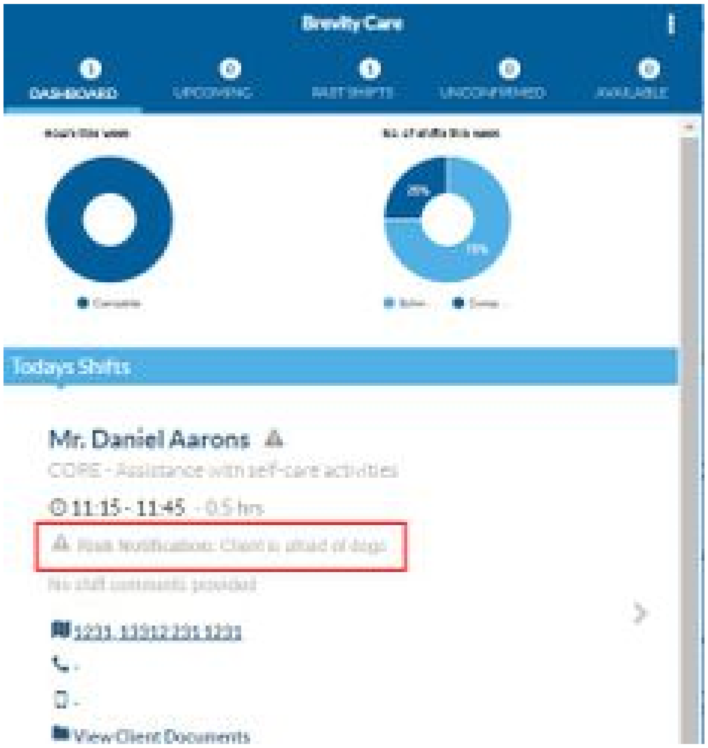
When you open the Client's Profile, Risk Notification will appear on the top of the Client's Profile in red text.The risk Notification is a multi line text so you can create several notes for risk notification.



When you view the client's service schedule, it will also show the risk notification.

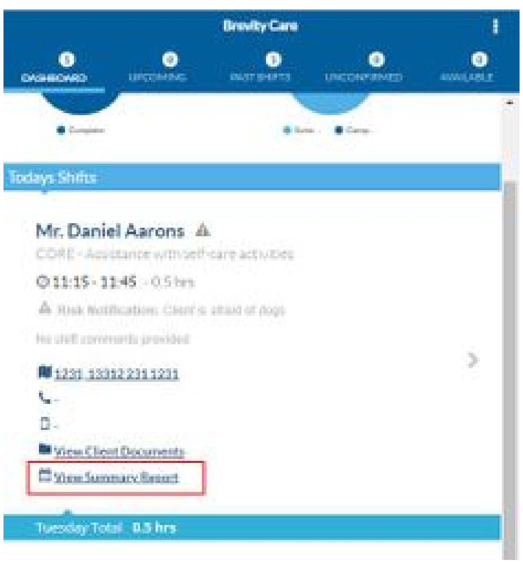


From the Brevity Mobile App, if the support worker click on the name of the client, it will show the risk notification of the client.



Onboarding Notes

Unlike the Risk Notification, Onboarding notes can only be seen from the client's profile and from the Brevity Mobile App. From the Brevity Mobile App, click on the client's name to show additional menu and then click on the "View Summary Report".



It will open the page where it will display the client's information. On this page, you can also see the onboarding notes.

Activity Notes and Additional Roster Comments

Activity Notes are notes that can be used to specify the activity for the client's service schedule. You can use this to let the support worker know what will be the activity of the client. You can also use this note for different purpose like the client's pick up location.

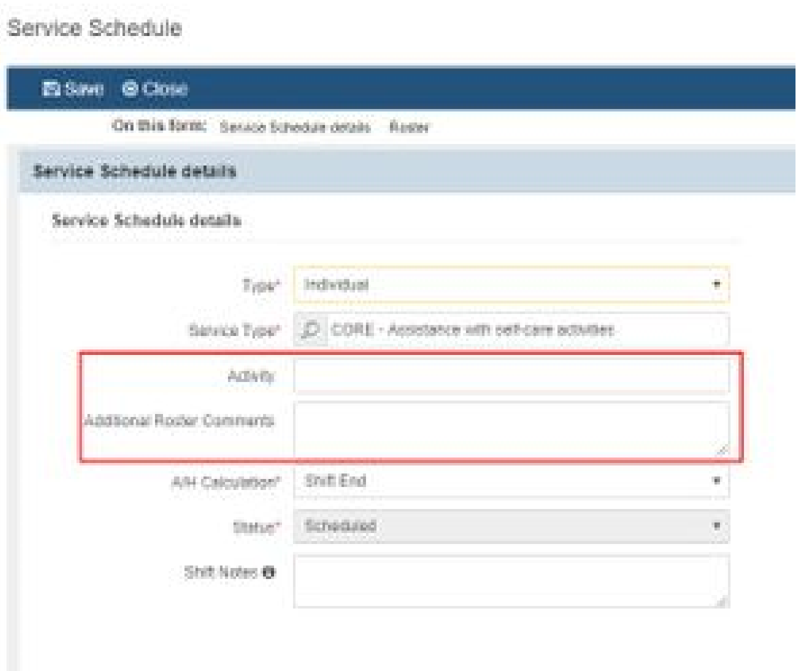
Activity Notes from Service Schedule

You can create the activity notes by opening the service schedule of the client. There are several ways to open the client's service schedule:

1. **Schedule Board:** You can open the client's service schedule by double clicking on the service schedule.

2. **Client Services:** You can click on the calendar icon under the client's name so it could list all the service schedule of the client. On the list, double click on the client's service schedule to open it.
3. **Clients > Service Schedule:** You can open the client's service schedule by going to the Clients from the Main menu and then clicking on the service schedule from the sub menu. On the list, you can use the search box to search for the client's name and then double clicking on the client's service schedule to open it.

After opening the service schedule, you will see the activity notes from the left side of the service schedule page.



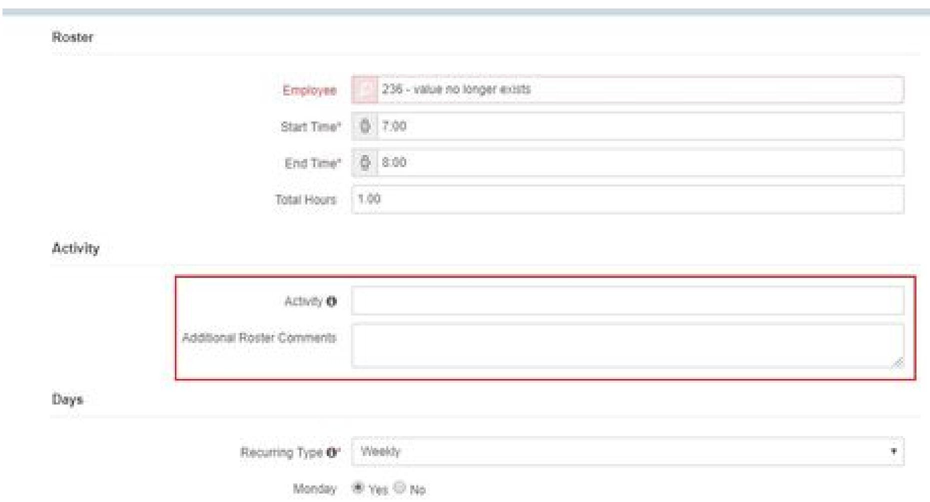
Activity Notes from the Service Schedule Template

You can create an Activity Notes from the Service Schedule Template. This will copy the activity notes to every service schedule of the client that you will create. There are several ways to open the client's service schedule template.

1. **Schedule Board:** Click on the paper icon on under the client's name. It will open the client's service template. Double click on the Service Schedule under the items section to see the activity notes of the service schedule.

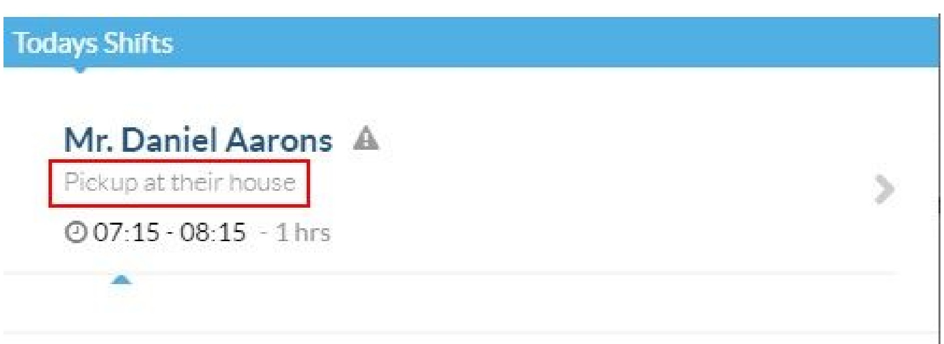
2. **Client's Profile:** You can open the Service Schedule Template from the client's profile. Double click on the service template to open it. Same with number 1, double click on the service schedule under the items section to see the activity notes.
3. **Clients > Service Schedule Template:** By going to this page, it will list all the service schedule template of all the clients. Double click on the service template of the client from the list and then double click on the service schedule template under the items section.

You will see the activity notes from the right side of the page.

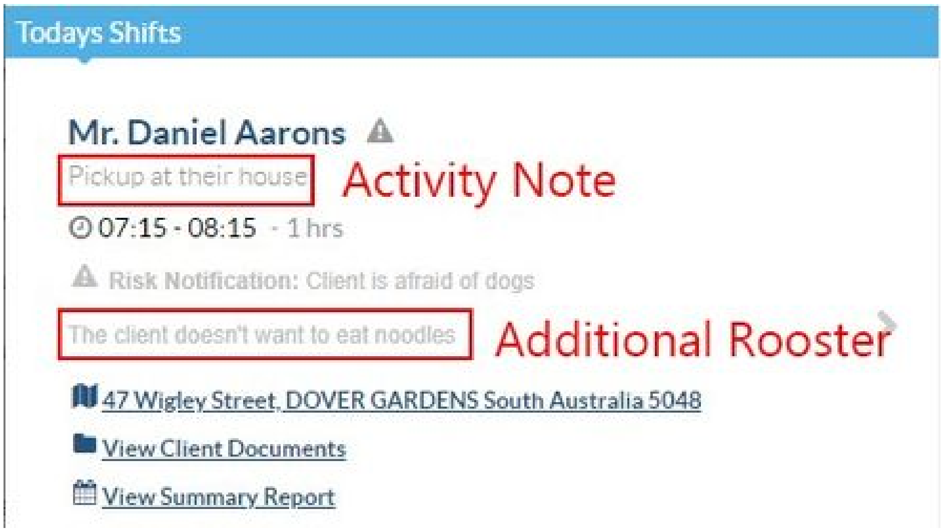


Activity Notes in Mobile App

The support worker could see the activity notes and additional rooster comments from the shifts page. The Activity Notes can be seen quickly under the Client's Name

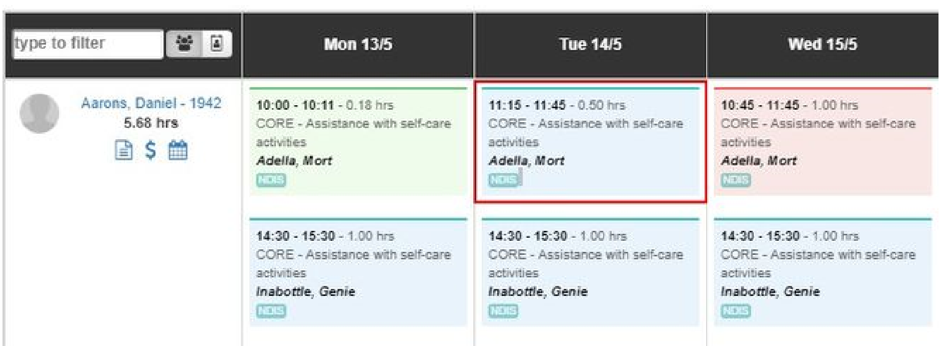


If the support worker tap on the client's name from the app, it will show the additional rooster comments.

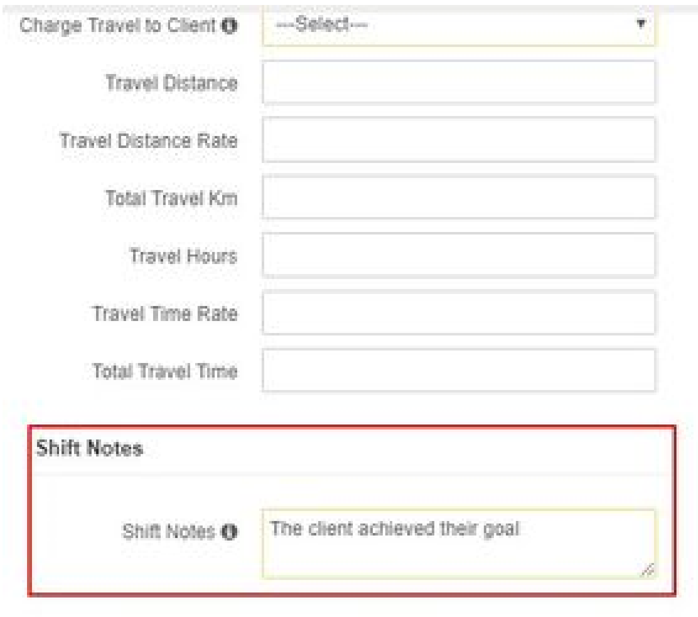


Shift Notes

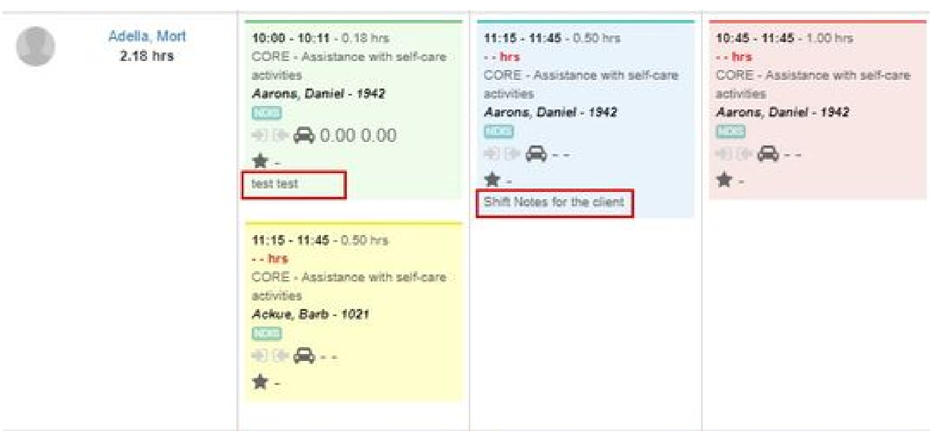
Shift Notes are notes for the service schedule of the client. These notes are usually inputted by the employees from the Brevity Mobile App or from Support Worker App. You can view the shift notes of the client by double clicking on the shift of the client from the schedule board.



Scroll down until you see the shift notes of the employee. The notes can be found under the shift notes section. You can add a note by typing the note from the shift notes field and then clicking on the save button.

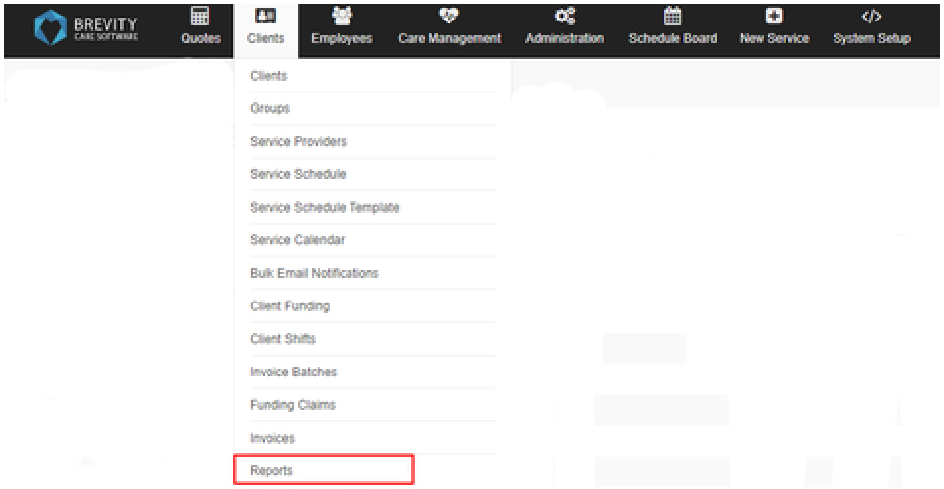


You can also see the shift notes by going to the Employees and then clicking on the approved timesheets from the sub menu. The shift notes can be found under the shift of the employee.

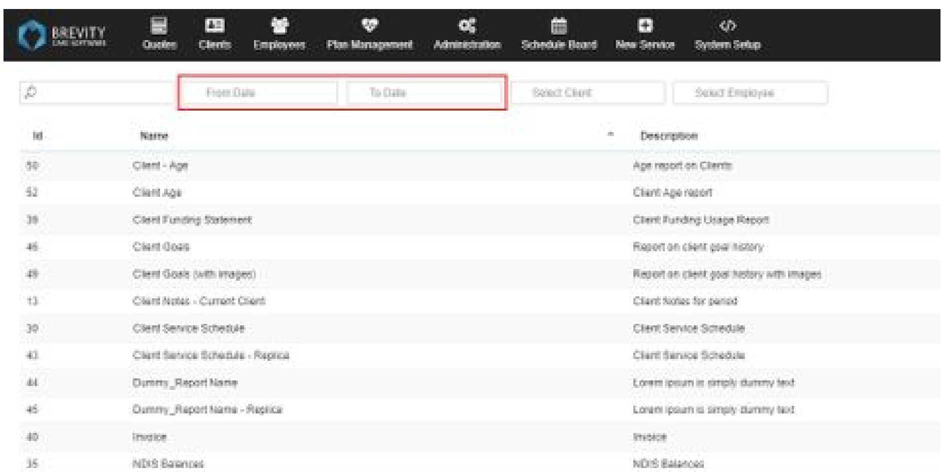


Viewing multiple Shift Notes

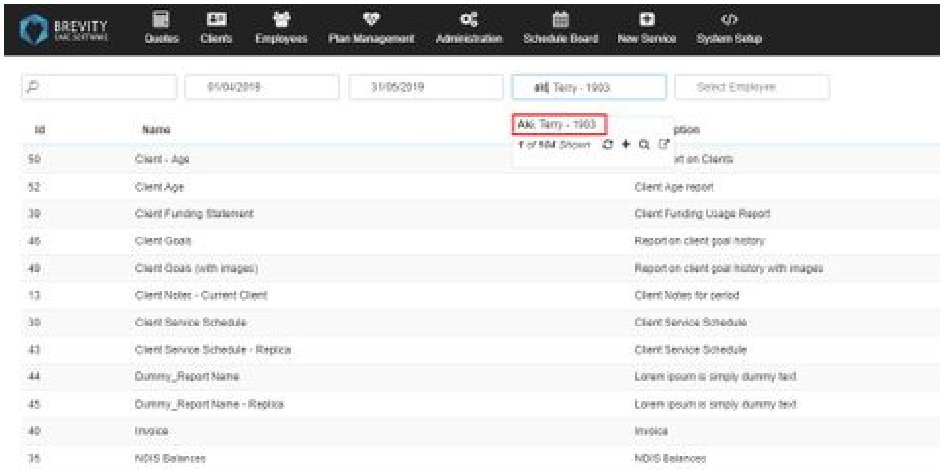
You can view the shift notes for a specific date(s) of the client(s). You can do this by going to the client from the main menu and then clicking on the reports from sub menu.



Include the dates of the report by filling in the from date and to date fields.

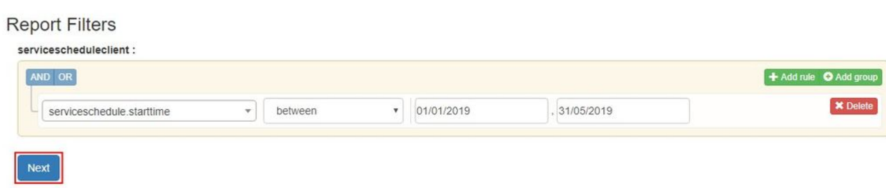


If you want to view the report for a specific client you can type the name of the client and click on the client's name from the list to link the client.



Double Click on the Client Service Schedule from the list to create a report and view the shifts notes

It will open the filter page. Click on the next button to generate the report.



From the report, you can view the shift notes of every shift for the client from the shift notes column of the report

Client Service Schedule