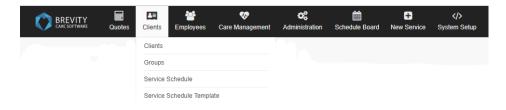


# **Getting Around**

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.



<b>+</b> N	ew CR	EGR 4					<b>▼</b> Filter	⊇ Mail Merge ≱ Import	B Dekte D Dq
Þ		5							6 Show 50
٣	id	Name	Type	Job Type	Enal	Home Phone	Mobile Phone	Suburb	Date Started
0	191	Adamia, Mack	Employee	Nursing Services	sample 191@brevity.caresoftware.com	0298178699	0444719254	Fairfield West	05-06-2917
0	109	Adela, Mort	Employee	Nursing Services	sample109@trevitycarecoftware.com	0293791320	0455129100	BONNYRIGG	10-04-2017
0	203	Ani, Sal	Employee	Correctic	sample203@trevitycarecoftware.com	0294739586	0419955240	Green Valley	
0	207	Anoma, Mel	Employee		sample207@brevitycaresoftware.com	0299390282	0436171305	Cabramatta West	
0	282	Body, Abel	Employee	Nursing Services	sample202@trevitycaresoftware.com	0299796068	6402322372	Cartiley Heights	11-09-2017
0	188	Calve, Barry	Employee	Nursing Services	sample100@brevtycaresoftware.com	0294796068	0424952344	Smitheid	01-08-2017
0	205	Der, Cathy	Employee	Nursing Services	sample205@brevitycaresoftware.com	0291467478	6423222472	Carriey Vale	64-09-2017
0	204	Derr, Colin	Employee	Care Services	sample204@trevitycaresoftware.com	0295764534	0417051916	NORTH SYDNEY	62-11-2017
0	190	Diation, Ray	Employee	Nursing Services	sample 190@brevity.caresoftware.com	0295625616	0463497968	BONNYROG	29-05-2917
0	222	Dorporal, Lance	Employee		sample222@trevitycarecoftware.com	0299771326	0413016015	Bonnyrigg	
0	199	Doubt, Tucker	Employee		sample 199@brevity carecolit-are com	0292041865	0413682399	CABRAMATTA WEST	25-06-2017
0	214	Ficial, Benny	Employee	Nursing Services	sample214@brevtlycaresoftware.com	0298387726	0449594562	Chipping Norton	14-06-2017
0	187	Furter, Frank	Employee	Nursing Services	sample187@trevitycaresoftware.com	0298106718	0452025105	Peakhurst	

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 (<u>Selecting Multiple Record from the List</u>)

## **Record Edit Screen (or Record Form)**

Allows creation of new records or editing of existing records.

1		Test, Demo - 1934						2 #Hone / C	Client List / Details	
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ł	8	Client Details			Care Workers	8	Service Details			
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	jî8 [i⊂ i[e• ji8 ¦i8 ji8 ]] > [¢	Place of Birth Country of Birth	P 12	. 8		+ Previous Need	General Notes Care Notes	13		

- 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.

Country of Birth	Q	Australia	
		Australia New Zealand	
		2 of 3 Shown	S + C 🛛

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

Dear user, log in to access the application	
Usemane	
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. <u>See System Dashboards</u> page for the full instruction how to customize the System Dashboard)

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# **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



Guotes	Clients	Employees	💝 Care Management	¢¢ Administration	Schedule Board	New Service	<∕> System Setup
	Clients						
	Groups						
	Service I	Providers					
	Service	Schedule					
	Service :	Schedule Tempi	late				
	Service	Calendar					
	Bulk Em	al Notifications					
	Client Fu	nding					
	Client St	vitta.					
	Invoice 8	latches					
	Funding	Claims					
	Invoices						
	Reports						

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

Cuotes	Clients	Employees	😍 Care Management	<b>¢</b> Administration	Chedule Board	New Service	<∕> System Setup
		Employees	100				
		Employee S	hifts				
		Available Sh	ifts				
		Availability S	earch				
		Service Cale	ndar				
		Approve Tim	esheets				
		Timesheets					
		Bulk Email N	lotifications				
		Employee Lo	ave				
		Reports					

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	<u>Timesheets</u>
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

Quotes	Clients	Employees	👽 Care Management	<b>¢\$</b> Administration	Schedule Board	New Service	> System Setup
		-	Needs Assessment				
			Support Coordinatio	n			
			Service Delivery				
			Accidents / Incidents	s / Complaints			
			Communications				
			Reports				

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

<b>D</b> uckes	Clients	Employees	👽 Care Manapement	OG Administration	Schedule Board	D New Service	لې System Setup
				1. Languages	0.5	10	
				2. Qualification	65		
				3. Service Type	9.		
				4. Funding Sou	roes		
				5 Pricelets			
				6. Expense Typ	e5		
				7. Public Hulida	iya		
				8. Pay Rate Lo.	quite		
				9. Communicat	ion Templetes		
				10. Form Tamp	ieles :		
				11. Goal Tempi	ates		
				Sync Xero			
				Sync Myob			
				Branct Satup			



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



On this form. Savina Schartun-	was finte			
rvice Schedule details				
Service Schedule details		Hours		
7:04*	Indexing 1	that hise		0110
Ciret .	(A)	the first	8	(0) 1.40
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Parent	2.	Admit Hours 0		
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lines of	* vec 0 rev		Dise different and to plan if temperate	
		Charge Travel to Direct Ø	- Gand-	
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		Travel Delance Hate 8		

# System Setup Menu

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

Create Table			Add Table
Stor 15 • entires			Beauty.
Table Name	11 Display Name	II is Published	Adden
account	External Provider	True	East Field, Faunz Veest Relationships Editor
appraisat	Appranal	Thur	Edd Fields Frame Vews Malalamana Colds
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clerigosprogress	Client Goal Progress	True	Eat Faith Farme Sweet Belanceses Belan
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Showing 1 to 10 of 108 wells	es.		Provine 1 2 3 4 5

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:

Use Public Transport	# Home /	Goal List / De	tails
E Save O Close	🖉 Deactivate 👒 Communications 🕼 Notes 🐸 Documents 🛢	Delete +	New
On this form: Goal details			
Goal details			4
Goal details	Goal Tasks		+
	Name		
Name Use Public Transport	Purchase Correct Ticket with Correct Change	Û	
	Finding correct platform	Û	
	Catch correct train	Û	
	Embark at correct station	Û	
	Find way to destination after embarking	Û	
	Showing 1 to 5 of 5 entries	Previous	Next



## **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):

Name	Status	Start Date	End Date	
Use Public Trains	In Progress	01-05-2018	31-12-2018	
Use public transport	In Progress	01-05-2018	01-11-2018	

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:

Status         Status         Responsible Parties           Name         Add, Terry - 195.3         data/r*         In Program         Cherl / Family Responsibles @         Cherl / Family Respons	Name     Ad. Terry - 1950     Statur     In Progress     Client / Famo       Goalt <sup>®</sup> © COTE: -Assistance with personal dome     Date Achieved     Im       Stat Use <b>4P</b> Im     Date Achieved     Im       Stat Use <b>4P</b> Im     Achieved et Comments     Organisation       End Use <b>4P</b> Im     Achieved E Comments     Other Achieved		Status	Decessarilitie Decelars	
Oper     COTE: - Austances with personal dome     Date Active     Image: Context on the personal dome       Start Date OF     Image: Context on the personal dome     Active     Image: Context on the personal dome       Start Date OF     Image: Context on the personal dome     Active     Image: Context on the personal dome       End Date OF     Image: Context on the personal dome     Active     Image: Context on the personal dome       End Date OF     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome       Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome     Image: Context on the personal dome <th>Our     COE     CAUSE - Ausstance will personal dome     Date Activated     Presponsation       Start Date OP     Ths: Joint 102018     Activativate Comments     Organisation       End Date OP     Mini, 10120018     Activativate Comments     Organisation       Description OP     Ansite Thery to cosh flood     Presponsations OP</th> <th>Name Aki, Terry - 1900</th> <th></th> <th>nesponence rands</th> <th></th>	Our     COE     CAUSE - Ausstance will personal dome     Date Activated     Presponsation       Start Date OP     Ths: Joint 102018     Activativate Comments     Organisation       End Date OP     Mini, 10120018     Activativate Comments     Organisation       Description OP     Ansite Thery to cosh flood     Presponsations OP	Name Aki, Terry - 1900		nesponence rands	
		Cost* COSE - Assistance with personal domes Start Date OF The 2011/2018 End Date OF Multi-2011/2019 Description OF Assist Terry to cost field	Date Achieved	Responsibilities (* Organisation Responsibilities (* Other Statemolder	

### **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

atch correct train 40%  Needed a bit of guidant mbark at correct station Did wel Did wel Did wel
Inding correct platform 50%
Calch correct train 40%
Embark at correct station 80%
Ind way to destination after embarking 90%

## **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:

ruff, Dan -	1958 01/05/2018 to	31/06/2018			BREVIT CARE SOFTWA
-	Public Trains ement 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
) . 01-3x+-2008	70% Completed but with hesitation	100% Did well	100% Cvd well	60% Distracted on train and did not, pay attention to stops	70% Found way after a bit of effort.
00.3cm2018	90% Did well	90%	90% Dd well	90% Did well	100% Dd well
3	80%	60%	40%	90% Dd well	80%
	80%	83%	77%	80%	83%
	80% Cvd well	60% Dd wel 83%	40%	90% Did well	80% Cid well
	Purchase Correct Ticket with Correct Change	Finding correct platform	Calch correct train	Embark at correct station	Find way to destination allo embarking
) . 01-3an-2018	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.

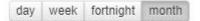
### Filtering on the board

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

all filtered 🕽

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).

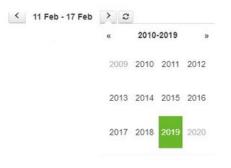


< 11 Feb - 17 Feb	>	0				_	
	ec.		Ju	ne 20	18		30
	Su	Mo	Tu	We	Th	Fr	Sa
	27	28	29	30	31	1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	1	2	3	4	5	6	7

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

ec.	20	18	20
Jan	Feb	Mar	Apr
Мау	Jun	Jul	Aug
Sep	Oct	Nov	Dec

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...

DEMO1	۳	
All		
DEMO1		t
DEMO2		0
	All DEMO1	All DEMO1

## **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.

All		20	4	1	all	filtered	5
-----	--	----	---	---	-----	----------	---



## 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



	Albert, Steve - 1940 10 hrs	7:00 - 9:00 - 2:00 hrs CORE - Assistance with self-care activities Ow, Low	7:00 - 9:00 - 2:00 hrs CORE - Assistance with self-care activities Ow, Low	7:00 - 9:00 - 2:00 hrs CORE - Assistance with self-care activities Ow, Lou	7:00 - 9:00 - 2:00 hrs CORE - Assistance with self-care activities Ore; Low	7:00 - 9:00 - 2:00 hrs CORE - Assistance with self-care activities Original Core - Cor	
	Banks, Robin - 1906 8 hrs R \$ 100 8 \$	11:00 - 13:00 - 2:00 hrs COS - Coordination of Supports Brown, Alex	7:45 - 9:45 - 2:00 hrs CORE - Assistance with self-care activities Doubt, Tucker	11:00 - 13:00 - 2:00 hrs COS - Coordination of Supports Ruse, Bella		11:00 - 13:00 - 2:00 hrs COS - Coordination of Supports Brown, Alex	
9	Banks, Sophie - 1946 4 hrs S	7:45 • 9:45 • 2:00 hrs     A     CORE - Group Based Activities In     A Centre - Ratio 1:4 - Standard     Select Employee     CO	12:15 - 13:15 - 1.00 hm A CORE - Group Based Activities in A Centre - Ratio 1:4 - Standard Select Employee	14:00 - 16:00 - 2:00 hrs CORE - Group based activities in a centre - corre Mediran, Nowell Harvey			14-09 - 16:00 - 2:00 hrs CORE - Group based activities in a centre - core Ruse, Relis
	<u>_</u>						

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.

Banks, Sophie - 1946 4 hrs S	7:45 - 9:45 - 2.00 hrs A     CORE - Group Based Activities in     A Centre - Ratio 1:4 - Standard     Select Employee     COR	12:15 - 13:15 - 1.00 hrs CORE - Group Based Activities In A Centre - Ratio 1:14 - Standard Select Employee	14:00 - 16:00 - 2:00 hrs CORE - Group based activities in a centre - core Mediran, Nowell Harvey		18.00 - 18.00 - 2.00 hm CORE - Group based activities in a centre - come Reset, Befar COD
Barracuda, Yolandad - 1003 7 hrs S	9:10 - 11:10 - 2.00 hrs A CORE - House and lor yard maintenance Dalive, Barry		9:10 - 11:10 - 2.00 hrs A CORE - House and/or yard maintenance Dative, Barry	the + 11:10 - 2:00 hrs     COTE: House and/or yard     maintenance     Date, Barry     COTE:	
	12:30 - 13:30 - 1.00 hrs CORE - Group based activities in a centre - core Derr, Celin				

## **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.

🝃 Documents

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



### Working with the Document Management Panel

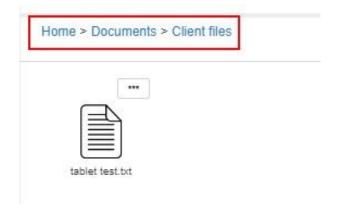
From here you are able to:

- 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**

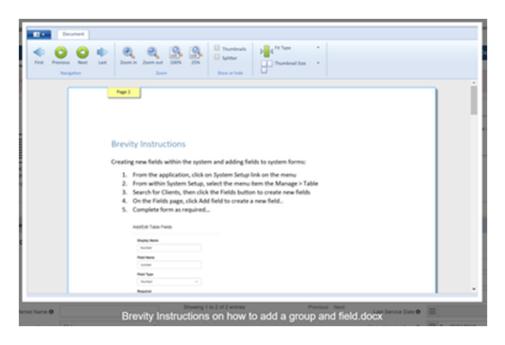
You can go to the different folder by using the navigation tab. You can click on the tabs to go to the previous folder. You can open a folder by clicking on the folder that you want to open.





## **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:

	List Active le					# Home / Lead List
- Ne	w 🕑 Edit				🝸 Filter 📓 Mail Merge 📓 SA Template	e 🚊 Import 🍵 Delete 😒 Export
Ø						Show 50
6	id	Name	First Name	Last Name	Email Address	Phone
		Doe, John	John	Doe	john@sample.com.au	123456

## **Creating a Lead**

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

0	BREVITY	Quales Client	Engkyees	💝 Care Management	Q <sup>e</sup> Administration	Echedule Board	New Service	<∕> System Setup			Ĺ	?	D tests	lanı~
Lead	List Adva	isat: O										# Hom	/ Lead Lis	z
+ No	w 🕅 Edit							-	🕇 Filter 📓 Mail Merge	SA Template	<b>≥</b> Import	8 Delete	E Expo	rt
p													thow 50	•
5	ы	Name		First Name		Lost Name		Email Addr	eas		Phone			
0	3	Dok, John		John		Doe		john@sampie	L. COM. AU		123456			
0	4	Dox, John		John		Doe								
0	7	Austin, Michael		Nicheel		Austin		michael austi	n@pmail.com		0455815	236		
0	8	Albert, Steve		Steve		Abert		steveabertig	gmail.com		0451 224	625		
0	9	test, test		test		test		test						
0	10	Oolath, David		David		Golath								

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.



O 1999 .	Re .	Cherth		Care Management	<b>Q</b> Admonstration	10mile		C New Server	() typen tieter		4	
New Lead record												Level Lat / Details
E Sine @ Ckor												
Que then form: O	ensi de	10.00										
Details												
Lasel dytalls					Address					Class Funding Details		
Enabling Diated Br	0 0	-				A00101	45 Tang	er Drot		Fainting Issurger	D 105	
Forthane	100000					5440	VELON	EUVE .		Pagetator Netland		
Last Name	Largen					Dete	Queers	100		Provider	(D) 1009 1919	
Cale of Setti	<b>三</b> 14	AVE 1				Palade.	(014))			Follow up Reminder		
Erral Address	granula		d cont									
Representative Name 🖶										Feltra up Calla 💇	E 844.181220118	
Press	227) 349	0.1421								Approval (Hape)	Clube Acceptorue	•
-												
Bervices												
Services												
Plana over transfer and												

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

rices				
ervices				-
Service Type	From Date	To Date	Budget	
o data available in table				
owing 0 to 0 of 0 entries				Previous Ne

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:



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Otherhow Jacobian									
annina Dataliti									
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	(A) Day and		100						
from Dept."	(i) solvering	Decoming Spin	7945						
in tase	(B) Second and	Anima Singe	#	0.54	if not	10 100	10.00	10 100	11 her
benother	[2] (1995 - Assessed and present dynamic activities	shakonal Tang		-3		<b>E</b> .3	-	-3	<b>_</b> 0.
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fair F									
Net 2 & 1 to 1000, Familiance with personal fermion Relief famous 2000 (0	Among Children, Children								
tie3									
Mark & Arrowson with pressing fermation									

#### 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.

Service Type	From Date	To Date	Budget		
ORE - Assistance with self-care activities	01-03-2019	29-03-2019	150000.00	Û	
ORE - Access Community, Social And Rec Activities - Level 1	01-03-2019	31-03-2019	150000.00	<b></b>	

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

Save Close			Deadiva	e Com	NUMBER OF STREET	Of Notes	Decom	ents BDe	sde. +Ne
vice Details									
ate Rule Details		Applicable Days							
Lent	P Lanas Jeany		Lock Hea	-0	•				
Trion Date?	0 AC01032018	Recurring Type							
To Date!	色 Pr.26422019	Bellect Days	10 stor	Wite.	Rent	NT0	Res.	Obe.	1254
Service Toper	(2) CONE Assistance with set care activities	Pathenad Time					-		
forget	100000.00	Mari Tone	9425	1620	16.25	14.25	14-28	1428	1425
Description 0		Paula .	0.00	0.00	2.00	1.00	2.00		
Tatul Hours'	54.00			-		Particular .	- Comment		
Allow Pulliki Hambles	C vec # As	Stars proce in p	-	Pre	•				
		Utilised bodget: \$2505.06 efform: bodget: \$45760.44 Weaks Cover: 4 Weaks Toolet: 4							
40									_



#### **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.

Services				
Service Type	From Date	To Date	Budget	
CORE - Assistance with self-care activities	01-03-2019	29-03-2019	150000.00	Û
CORE - Access Community, Social And Rec Activities - Level 1	01-03-2019	31-03-2019	150000.00	Û

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

trial1.brevity.com.au says		
Are you sure you want to delete this record?	?	
	ок	Cancel

## 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:

Lamaro, Jeremy						🖷 Home	e / Lead List	/ Details
Save 🐵 Close		C Proposal	O Deactivate	Section Sectio	<b>Notes</b>	Documents	î Delete	+ New
On this form: Lead details Services		· · · · ·	5					
ead details								
Lead details	Address			Client Funding Deta	ails			

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.



BRE	VITY	Guotes	Clients	Employees	😵 Care Management		<b>55</b> istration	Chedule Board	Hew Servic	ce System Setur
Name: Email Add Phone:	iress:	Jeremy Lamar Jeremy/amaro (07) 3490 143	@test.com							
Sr. No.	Service				Period		Budget (\$)	Leftover (5)	Weeks cover	Total hours
1	CORE - As	sistance with s	elf-care activi	ties	01/03/2019 - 29	03/2019	150000	147544.86	3	51.00
2	CORE - Ad	cess Communi	ty, Social And	Rec Activities - Leve	1 01/03/2019 - 31/	03/2019	150000	146915.66	4	105.00
Show J	Prices in pri	nt? Print C	Care Plan	Select Templa	te 🔻 Gene	rate Ma	il Merge		Apri	
March									ADM	
	- CORE - A balance: \$1		self-care act	ivities (01_011_0107	_1_1) \$144,42					

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

BRE	VITY	Guotes	Clients	Employees Ca	😵 are Management	<b>O</b> Adminis	<b>C</b> tration	Schedule Board	+ New Servi	() se System S
Name: Email Ado Phone:		Jeremy Lamar Jeremylamaro (07) 3490 143	@test.com							
Sr. No.	Service				Period		Budget (\$)	Leftover (S)	Weeks cover	Total hours
1	CORE - As	sistance with s	elf-care activ	tes.	01/03/2019 - 29/0	0/2019	150000	147544.86	3	51.00
2	CORE - Ac	cess Commun	ty, Social And	Rec Activities - Level 1	01/03/2019 - 31/0	8/2019	150000	146915.66	4	105.00
2		cess Communi			01/03/2019 - 31/0	13/2019			5) 7/1	

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.



<b>D</b> uckes	Clients	Employees	👽 Care Management	O <sub>6</sub> <sup>6</sup> Administration	Schedule Board	D New Service	لې) System Setup
				1. Languages		14	
				2. Qualification	6		
				3. Service Type	6		
				4. Funding Sou	rces		
				5 Pricelists			
				6. Expense Typ	bes .		
				7. Public Holds	aya		
				8. Pay Rate Lo	ading		
				9. Communicat	ion Templetes		
				10. Form Tamp	lates .		
				11. Goal Tempi	ates		
				Bync Xaro			
				Sync Myob			
				Brance Satup			

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.

				2. Upload Files
-			-	
sk templat e.docx	leadservices (1).dock	leadservices (4).dock	service agree ment.dock	

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.

Lead	d List Active lead	s 🛛								#
+ Ne	ew 🕼 Edit					<b>▼</b> Filter	🗟 Mail Merge	🗟 SA Template	道 Import	ВE
Q										
۲	id	Name	First Name		Last Name	Email A	ddress		Ph	one
0	2	Doe, John	John	1	Doe					
	Last Name	Doe		Suburb	Liverpool					



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.

0	BREVIT CARE SOFTWA	Y Quotes Clients	Employees	💖 Care Management	<b>¢</b> Administration	Schedule Board	+ New Service	> System Setup			4 <sup>29</sup> 🕕 si	mith, JohnƳ
Clier	nt List	Active Client List 📀									🚜 Home / Clie	ent List
+ Ne	w Bred	a							<b>▼</b> Filte	r 📓 Mail Merge	🛎 Import 🍵 Delete 📝 B	Export
Q											Show	50 🔻
۳	id	Name	1	Entry Date	Email			Mobile Phone	Home Phone	Work Phone	Suburb	
	1931											
	1903	Aki, Terry - 1903	01	1-09-2017	sample1903@brevity	caresoftware.com		0473690034	0290134709		Pairiewood	
	1904	Ander, Cory - 1904	14	4-08-0217	sample1904@brevity	caresoftware.com		0494106972	0292053692		Revesby	
Π	1916	Annenn Hal - 1916	07	7-11-2017	sample1916@brevity	caresoftware com		0493063409	0290640785		CARRAMATTA	

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.



Name     Modified     Action       Image: FinalMerge.docx     30 Jul 2018     Image: FinalMerge.docx       Image: I	Download template			
FinalMerge.docx     30 Jul 2018       Implate (1).docx     30 Jul 2018	Name	Modified	Action	
	FinalMerge.docx	30 Jul 2018	-	
	template (1).docx	30 Jul 2018	-	

#### **Download Blank Template**

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

0	BREVITY	Gustes Cients Employee	s Care Management Administration	b Schedule Board New Service System Setup				æ	One, 100
lient	t List 📧	two Client List @							Home / Client List
New	w GPEdit						τfiler ⊒Ma	iMege ≵impot ∎D	sele 🕃 Export
_	Download ten								
	o documento 1	uuni					±.∪pixed	Files or drog files here	
ρ									Show 50 .
0	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb	
0	1931								1
0	1903	All, Terry - 1903	01-09-2017	sample1903@brevtycarecoftware.com	0473690034	0290134709		Parrevood	
0	1904	Ander, Cory - 1904	14-08-0217	sample1904@brevfucaresoftware.com	0404106872	0292053692		Reverby	

#### 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

File	Home Inse	rt Draw	Design Lay	out	References	Mailings	Review	View	Develop	er Help
	👗 Cut	Calibri (Body)	• 11 •	A	🔾 Aa- 💝		1	•	<b>⊉</b> ↓ ¶	AaBbCcDd ,
Paste	🖷 Copy ؇ Format Painter	B	U - abe X <sub>2</sub>	x² 🛕	• <sup>ab</sup> / • A •	E =	∃ ≣	\$≡• .	<u>&amp;</u> - 🔛 -	1 Normal 1
	Clipboard 5		Font	_	E.		Paragraph		rs.	



#### Then select Customize the Ribbon option:

Customize Quick Access Toolbar...

Show Quick Access Toolbar Below the Ribbon

Customize the <u>R</u>ibbon...

Collapse the Ribbon

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

Customize the Ribbon and ke	yboard shortcuts.			
Choose commands from: Popular Commands Popular Commands Add Table Add Table Add Table Add Table Add Table Canter Change List Level Copy Copy Cost Deline New Number Format Deline Draw Vertical Text Box Deline Find Fint A Font Color A Font Settings	(in the section	N Deeps N Dayout N Dayout N Disferences N Disferences		* ¥
Fort Size Af Footbole Af Footbole Format Painter Comparison Insert Page Section Breaks Insert Pedure Insert Text Box Une and Perigraph Spacing		8 Diver 8 Developer 8 Million 8 Divelop	]	
Keyboard shortcuts: Cultomize		Import/Export *		
	Accept Revision     Add Table     Algo Left     Buffets     Conter     Charge Left Level     Conget Level     Comparise     Charge Left Level     Define New Number Format     Insert Format Painter     New Polsee     Insert Text Box     Line, and Paintgraph Spacing	Accept Revision     Add Table     Compt Level     Compt Level     Compt Level     Compt Table     Common	Accept Revision     Add Table     Bulles     Uner Table     Comparison     Composition Even     Composition Even     Composition Even     Composition Even     Composition     Compos	Accept Revision     Add Table     Add Table     Add Table     Add Table     Add Table     Add Table     Bulks     Competities     Conter     Competities     Conter     Competities     Conter     Competities     Conter     Competities     Commetities     Commetities

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

File	Home	Insert	Draw	De	esign	Layout	Re	ferenc	es:	Mai	lings	Review	View	Deve	eloper	Help	₽ Tell me wh
Visual Basic	Macros	Record Macr Pause Record Macro Secur	ding	Add-	Word Add-ins	COM Add-ins	Aa ✓	Aa		ŗ		Design Mode Properties Group *	XML Ma Pan		Block Authors	Restrict	Document Template
	Coi		ity.		Add-ins			- H		Contro		oloup	Mapp	ing	Pro		Templates



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

XML Mapping	
Custom XML Part:	
http://brevity.com.au/client	*
4 root	
▲ client	
accountid	
address1	
address2	
age	
autogenerateinvoice	
background	
branches	
branchid	
carenotes	
carenotesclient	
centerlinkdvanumber	
citizenship	
clientid	
clientprofiletemplateid	
combinedaddress	
condition	
conditionother	
countryofbirthid	
CreatedBy	
CreatedOn	

### 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.



firstname	lastname
-----------	----------

address1 address2 suburb state postcode

Dear

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.*.

Ta	X						
firstname							
<u>R</u> ich Text	Insert Content Control	•					
Plain <u>T</u> ext	Map to Selected Content Control						

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.* 

	✓ root		
	⊿ cl	ent	
<u>R</u> ep	peating	Insert Content Control	•

#### **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.



Download template			
Name	Modified	Action	♣ Upload Files or drop files here
FinalMerge.docx	30 Jul 2018	-	
template (1).docx	30 Jul 2018	-	

### **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.

Ð	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
	1931							
				sample 1903@brevitycaresoftware.com				
0	1904	Ander, Cory - 1904	14-08-0217	sample 1904@brevity caresoftware.com	0494106972	0292053692		Revesby
0	1916	Appeno , Hal - 1916	07-11-2017	sample 1916@brevity caresoftware.com	0493063409	0290640785		CABRAMATTA

• **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.

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							Shine 50
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M 1801							Diar 10 Seburb
H 1921	AC TANKS THESE A	01-08-2017	sanpin 1900gbroutycansodbrans.com	6473600EX	6290134709		Steine So Sedaurb Patronesod
H 101	Avi, Sary - 1963 A Aviac, Carp - 1964	8148-2017 1448-4217	sangin 1965ggaradycansofhans can sangin 1964ggaradycansofhans can	647300034 6464106372	6290134790 6292963662		Sher 10
M (1907) 1907 1909 1909 1909	All, Tany - 1963 A Ander, Cary - 1984 Appens, Jind - 1978	91-08-2017 14-08-0217 87-15-2017	sangin 1900ğilməlycansolham cən sangin 1961ğilməlycansolham cən sanşin 1914ğinəlycansolham cən	947980004 9464198977 9460803469	6290134798 6293265867 6293546795		Stear 50 Sedar5 Parawata Reweite CARTMANTDA
D 1907 9 1907 9 1907 9 1909 9 1909 9 1909 9 1909 9 1909	All, Terry - 1965 A Andre, Cery - 1964 Appene, Tel - 1978 Banks, Radin - 1966	81.08.2017 14.08.4017 07.11.2017 15.08.2017	sangin 1901 gijovalganoslikans can sangin 1904 gijovalganoslikans can sangin 1914 gijovalganoslikans can sangin 1914 gijovalganoslikans can	947980004 946498877 940080409 947983795	6294134798 6253953682 6296648795 6295664795		The St Schurts Partnessed Concentry Concentry, Sector (1),5

• **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.



Ð	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
	1931							
	1903	Aki, Terny - 1903	01-09-2017	sample 1903@brevitycaresoftware.com	0473690034	0290134709		Pairiewood
	1904	Ander, Cory - 1904	14-08-0217	sample1904@brevitycaresofturare.com	0494106972	0292053692		Revesby
	1916	Appeno , Hal - 1916	07-11-2017	sample 1916@brevitycaresoftware.com	0493063409	0290640785		CABRAMATTA
	1906	Banks, Robin - 1906	15-09-2017	sample1906@brevitycaresofturare.com	0470637916	0295099415		SMITHFIELD
0	1021	Barb3, Ackue - 1021	11-08-2017	sample1021@brevitycaresoftware.com	0469637791	0298774394		CANLEY HEIGHTS
	1003	Barracuda, Yolandad - 1003	17-04-2017	sample 1003@brevitycaresoftware.com	0487750791	0297616043		LANSVALE
0	1001	Black, Betty - 1001	24-07-2017	sample1001@brevitycaresofturare.com	0492781071	0298166223		ST JOHNS PARK
	1009	Bump, Donald - 1009	14-05-2017	sample1009@brevitycaresoftware.com	0495923600	0290586861		ASHCROFT
-0	1004	Burghof, Jenny - 1004	23-05-2017	sample1004@brevitycaresoftware.com	0467698853	0290651060		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.

letter_template.docx	31 Jul 2018	Mail Merge
		1 1
Tips		
Note: you can click on this icon the document.	on the upper right corner to change the	view of

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.
	Uverpool
	N5W 2170
iar Pete	
	Monty Carlo
	1 Wentmore Street Click or tap here to enter text.
	Fairfield
	NSW 2165
tar Monty	
	Sal Monella
	2 Wart Street Click or tap here to enter text.
	Allawah
	NSW 2218
var Sal	
	Sue Vaneer
	1 Honeysuckle Street Click or tap here to enter text.
	A Moorebank
	NSW 2170
tar 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.

C BREVIT		9 😸 ents Empkyees	👽 Care Management	<b>O</b> g Administration	Schedule Soard	New Service	<∕> System Setup			4	P (	anda, Jak
ead List	Active leads 🔿										w Home	Laad List
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,p												show 50 🔹
E 18	Name		First Name		LestName		Email Address			Phote		
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0 4	Doe, John		John		Doe							
0 7	Austin, Michael		Michael		Austin		micheel austin@gmail.	ann.		0455815235		
0 *	Abert. Steve		Stave		Albert		steveabert@priait.com			0451 224 62	5	
0 9	Nest, Nest		test		test		test					
0 10	Ookath, David		David		Oorem							
2 11	Lamaro, Jerem	cu	January		Lamaro		jerunylamaro@lest.com			(07) 3490 14	2441	

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.

C BREVITY .	Luclas Clients	Empkyees	Care Management	<b>Q</b> Administration	Bcheduk		New Service	4) System Set	Lip			¢	•	Smith, July
🔄 Lamaro, Jere	my											# Home	Load List	Details
🖸 Save 🕘 Close							ii.	Cor Proposal	Ø Deactivate	Communications	I Notes	Documents	B Delete	+ New
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Details														1
Lead details				Address						Client Funding Detail	h			
Exating Client? Or	0 xes # pas				Antress	45 Yang	ian Drive			Funding Source	e D N	33		
First Name	Jeremy				Suburt*	VILLEN	EUVE			Registration Numbe	8			
Last Name	Lamaro				51414	Dutets	ant.			Pricelo	P D N	045 18/18		
Date of Birth	E 50109/021	1980			Poutcoda*	8516				Follow up Reminder				
Email Address	premytenered	test.com												
Representative Name O										Follow up Gute C	<b>9</b> 田 10	er, 18/02/2019		_
	(07) 3400 1431									Approval Stag	at Quote	Acceptance		

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.

	ustes Clerts	Employees	💝 Care Management	OC Admenicization	Schedule Board	New Service	> System Se	thup			¢.	. •	Tirelly, John W
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Last Name	Lanaro				State Queensland				Proster* D NDIS 18:19				
Date of Birth	E Sat 09/02/19	60		i i	Postcode" 4514				Follow up Reminder				
Email Address	jeremytemaro@te	sit.com											
Representative Name 0									Follow up Date	0. 🗉 W	on, 16/02/2019		
Phone	(07) 3400 3435								Approval (Ray	97" Servic	e Agreoment Signe	đ	٠



# 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.

elect if you would like to include Communications, Notes or Documents during o	onversion
Communications	
☑ Notes	
Documents	

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

trial1.brevity.com.au says		
Are you sure you want to convert this le	ead to client?	
	ок	Cancel

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.



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## 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.

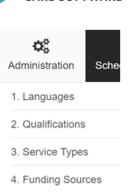
Brevity solves this by means of pricelists. Pricelists in Brevity allows you to setup multiple rates for a service type, and specify which pricelist to use for each service you deliver. In this guide we will look at how to manage pricelists in Brevity. Brevity will load updated NDIS pricelists as they 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*.





5. 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.



Save @ Close				00	Deactivate 🖷 C	communications Of	Notes B Do	ouments	B Delete + N	ierer
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etails			After Hou	r Setup						
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### **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.



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#### Linking the Pricelist to the Service Template

Edit Service Schedule Template Item record

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.

🖺 Save 🛛 Close		
On this form: Details Clier	ts	
etails		
Item Details		
Service Schedule Template*	ρ	Druff, Dan - 1930
Funding Source*	P	Druff, Dan - 1930 - NDIS - 430181818
Pricelist 0*	P	NDIS 18/19
Service Type*		
A/H Calcu CORE		istance to access community, social and rec activities - individual n
Invo		

#### 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.



New Service Schedule recor	d
🖺 Save 🛛 Close	
On this form: Service Schedule	e details Roster
Service Schedule details	
Service Schedule details	
Type*	Individual
Client	Druff, Dan - 1914
Client Funding	Druff, Dan - 1930 - NDIS - 430181818
Pricelist	D NDIS 18/19
Service Type*	9
PHG1/Y	RE - Assistance to access community, social and rec activities - individual f 1 Shown
Additional Roster Commer.	

## **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.

#### ↓ Mail Merge

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 template			
Name	Modified	Action	2. Upload Files or drop files here
FinalMerge.docx	30 Jul 2018	-	
template (1).docx	30 Jul 2018	-	

#### **Download Blank Template**

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

	Active Client Ltd.							Home / Client List
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								Show 50
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id 1931	Name	Entry Date	Enal	Mobile Phone	Home Phone	Work Phone	Suburb	Show 50
	Name Akt, Terty - 1903 Ander, Cary - 1904	Exery Date 01-00-2017 14-00-0217	Email sangar1032@Drwtbclarexoflware.com sangar1054@Drwtbclarexoflware.com	Mobile Phone 0473990034	Home Phone 0290134729	Work Phone	Saburb Parrentod	Show 50

#### 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:

<u>C</u> ustomize Quick Access Toolbar							
Show Quick Access Toolbar Below the Ribbon							
Customize the <u>R</u> ibbon							
Collapse the Ribbon							

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



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			(mprovider - ) -	1	noel

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

File	Home	Insert	Draw	De	esign	Layout	Re	ferenc	es	Mail	ings	Review	View	Dev	eloper	Help	$\mathcal P$ Tell me wh
~		Record Macr	ю		, <b>O</b>		Aa	Aa		f	M	Design Mode	8				
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	Co	de			Add-ins					Contro	ols		Mapp	ing	Pro	tect	Templates

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.

		firstname lastname
		address1 address2 suburb state postcode
Dear		

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.*.

	тах	
	firstname	
<u>R</u> ich Text	Insert Content Control	•
Plain <u>T</u> ext	Map to Selected Content Control	

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.* 

✓ root		
die	nt	
<u>R</u> epeating	Insert Content Control	•

#### **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.



Download template			
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template (1).docx	30 Jul 2018	-	

#### **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.

Ð	id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
	1931							
				sample 1903@brevitycaresoftware.com				
0	1904	Ander, Cory - 1904	14-08-0217	sample 1904@brevity caresoftware.com	0494106972	0292053692		Revesby
0	1916	Appeno , Hal - 1916	07-11-2017	sample 1916@brevity caresoftware.com	0493063409	0290640785		CABRAMATTA

• **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.

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1927 1923 1924	AK, Tariy - 1983 🗛	01-05-2017		94730000A	6290134709		Drive 10 Seburb Patrowood
1921 1923 1924 1945	All, Tarry - 1963 A Ander, Cary - 1964	8148-2017 1448-4217	sangin 1963gjaravljupansofikans can sangin 1964gjaravljupansofikans can	947380854 4464108572	6294134799 6262963662		Diver 50
107 100 100 100	Alt, Tarry - 1983 A Andre, Ciry - 1984 Appene, Jind - 1996 Barks, Rudon - 1986	01-00-2017 14-06-4217 07-11-2017	sangin 1900ğilməlycansofluarı cən sangin 1961ğilməlycansofluarı cən sanşin 1914ğilməlycansofluarı cən	947989004 946-08677 9403003409	6294154798 6292965682 6296645795		Statur 52 Satur5 Patrimood Remote CARDINADTES
10 1921 1983 1984 1986 1986 1986 1986	All, Tang - 1963 A Ander, Cing - 1964 Appene, Jind - 1976 Banks, Radon - 1966	81-08-2017 14-08-4017 82-11-2017 15-08-2017	sangin 190 gijosakgansolkaan can sangin 196 gijosakgansolkaan can sangin 191 gijosakgansolkaan can sangin 191 gijosakgansolkaan can	94079800004 94944098072 9403080489 94079807878	6294134798 6250953687 6299648795 625509415		Share 50 Roburts Partnessed Revenue CARCOMPUTAL Santtariation
	All, Tanga - 1983 A Alban, Cing - 1984 Agame, Jinal - 1976 Banto, Radon - 1986 Banto, Anton - 1986 Banto, Anton - 1987 B	8148-3017 1448-4217 82-11-2807 15-88-3917 16-88-3917	sungia Milliglianaly cancelhean con sunga Milliglianaly cancelhean con sunga Milliglianaly cancelhean con sunga Milliglianaly cancelhean con sunga Milliglianaly cancelhean con	947989004 946498477 94609348 9479637516 9469637516	6294134799 6252952962 62595462785 6259509415 6256274394		Elice ID futuriti Patronial Revenity Catalogue ID, Santonae ID, Santonae ID, Santonae ID, Santonae ID, Santonae ID, Santonae ID,

• **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.



	14	Marine	Encry Date	Una	HEADINE PERSONA	House Private	HOIK PINCIP	succeo
	1931							
				sample 1903@trevitycaresoftware.com				Pairiewood
	1904	Ander, Coty - 1904	14-00-0217	sample1904@brevitycaresoftware.com	0494106972	0292053692		Revesby
	1906	Banks, Robin - 1906	15-09-2017	sample1906@brevitycaresoftware.com	0470637916	0295099415		SMITHFIELD
0	1021	Barb3, Ackue - 1021	11-08-2017	sample1021@brevitycaresoftware.com	0469637791	0298774394		CANLEY HEIGHTS
		Barracuda, Yolandad - 1903		sample1003@brevitycaresoftware.com				
0	1001	Black, Betty - 1001	24-07-2017	sample1001@brevitycaresoftware.com	0492781071	0298166223		ST JOHNS PARK
		Bump, Donald - 1009		sample1009@trevitycaresoftware.com	0495923600	0290505061		ASHCROFT
0	1004	Durghof, Jenny - 1004	23-05-2017	sample1004@breuitycaresoftware.com	0407050353	0298051666		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.

letter_template.docx	31 Jul 2018	Mail Merge
Tips		
Note: you can click on this icon the document.	on the upper right c	orner to change the view of

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.
	Uverpool
	NSW 2170
Dear Pete	
Dear Pese	
	Monty Carlo
	1 Wentmore Street Click or tap here to enter text.
	Fairfield
	NSW 2165
Dear Monty	
year monty	
	Sal Monella
	2 Wart Street Click or tap here to enter text.
	Allawah
	N5W 2218
Dear Sal	
	Sue Vaneer
	1 Honeysuckle Street Click or tap here to enter text.
	Moorebank
	N5W 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.

## **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.

Client		
Step 1 - Upload CSV/E	Excel file	Download template file
Choose File No file chosen		Upload and continue

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

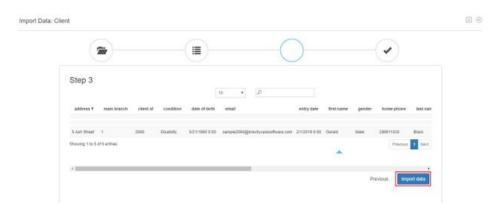


Data: Client			
Step 1 - Upload CS	/Excel file	Download template file	
Choose File client (1).csv		Upload and continue	

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.

	(	N.	$\bigcirc$
1		)	✓
Step 2			
C SV Fields	client Fields	Foreign Fields	
nama		•	
antry data			
amai			
moblephone		*	
tomeptone		•	
wonphone			
auburb			
primaryld			

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.

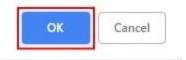


Click on the OK Button to confirm the importing of the data to Brevity



#### trial1.brevity.com.au says

are you sure you want to import the data?



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.

Plan Reviews	+
Name	
Aki, Terry Plan Review	ŵ
Showing 1 to 1 of 1 entries	Previous Next

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

New Client Goals record							]
🖹 Save 🐵 Close							
On this form: Client Goals	3						
Client Goals							-
Client Goals details		Status		R	tesponsible Parties		
Name		Status*	In Progress	] .	Client / Family Responsibilities		
Goal*	Ø	Date Achieved	(III)		Organisation Responsibilities Ø	đ	
Start Date 0*		Achievement Comments				4	
End Date ()*				d 01	ther Stakeholder Responsibilities 0		
Description ()*							
Goal Client*	D Aarons, Daniel - 1942						



**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	Туре	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 Muli	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.



Finding his way home 🖋	Client need to learn how to	go home				
liding the Correct Bus 🖋	Learn how to ride the correct Bus					
To destination a			Taking a bus and walking		Walking	
10 destination g				Take a Bus		

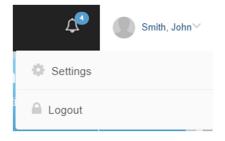
You can view the self serve portal guide for the complete instruction on how to create a goal from the self - serve portal. (see <u>Self-Serve Portal Guide</u>)

## **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.



Settings - UAT				
Organisation Information	Billing Integration			
Name:	John Smith	PostCode:	2170	
Address Line 1:	17b / 9 Lyn Pde Prestons NSW 2170	State:	NSW	
Address Line 2:	17b / 9 Lyn Pde	Suburb:	Prestons	
Email Address:	bilal@evello.com.au	SMS notifications:	Enabled	
Phone:		Preferred notify time:	10:00:00	
SMS Balance:	0	Credit Card setup:	Active	
				Update

### **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.

Settings -	UAT					
Organisation Inf	formation Dilling	Integration				
find Name	DLAL			Credit card number	4645750000001116	
and Yoame	MATADA	LLA		Credit card Type	Vea	
lined.	176/944	n Pde		Card Expiry Worth	11	
242	Prestors			Cand Expiry Year	2022	
foreix Code:	2170				Update	
turk.						
ountry.	Australia					
mat	blai@eve	lo com au				
hone						
oices:						
New (S)	• ettes				Search D	
Period	* Client Count	GST	Total	Tan M	Payment Date	Paid
Aug 2018	82	31.08	341.06	5512756226216451003054	2019-02-28-00:10:23	Paid
Dec 2018	00	33.36	366.87			Pay New
Jan 2019	00	33.35	366.87			Pay Now

#### 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.

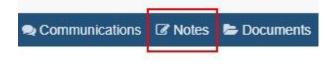


#### **Brevity Notes**

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.

Close			😻 Form	Olient Profile	A Manage Login	Ø Deactivate	Communications	C Notes	Documents 😂	🛍 Delete	+ New
On this form: Client Details	Contact Details	Centerlink / DVA / Healthcare	Related Contacts								
Notes										Add Note	

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.

	Client's Medication	
	Description	
	Clerif's Medication note	
tes		Add 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.

I	Client's Medication	C İ
	Client's Medication note	
	— Smith, John (14/05/2019 10:35:19 AM)	
10		

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

	Name	
	Client's Medication	
	Description	
	Client's Medication note Note for the Client Close Sinve	
Client's Medication	¢ B	Add Note
- Smith, John (14/05/2019 10:35:1	9 AM)	

#### **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.

	20034	
Service Required	Community Services	•
Service Location	Client Direct Service	
Last Service Date $\boldsymbol{\Theta}$		
End of Service Date $\boldsymbol{0}$	Tue,09/01/2018	
Exit Date O	(m)	
Risk Notification O	Sest	
Onboarding Notes		
General Notes		
Care Notes		
Care Notes (Client Provided)		

#### **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.

Save O Close		
On this form: Service Sch	edua detalis Rester	
rvice Schedule details		
Service Schedule details		
Type*	Individual	
	D CORE - Accestance with cell-care activities	
Adver		
Additional Roster Comments		
A/H Calculation/	Shift End	
Date*	Scheduled	
Shit Notes O		

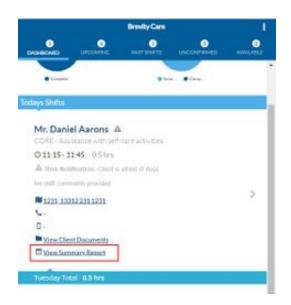
From the Brevity Mobile App, if the support worker click on the name of the client, it will show the risk notification of the client.



		Breakly Care		- 0
	UPCOMING	C) MAT SHIP TO	UNCONFIRMED	
-		61.0	far dia tanà mang	
6		1		
$(\bigcirc$			• O., )	
days Shifts				
Mr. Danie	el Aarons 🤞			
	intance with self	-care activities		
01115-1	1:45 -0.5 hrs			
A Plan text	fication: Client a	attaid of degs		
Northeast	unti posidot			
014555-055	122011201			>
Property of a standard standards				
C.				
C.				

#### **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.

Gender:	Male, 119
Speaks:	Greek
Address: Phone: Mobile:	1231, 13312, 1231, 231
	Mental
	View Documents
<b>Client Notes</b>	ctest 123
Care Notes:	test
Client Provided	test 456
Care 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.
- 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.

El Savel 🛛 Close		
On this form: Service Sch	redule details Auster	
ervice Schedule details		
Service Schedule details		
Trib4*	Individual	
Statistics Type*	D CORE - Accestance with cell-care activities	
Advity		
Additional Router Comments		
A/H Calculation*	Stvit End	
Statue*	Scheduled	
Shift Notes O		

#### 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.



- 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.
- 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.

	Employee	236 - value no longer exisits	
	Start Time*	0 7:00	
	End Time*	@ 8.00	
	Total Hours	1.00	
Activity			
10000			
	Activity O		
	Activity <b>0</b> Additional Roster Comments		
			,
Days		Weekly	

#### 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

Mr. Daniel Aarons 🔺	
Pickup at their house	
@ 07:15 - 08:15 - 1 hrs	



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

Mr. Daniel Aarons 🔺	
Pickup at their house Activit	y Note
@ 07:15 - 08:15 - 1 hrs	
A Risk Notification: Client is afraid of	if dogs
The client doesn't want to eat noodles	Additional Rooster
M 47 Wigley Street, DOVER GARDEN	S South Australia 5048
View Client Documents	

#### **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.

type to filter 🖉 🖺	Mon 13/5	Tue 14/5	Wed 15/5	
Aarons, Daniel - 1942 5.68 hrs \$ ##	10:00 - 10:11 - 0.18 hrs CORE - Assistance with self-care activities Adella, Mort	11:15 - 11:45 - 0.50 hrs CORE - Assistance with self-care activities Adella, Mort	10:45 - 11:45 - 1.00 hrs CORE - Assistance with self-care activities Adella, Mort	
	14:30 - 15:30 - 1.00 hrs CORE - Assistance with self-care activities Inabottile, Genie	14:30 - 15:30 - 1.00 hrs CORE - Assistance with self-care activities Inabottle, Genie	14:30 - 15:30 - 1.00 hrs CORE - Assistance with self-care activities Inabottle, Genie	

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.



Charge Travel to Client 0	Select	*
Travel Distance		
Travel Distance Rate		
Total Travel Km		
Travel Hours		
Travel Time Rate		
Total Travel Time		
Shift Notes		
Shift Notes O	The client achieved their goal	
		7

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.

٠	Adella, Mort 2.18 hrs	10:00 - 10:11 - 0,18 hrs CORE - Assistance with self-care activities Aarons, Daniel - 1942	11:15 - 11:45 - 0.50 hrs hrs CORE - Assistance with self-care activities Aarons, Daniel - 1942 COS +	10:45 - 11:45 - 1.00 hrs hrs CORE - Assistance with self-care activities Aarons, Daniel - 1942 
		11:15 - 11:45 - 0.50 hrs hrs CORE - Assistance with self-care activities Ackue, Barb - 1021 		

#### 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.



	 Schedule Board	New Service	<∕> System Setup
Clients			
Oroups			
Service Providers			
Service Schedule			
Service Schedule Template			
Service Calendar			
Bulk Email Notifications			
Client Funding			
Client Shifts			
Invoice Batches			
Funding Claims			
Invoices			
Reports			

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

BREVITY	Quetes	Clents	Employees	😍 Plan Manapement	<b>og</b> Administration	E Schedule Board	B New Sendor	4) Synteen Serkup
þ	[	Elem 0	ale .	To Culle		Select Chert		Select Employee
Id	Nate				* Description			
50	Client - Apr					Ape report	on Clients	
52	Clieft Age					Client Ape	report	
39	Client Funding Statement				Client Funding Usage Report			
45	Clarit Goals				Report on client goal history			
49	Client Goals (with images)				Report on client goal history with images			
13	Client Notes - Current Client			Client Notes for period				
30	Client Serv	ce Scheduk				Clent Service Schedule		
43	Client Sans	ce tichena	e - Replica			Client Service Schedule		
44	Dummy_Re	eport Name				Loren (pour) is simply dummy text		
45	Ounny_Re	iport Name	- Replica				Loren ipsu	an is simply during last
40	Involce						Invoice	
35	NDIS Balar	ices.					ND/S Bala	noes

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.



BREVITY	Queles	Clients	<b>#</b> Employees	😍 Plan Management	<b>OÇ</b> Administration	Checkele Board	New Sensice	4) System Satup
p		01/04/2	919	31/05/2019		alit Terry - 190		Select Employee
10	Name					Alki; Tamj - 1903		Son
50	Client - Age					T of SB4 Shown		on Clents
52	Citerri Age						Client Age	report
30	Client Funding Statement			Client Funding Usage Report				
45	Client Goals			Report on client goal history				
40	Client Goals (with images)				Report on client goal history with images			
13	Cilent Notes - Current Client				Client Notes for period			
30	Client Service Schedule				Client Service Schedule			
43	Clerit Servi	ce Schedul	e - Replica			Chert Service Schedule		
44	Dummy_Re	port Name				Loren ipsum is simply durriny fail		
45	Ournny_Re	port Name	- Replica			Lorem ipsum is simply dummy text		
40	Invoice						Invoice	
35	NDIS Balan	ces					NDIS Eate	nces

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

56	Client Profile	Client Profile
13	Client Notes - Current Client	Client Notes for period
64	Client Note	Client Note
46	Client Goals	Report on client goal history
39	Client Funding Statement	Client Funding Usage Report

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

ND OR				🕇 Add rule 📀 Add gr
serviceschedule.starttime	- between	• 01/01/2019	, 31/05/2019	X Dele

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**

Client Service Schedule BREVITY CARE SOFTWARE						
	and the second se	27 12 1mm		2016au		
	1292 - Doug based eductor if a settle - tota	statute preservation	6.45 34.4			
	Next in unline, in the car's	mant many many	ing .			
	1099 additional amounts and for bola facebra. If prevail	1000 P 1000 2000	line .			
	1040 - Strap hand activities in a starter starte	HON NOW NOW	4070 Sea			
	1092 - Drug based activities it a service - same	SAID OF STREET SAID OF	1.01 K-RD Groveni			
	1096 - Sing land adults is a series - see	INCO STON INCO.	18 800 Adds			
	1000 - Arring Saved articles it a permit or the	1212-12 12:074 14:074	1.00 Note Canadad			
	1090 - Driat land address in a server over	ADD DOW NOT	18 Hitchholm			
	1090 - Simpland articles is a policy our	DOG TON HOM	UK 2000 Autoba			
	COPE - Drive based activities in a territor - core	DED BEEN MERCH	LIE 1920 Autom			
	(296) - tring land attriate in a terms - say	PROF BRANCH	110 KHO ANNIN			
	1000 - Arrup hand any last it to perform them	PRA BAR KAN	140 Hall Aware			
	1090 - Once hand address it a party care	D-0.0 2/0.0 2/0.0	LN: XXX Aviate			
	2282 - additional accession and failing in a small	10-D-0 10.00 10.00-00	line .			
	1092 - additional amaneuro anto far testas Readings. 18 annuar	1940-19 1910-04 1130-04	544			
	1096 - Brog-Land attivities it a percen-stree	2010 1004 1204	LAS NOM Aware			
	1006 - Arrig family articles, it is proved on a	wild make aller	and Month Services			
	2090 - Oway hand address it a party care	863 36H 186	LID SCHLANING			
	1282 - Drow hand universe in a server race	DOD DOM DOM	s.m. 2020 Aware			
	1098 - Drug based attivities it a tartite-core	110-0 12 Nov 12 Nov	s.M. 2524 Serviced			
	1226 - 5 mg band anticize is a prote-took	\$10.00 \$10.00 \$1.00.00	10 Kell Strekel			
	1096 - Arma familiaristica in a serie core	BER BER GEN	Kill Inc			
	1090 - Direct family activities in a service - care	PER NEW DEM	18: 4:40 Shidai			
	2080 - Sima listed with the 31.4 Denter - Bate 5.3 - Terrelett	MINTER BLACK STATING	3ma			
	1995 - Bring based adverse it a service - lock	participation of the second	10. ANT Avera	-		
	Tana .		30.00 805-000			