

Setting up your first client

This step-by-step guide will help you get started managing your first NDIS client within Brevity. This guide assumes that you have already [entered your employee information](#) into the system.

This guide will cover the following:

1. Setting up the client goals that will be reported on as part of the service delivery reporting
2. Setting up the client funding to reflect your service agreement with the client
3. Setting up a service template to manage ongoing services based on client care plan
4. Managing the roster from week-to-week
5. Managing service delivery and reporting
6. Generating NDIS bulk claims

Before starting it is important to understand the data recording requirements for each of the Support Categories under NDIS. Brevity will help you meet all of these data recording and reporting requirements. It simplifies and reduces the administrative burden so you can concentrate on what is important - providing the best level of care to your clients.

For all **core supports** (excluding complex supports), these are episodic (recurring weekly or fortnightly) and will be adequately evidenced through the service agreement and roster or timesheet log. It will be important to record within the service agreement the duration, ratios (staff to client) and cost of each service. For every service delivered under core supports you will need to document, as appropriate, staff to participant ratios, support worker timesheets, group rosters, and case notes detailing activities and skill building.

For **capacity building** (and complex core supports), you will also need to also adequately evidence service within the service agreement as noted above. These types of supports (as well as assistance with social and community participation) will typically require both a log or roster and a case note as evidence of quantity and type. Where the delivery of these supports results in the delivery of a report or assessment to the participant, additional documentation may not be required if the participant name and NDIS number, date(s), times and quantity of the support type are documented within the final report/assessment.

For **capital support** (as well as consumables), these should be invoiced to the participant. Invoices with the participant's name, NDIS number and the date of delivery may not require additional evidence of quantity or support type. You should generate these from within your accounting system.

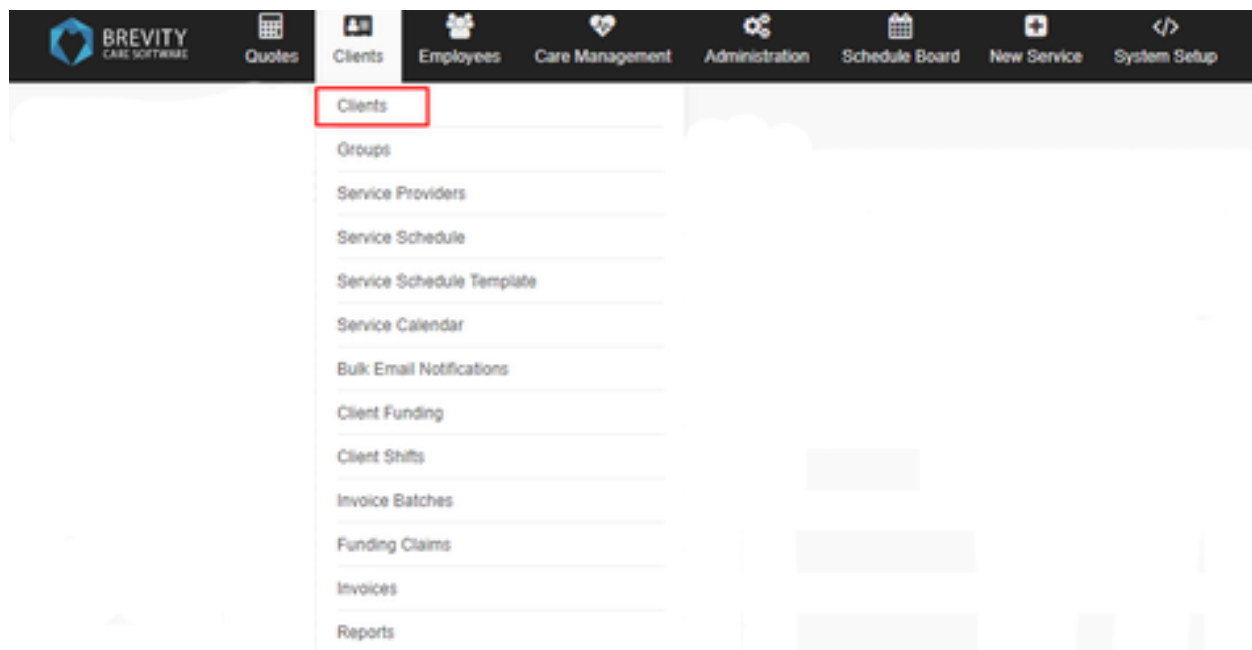
For **coordination of supports** delivered to a participant in conjunction with any other support delivery the provider must retain documentation of the following:

- organisational arrangements in place to keep information separate between teams
- a participant's options for their coordination of supports
- documentation that there is no remuneration provided to staff for participant volume

Please Note: you will need to renegotiate the service agreement if there are any pricing or service delivery changes required while you have an active service agreement with a client.

Step 1: Creating a client

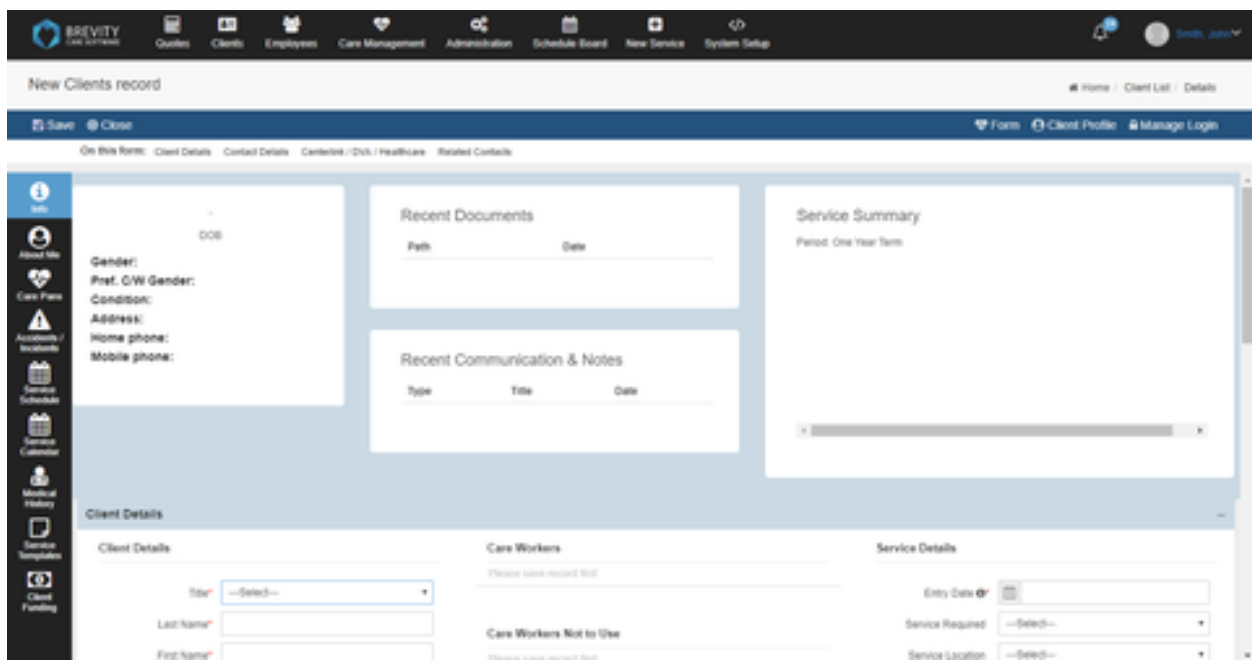
Hover to the Clients Menu, select the Clients tab.



Click the New button to create a new Client



Fill in the necessary details, once done hit Save.



Step 2: Setting up the Client Funding

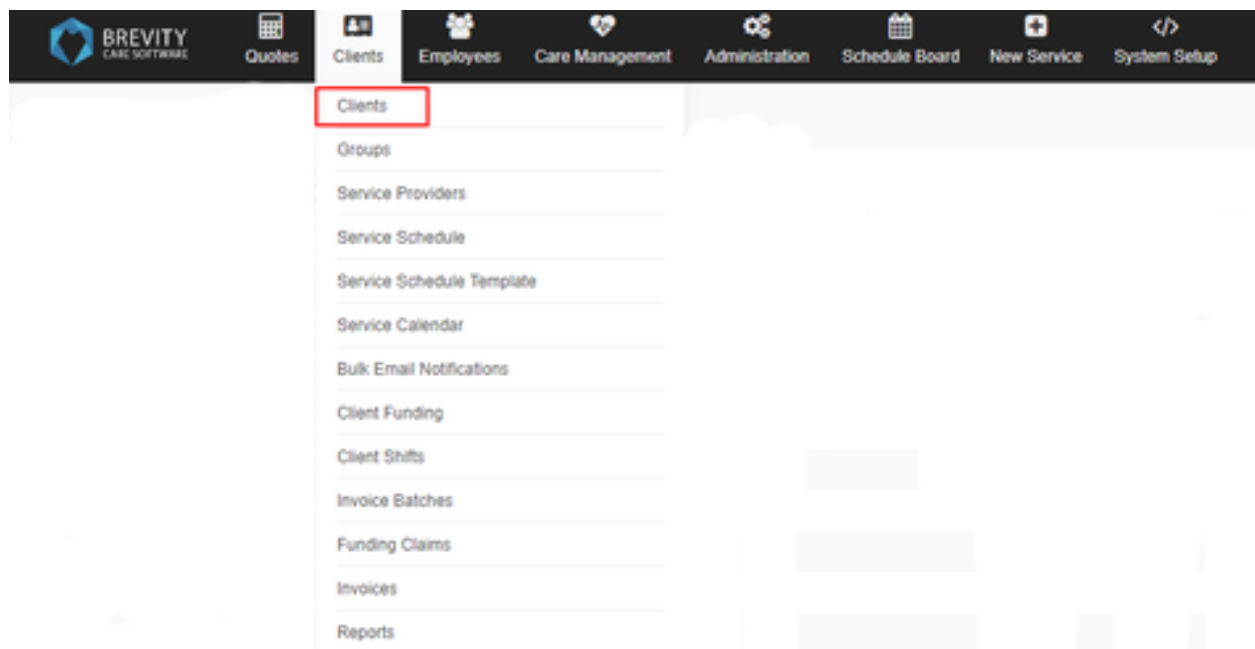
The client funding record will reflect the details of the service agreement you have signed with the client and is a required step when setting up NDIS clients within the system. It will include the client NDIS number for bulk claiming, dates between which the services will be delivered, all the services that the client is funded for, and the budget for each service.

Every service that you deliver will be drawn down from the client funding. The system will ensure that services are only delivered between the funded period and will also ensure that you do not exceed the available budget.

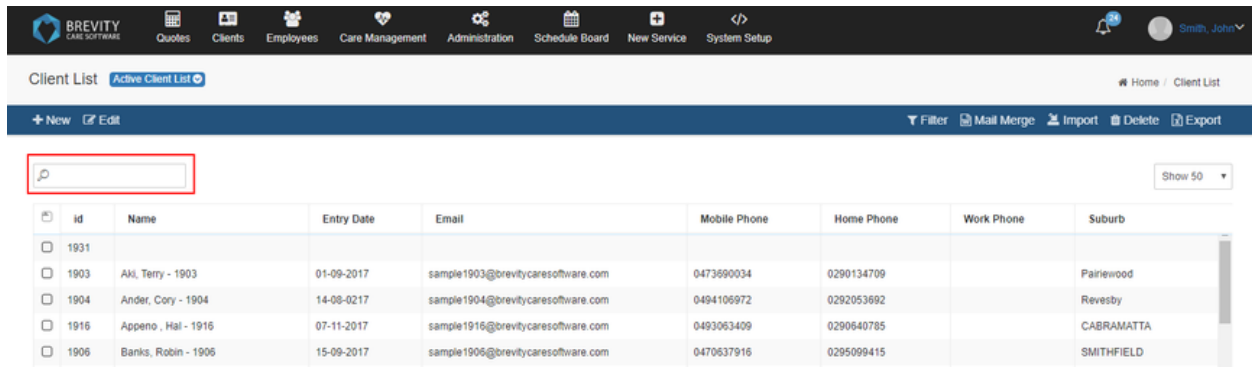
In this step, we will look at setting up a new client funding record for the client.

Open Client Record

If not already open, open the client record that you want to manage the funding for by hovering over the Clients Menu, select the Clients sub-menu item.



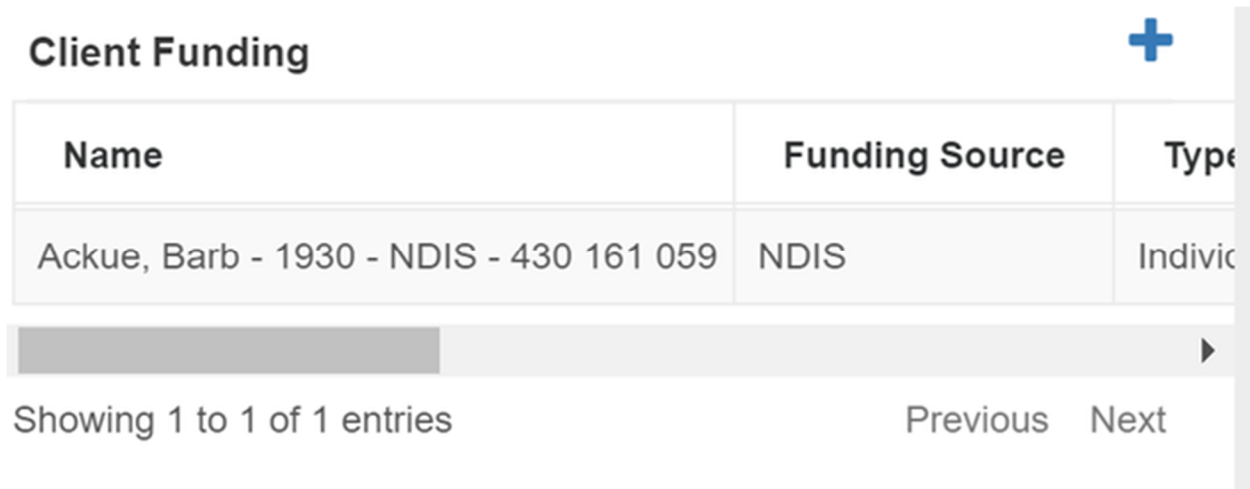
You will be redirected to the Clients list window, search for the name of the client under the Search Field box. You can click on the edit button or double click on the client's name to open the record.



id	Name	Entry Date	Email	Mobile Phone	Home Phone	Work Phone	Suburb
1931							
1903	Akl, Terry - 1903	01-09-2017	sample1903@brevitycaresoftware.com	0473690034	0290134709		Pairiewood
1904	Ander, Cory - 1904	14-08-0217	sample1904@brevitycaresoftware.com	0494106972	0292053692		Revesby
1916	Appeno, Hal - 1916	07-11-2017	sample1916@brevitycaresoftware.com	0493063409	0290640785		CABRAMATTA
1906	Banks, Robin - 1906	15-09-2017	sample1906@brevitycaresoftware.com	0470637916	0295099415		SMITHFIELD

Adding the Client Funding

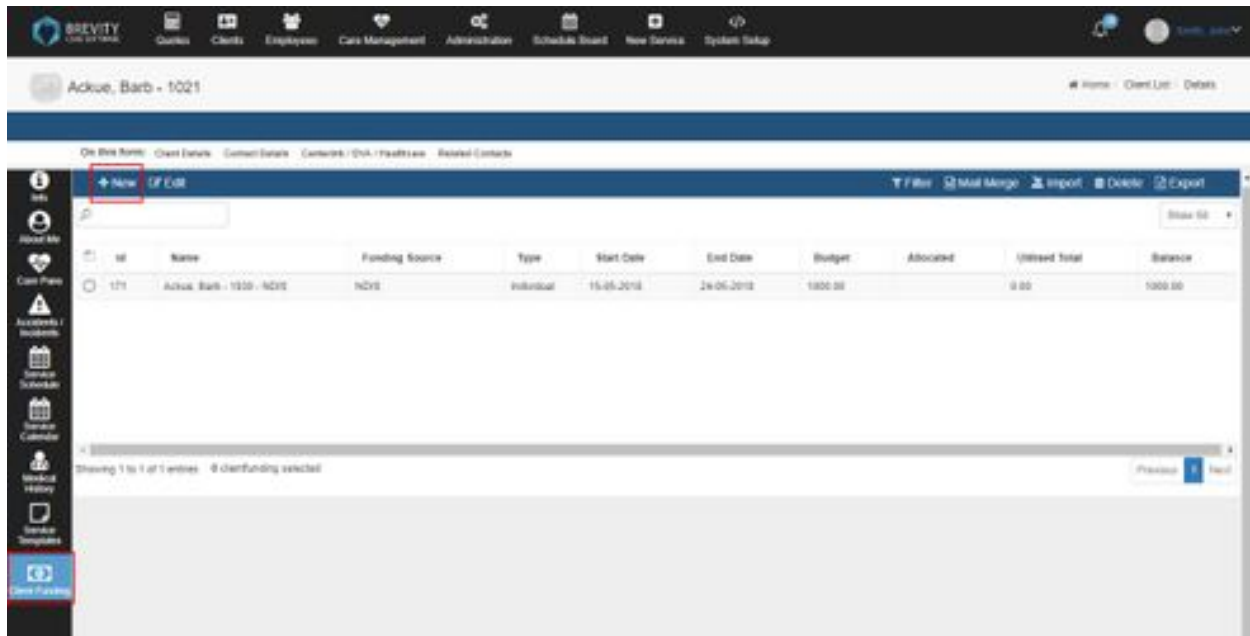
On the lower right part of the Client profile screen, there is a Client Funding section. Select the blue Plus Icon above the list to add a new client funding record. You should create only one client funding record per service agreement, with all services from the service agreement added to it.



Name	Funding Source	Type
Ackue, Barb - 1930 - NDIS - 430 161 059	NDIS	Individ

Showing 1 to 1 of 1 entries Previous Next

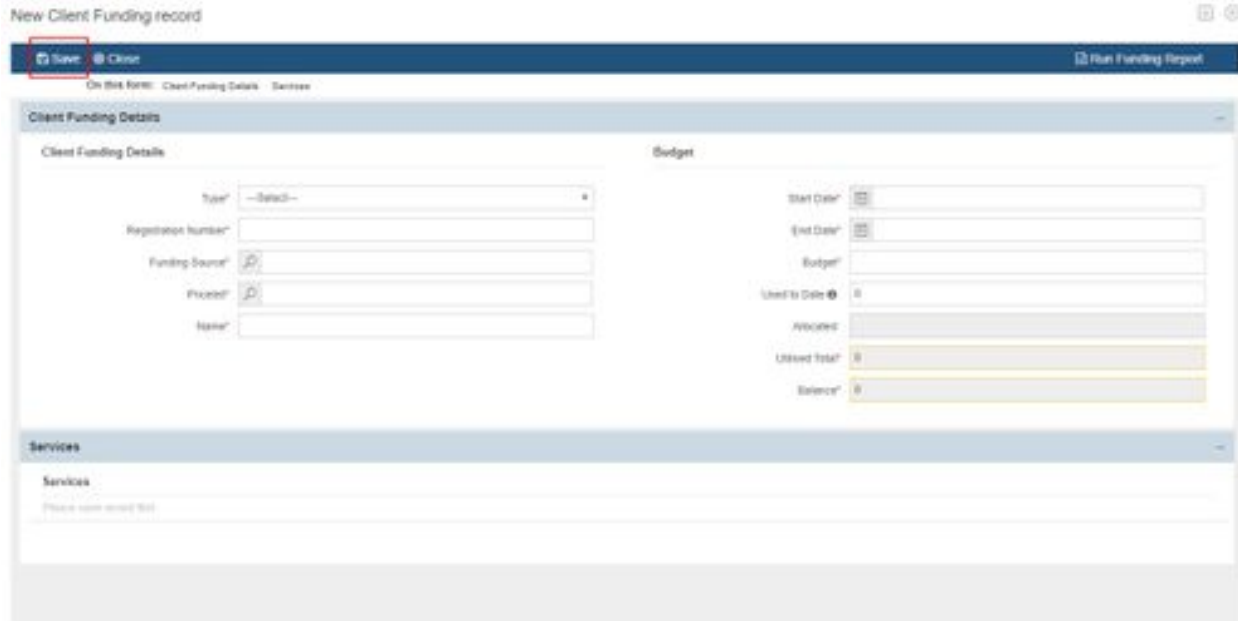
You can also create a client funding by using the Client's Quick Menu. Click on the Client Funding tab from the quick menu and then Click on the +New Button



A *Client Funding* screen will pop-up. Fill out all the information as follows:

1. **Type:** Select Individual
2. **Client:** Will auto-populate with the client name and doesn't need to be changed
3. **Registration Number:** Enter the clients NDIS number here
4. **Funding Source:** Select NDIS
5. **Pricelist:** Select the price list that will determine the charge rates for services delivered to the client, as per the service agreement
6. **Start Date:** Start date of the service agreement
7. **End Date:** End date of the service agreement
8. **Budget:** Total budget of all services

Click Save to create the record.



Please note: You must publish the client funding before you are able to use it for rostering. You can unpublish at any time if you need to make changes, which will unpublish related services on the roster as well. This ensures the rostered services still fall within the parameters of changes you have made (date or budget changes).

Adding Service for the Client Funding (Important)

After Saving the Client Funding information, the Services section at the bottom of the screen will now be available, that allows you to add all the services that the client is funded for - these will be used for tracking the budget as well as determining the correct NDIS support numbers to use when generating claims from Brevity.

When adding the service types, you should select the weekday service code and if after hour rates are allowed. The system has built-in rules to look up the correct NDIS Support Item Numbers when generating the claims for services rostered for after hours (i.e. Weekday A/h, Saturday, Sunday and Public Holiday).

Under the Services Section, select the "Plus Icon" to open in the Services Information window. This can be repeated multiple times to add as many services as you need.

Services						
Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	
No data available in table						
Showing 0 to 0 of 0 entries						

Fill-out the information as follows:

1. **Service Type:** select the name of the funded service from the service agreement. If you not sure you can click the search icon and search using the *NDIS Support Number*. Brevity automatically manages to claim for after-hours codes - you just need to select the normal hour *Support Item*, and specify if after hours are allowed using the options on the right. For services that NDIS does not pay after hour rates for, the option will be disabled by default. You can enable these if you wish - [click here](#) for instructions on how to do this.
2. **Budget:** enter the budget for this service from the service agreement

Click *Save* to add the service. Click *Close* to return to the Client Funding screen to see this service now added to the list. You can click the plus again to add additional services. You can also double-click an item in the list to modify it.

New Client Funding Code record

Save Close

On this form: Details

Client Funding Code details	Allowed Rates
Client Funding* <input type="text" value="Bump, Donald - NDIS - 11/18 to 03/19"/>	After Hours <input type="radio"/> Yes <input checked="" type="radio"/> No
Service Type* <input type="text" value="CORE - Assistance with personal domestic activities"/>	Saturday <input type="radio"/> Yes <input checked="" type="radio"/> No
Budget (optional) <input type="text" value="6000"/>	Sunday <input type="radio"/> Yes <input checked="" type="radio"/> No
Used to Date* <input type="text" value="0"/>	Public Holiday <input type="radio"/> Yes <input checked="" type="radio"/> No
Allocated <input type="text" value=""/>	
Utilised Total <input type="text" value="0"/>	
Balance <input type="text" value="6000.00"/>	

You can close the Client Funding pop-up window when done adding all the funded services, to return to the Client profile screen.

Publishing the Fund

Before you can use the fund of the client, you need to publish the fund. After creating the client funding detail and creating service for the client fund, click on the publish button so it will be available for rostering.

New Client Funding record

Save Close Run Funding Report **Publish** Edit Name Create Copy Deactivate Notes Delete New

On This Form: Client Funding Details Services

Publish this Client Funding record before creating service schedule

Client Funding Details

Client Funding Details: Type: Individual, Client: Emun, Max - 1925, Registration Number: 545648123274, Funding Source: NDIS, Priced: NDIS 18/19

Budget: Start Date: Sun, 09/12/2018, End Date: Thu, 28/02/2019, Budget: 5000.00, Used to Date: 0.00, Allocated: , Utilised Total: 0.00, Balance: 5000.00

Services

Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance
Emun, Max - NDIS - 12/18 to 02/19 - CORE - Assistance with personal domestic activities	CORE - Assistance with personal domestic activities			0.00	0.00

Showing 1 to 1 of 1 entries

A confirmation window will pop up. Click Ok to confirm publishing the fund.

Editing the Client's Fund

If you need to change the details for the client's fund, you should click on the unpublish button first before you can start editing the fund. You cannot edit the client's fund if you don't unpublish the fund.

New Client Funding record

Close Run Funding Report Edit Name **Unpublish** Edit Name Create Copy Notes New

On This Form: Client Funding Details Services

Client Funding Details

Client Funding Details: Type: Individual, Client: Emun, Max - 1925, Registration Number: 545648123274, Funding Source: NDIS, Priced: NDIS 18/19

Budget: Start Date: Sun, 09/12/2018, End Date: Thu, 28/02/2019, Budget: 5000.00, Used to Date: 0.00, Allocated: , Utilised Total: 0.00, Balance: 5000.00

Services

Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance
Emun, Max - NDIS - 12/18 to 02/19 - CORE - Assistance with personal domestic activities	CORE - Assistance with personal domestic activities			0.00	0.00

Showing 1 to 1 of 1 entries

A confirmation window will pop up. Click ok to confirm.

You need to save the changes that have been done with the client's fund. Click the save button to save the changes.

New Client Funding record

Save **Close** Run Funding Report Publish Edit Name Create Copy Deactivate Notes Delete + New

On this form: Client Funding Details Services

● Publish this Client Funding record before creating service schedule

Client Funding Details

Type*	Individual	Start Date*	Sun, 09/12/2018
Client	Emum, Max - 1925	End Date*	Thu, 29/02/2019
Registration Number*	545648123274	Budget*	5000.00
Funding Source*	NDIS	Used to Date	0.00
Practitioner*	NDIS 18/19	Allocated	
		Utilised Total*	0.00
		Balance*	5000.00

Services

Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	
Emum, Max - NDIS - 12/18 to 02/19 - CORE - Assistance with personal domestic activities	CORE - Assistance with personal domestic activities			0.00	0.00	

Showing 1 to 1 of 1 entries

Previous Next

Click publish so it would be available again for rostering

New Client Funding record

Save **Close** Run Funding Report **Publish** Edit Name Create Copy Deactivate Notes Delete + New

On this form: Client Funding Details Services

● Publish this Client Funding record before creating service schedule

Client Funding Details

Type*	Individual	Start Date*	Sun, 09/12/2018
Client	Emum, Max - 1925	End Date*	Thu, 29/02/2019
Registration Number*	545648123274	Budget*	5000.00
Funding Source*	NDIS	Used to Date	0.00
Practitioner*	NDIS 18/19	Allocated	
		Utilised Total*	0.00
		Balance*	5000.00

Services

Name	Service Type	Budget (optional)	Allocated	Utilised Total	Balance	
Emum, Max - NDIS - 12/18 to 02/19 - CORE - Assistance with personal domestic activities	CORE - Assistance with personal domestic activities			0.00	0.00	

Showing 1 to 1 of 1 entries


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Step 3: Adding a Service Template

As you know, NDIS is goal orientated with the aim of skill building. This makes devising a plan with regular service delivery, to work towards the client goals, an important step. This is also a requirement for delivering core support services. To simplify this task, Brevity allows you to create Service Templates for generating the repeating (or episodic) services - this can be daily, weekly or fortnightly. This step is optional.

Creating the Template

From within the client record, below the Client Funding list, you'll see the Service Templates list. Select the "Plus Icon" to create a new Service Template for the client.



Service Templates	
Bump, Donald - 1009	Brevity Care

Showing 1 to 1 of 1 entries Previous Next

The Service Template form will show in a pop-up screen. By default, all required information will be auto-populated for you. All you need to do is click the Save button to create the record.

New Service Schedule Template record 🗨️ 🔄

Save Close

On this form: Details Items

Details ⌵

Information

Type* Individual ▼

Client Dan, Joe - 1960

After saving the record, the Items tab will now be available. This section allows you to add the services to be rostered for the client with the recurring period. If a service will be delivered on different times of the day for different days of the week, you will need to create two separate records here for this anomaly. Click the blue plus above the list to add a new item. This can be repeated to add as many items as needed.

Items -

+

Name	Service Type	Employee	Recurring Type	Start Time	End Time	Total Hours	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
No data available in table													

Showing 0 to 0 of 0 entries Previous Next

Fill-out all the necessary information being asked in the Items information page and then select the "Save Button" to save changes. Then select the "Close Button" located next to the "Save Button" to go back to the Service Template window.

The employee field is optional and can be filled in if you want to roster a particular employee for this service. Important fields are the Service Type, Funding Source (needs to link to the client NDIS funding), the Start/End time of the Shifts, the Recurring Type, and the days of the week the service will be delivered. If the service is not available for after hours based on the client funding, the Saturday and Sunday options will be disabled.

New Service Schedule Template Item record

On this form: Details Clients

Details

Information	Roster
Service Schedule Template* <input type="text" value="Bump, Donald - 1009"/>	Employee <input type="text"/>
Funding Source* <input type="text"/>	Start Time* <input type="text" value="11:40"/>
Practitioner* <input type="text"/>	End Time* <input type="text" value="11:40"/>
Service Type* <input type="text"/>	Total Hours <input type="text"/>
A/N Calculator* <input type="text" value="--Select--"/>	Admin Hours* <input type="text" value="0"/>
Invoice for* <input type="text" value="Client"/>	Shift Comments
Billable* <input checked="" type="radio"/> Yes <input type="radio"/> No	Activity* <input type="text"/>
Travel	Additional Roster Comments <input type="text"/>
Pay Travel Mileage <input checked="" type="radio"/> Yes <input type="radio"/> No	Days
Pay Travel Time <input checked="" type="radio"/> Yes <input type="radio"/> No	Recurring Type* <input type="text" value="--Select--"/>
Address Start* <input type="text"/>	Monday <input checked="" type="radio"/> Yes <input type="radio"/> No
Address End* <input type="text"/>	Tuesday <input checked="" type="radio"/> Yes <input type="radio"/> No
Charge Travel to Client* <input type="text" value="No"/>	

Copying the Service Template to the Roster

After you have completed adding the Template Items, you can use these to generate the client roster. It is advisable to copy the items till the end of the client's service agreement to create placeholder services. Services can always be adjusted in the roster, or deleted and recreated if things change. Having the services in the roster will give you visibility on workload for upcoming weeks and months.

To copy the template to the roster, click the "Create Service Schedule Button" on the toolbar. This will open a pop-up screen.

New Service Schedule Template record

Save Close Update Service Schedule **Create Service Schedule** Deactivate Communications Notes Documents Delete + New

On this form: Details Items

Details

Information

Type: Individual

Client: Bump, Donald - 1009

Items

Name	Service Type	Employee	Recurring Type	Start Time	End Time	Total Hours	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	CORE - Assistance with personal domestic activities		Weekly	11:45 AM	13:45 PM	2.00	Yes	Yes	Yes	Yes	Yes	No

Showing 1 to 1 of 1 entries

On the pop-up screen, select the start and end date between which to generate the services for, as well as the items you want to include in the copy. Click the *Create* button to run the copy and to create the client's service schedule. Select the "Close Button" in the bottom right corner of the window to close.

Create Service Schedule from Template

Please select a start date and an end date to run the template for.

End Of Service Date :

From Date To Date

Select Template Items

Showing 1 to 1 of 1 entries

Service Type	Employee	Type	Start Time	End Time	Hours	Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input checked="" type="checkbox"/> CORE - Assistance to access community, social and rec activities - individual	Green, Park	Daily	15:00 PM	17:00 PM	2.00	Yes	Yes	Yes	Yes	Yes	Yes	Yes

The roster for the client has now been created. You can view this by clicking the *Schedule Board* link on the menu.

Step 4: Managing the Roster

The best way to manage the roster is via the Brevity Schedule Board, which displays all services for your organization in a calendar view - by week, by fortnight, or by month. It also has built-in quick actions that allow you to easily manage day-to-day service delivery, and perform bulk scheduling changes. The client quick links also allow you to quickly and easily manage clients for a convenient central location.

The Schedule Board has several views and filter options available, to allow to quickly and easily find the information you need within the board. This guide explores how to use.

Services generated via Service Templates show here. To add a once off service to the calendar, use the *New Service* button on the system menu

Fixing Pending Services (Yellow Entries) on Schedule Board

Brevity sets a service to Pending (as shown in yellow in the schedule board) if there is an issue while scheduling a service (employee unavailability, insufficient budget, scheduled outside funding period, etc..). It is possible sometimes for service to incorrectly show as pending or continue to show as pending after you have rectified issues with the shift. To fix this, select the services on the board (shown with a red border), and click the blue calculator icon in the bottom left to rerun the shift through the scheduling engine, and rectify the scheduling issue.



Filtering on the board

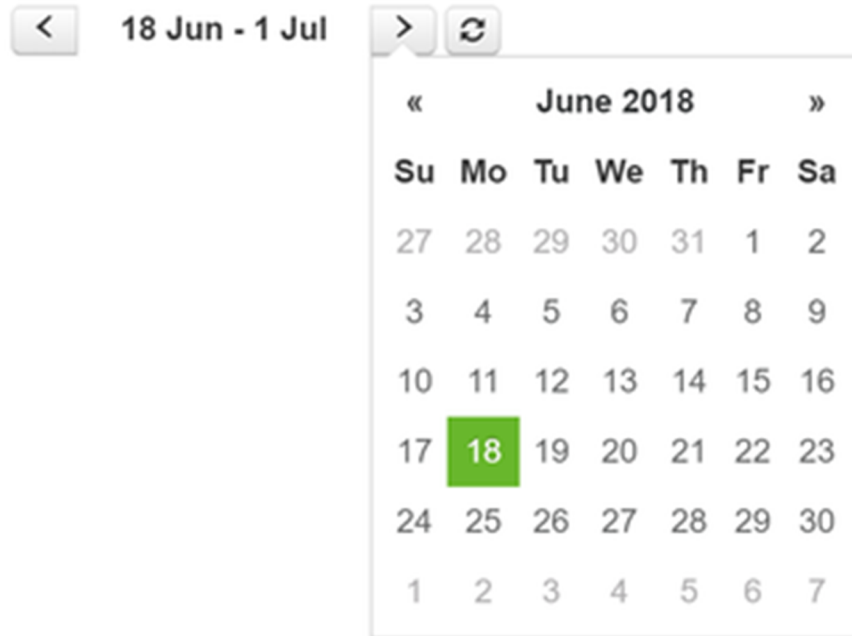
The filter on the far right allow you to toggle the view to show either client/employees that have service, or all client/employees:



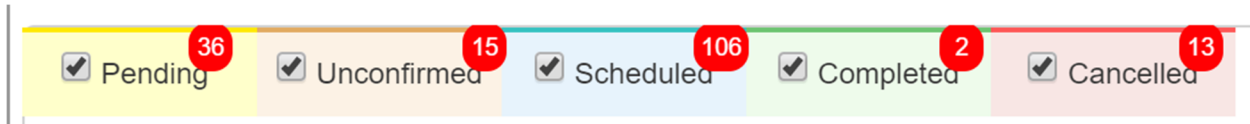
The period filter allows you to view the calendar by week, fortnight or month:



The date range filter allows you to easily navigate back and forth between weeks/months. You are 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 your fortnightly roster starts on a Tuesday, you can select the Tuesday you fortnight starts on and this will get set for your default (until it is changed).



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:



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 scheduled based on the services within calendar view (weekly, fortnightly or monthly)
3. The first icon on the left allows you to quickly access the client's 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



Dan, Joe - 1958

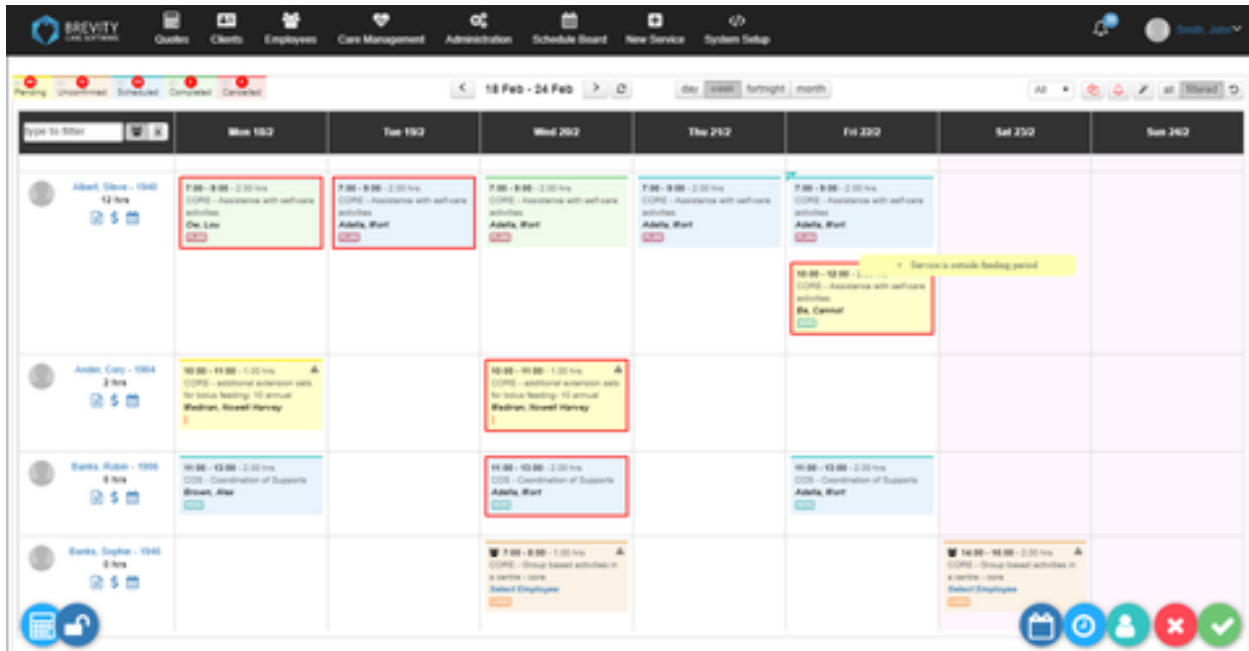
28 hrs



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 the completed service (undo the completion). This is available to administrators only.
3. The time icon in the bottom right allows changing 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 green tick icon allows you to complete scheduled shifts



Step 5: Completing Shifts & Shift Reports

Brevity will only generate claims for completed shifts. There are several ways to complete shifts within Brevity depending on your needs - these all involve confirming that the correct service has been delivered with the correct hours, by verifying against the support worker timesheets. The first two are managed using manual timesheets, while the third is submitted directly by the support worker via the associated Brevity mobile and web apps (recommended).

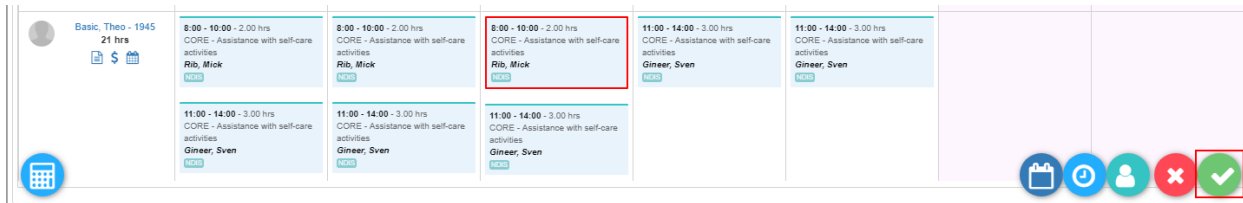
It is also recommended to process timesheets twice weekly, or at a minimum weekly. This allows you to address issues in a timely manner as well as generate claims on a more regular basis.

Confirming via the Schedule Board (manual timesheets)

To confirm manually submitted timesheets via the schedule board, switch the display to employee view, to view the services by the employee. This also ensure that you have selected the correct period within the date range.

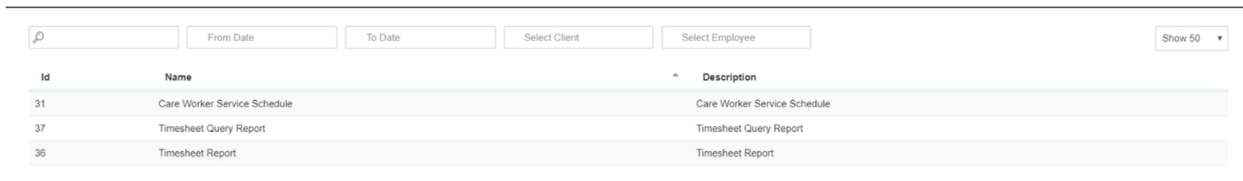
To confirm a shift has been completed based on hours schedule (and to auto-generate the timesheet), select the Scheduled Shifts (blue entries), and then click

the **Complete Shift** button in the bottom right. If you need to adjust the hours of the shift, you can double-click and amend as required before completing. You are able to confirm more than one shift at a time by selecting more than one at a time.



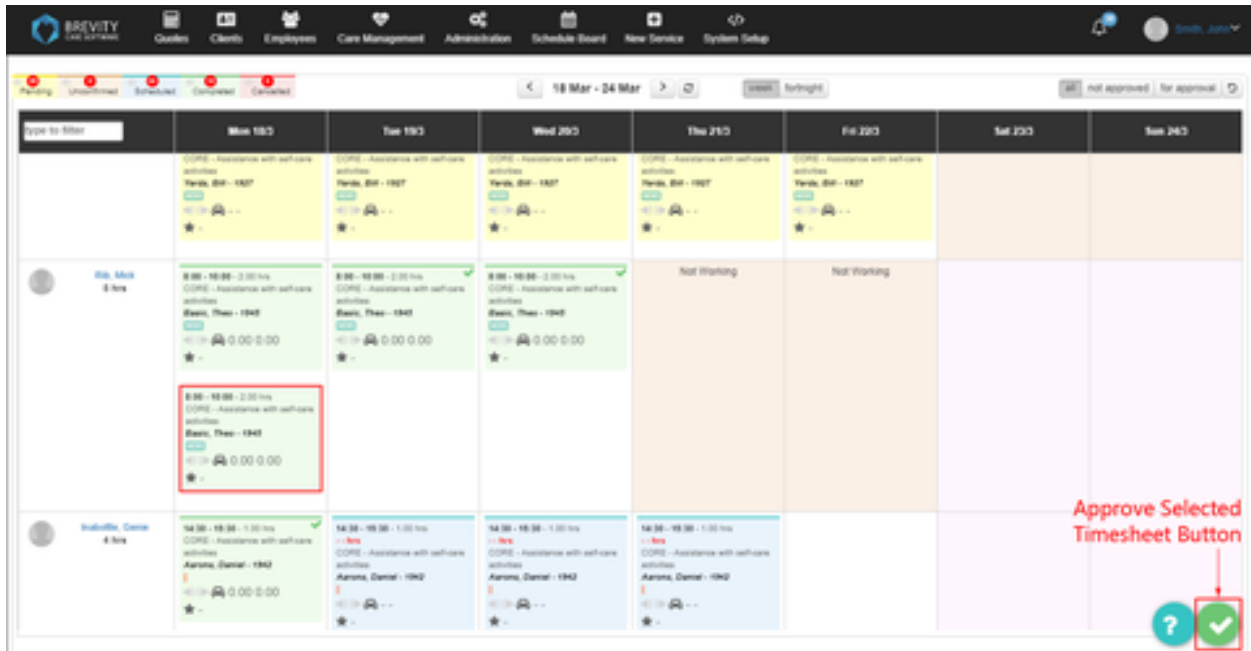
Confirming via the Approve Timesheet Screen (manual timesheets)

The second option for verifying the times provided by the support workers is the same as what was scheduled is using the approve timesheet function. You can optionally export a list of services for a support worker from the system to compare against the submitted timesheets by going to Employees > Reports, entering the date range, and then double-clicking the Timesheet report and selecting next on the filter screen – this can be exported to PDF and printed/filed.

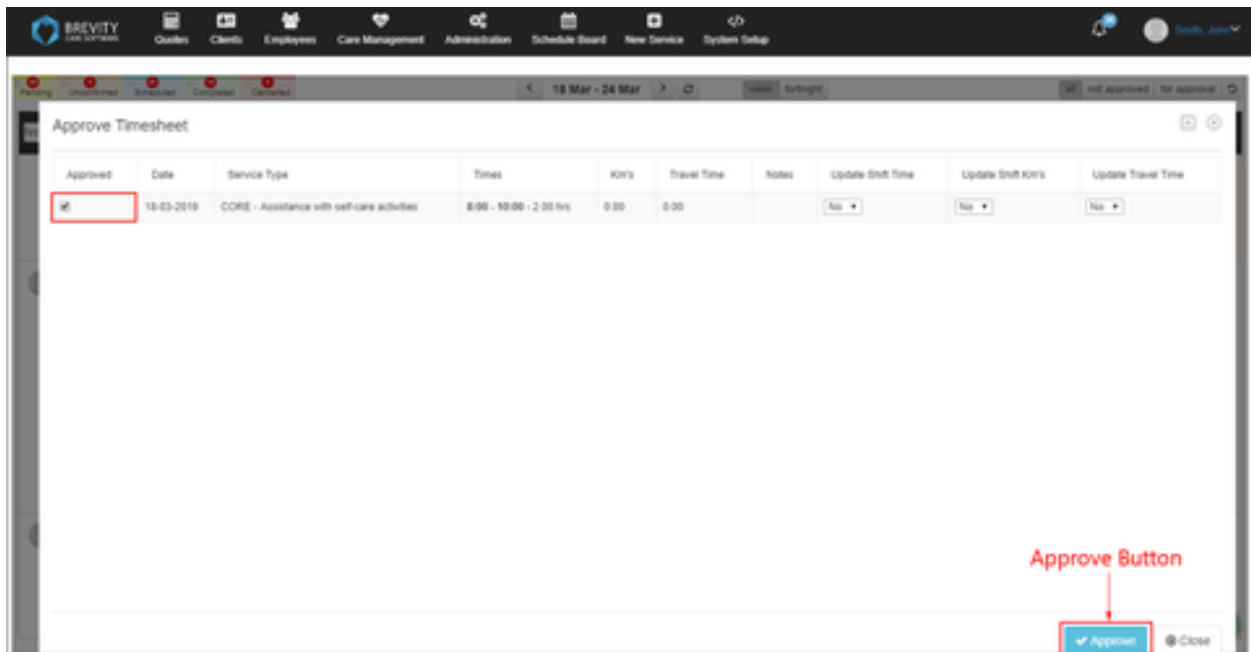


To approve timesheets using the approve timesheets function, navigate to *Employee > Approve Timesheets*.

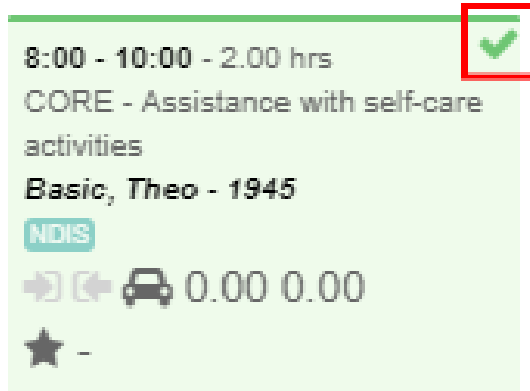
When the employees finished a shift using the Brevity Mobile App, you need to approve the timesheet of the employee to complete the shift. You cannot create an invoice for the completed shift of the client if the employee's timesheet is not approved. You can approve the timesheet of the employee by clicking on the shift of the employee you want to approve and then clicking on the Approve Selected Timesheet button.



A new window will appear after clicking on the Approved Selected Timesheet button. It will display all the timesheet of the employees that you can approve. You can also update the shift time, shift Km's and travel time from this page. Click on the checkbox from the approved column and then click on the Approve button to approve the timesheet of the employee.



Once the Timesheet has been approved, you will see a check mark on the upper right side of the shift. This indicates that the shift has been approved.

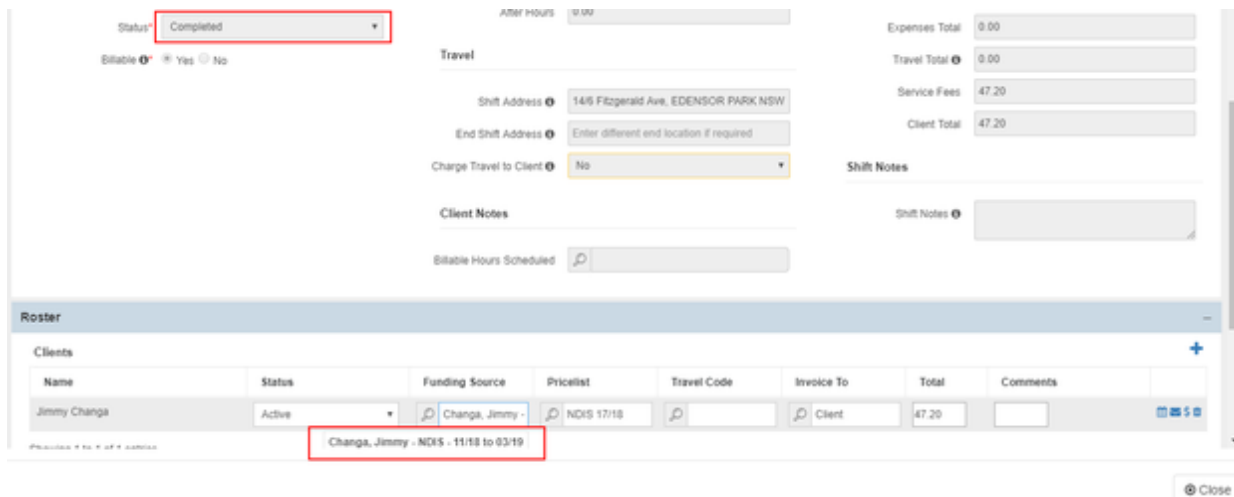


Submitting Timesheets via the Support Worker apps

This is the recommended way of receiving timesheets within Brevity as it saves you administration time verifying manually submitted timesheets against the roster, as well as allows the support workers to directly submit the service reports. The support worker apps are available for both web and mobile and allows the support workers to view their client profiles, their roster, and complete timesheets and care notes for the service.

Step 6: Generate Claim File

When generating claims or invoices, Brevity will only include completed shifts and shifts where the funding source on the Service is the same as that selected when generating the claim.



The screenshot shows a 'Completed' shift form with the following details:

- Status: Completed
- After Hours: 0.00
- Expenses Total: 0.00
- Travel Total: 0.00
- Service Fees: 47.20
- Client Total: 47.20
- Shift Address: 14/5 Fitzgerald Ave, EDENSOR PARK NSW
- Charge Travel to Client: No
- Client Notes: (empty)
- Bitable Hours Scheduled: (empty)

Below the form is a 'Roster' section with a table of clients:

Name	Status	Funding Source	Pricelist	Travel Code	Invoice To	Total	Comments
Jimmy Chang	Active	Chang, Jimmy	NDIS 17/18		Client	47.20	

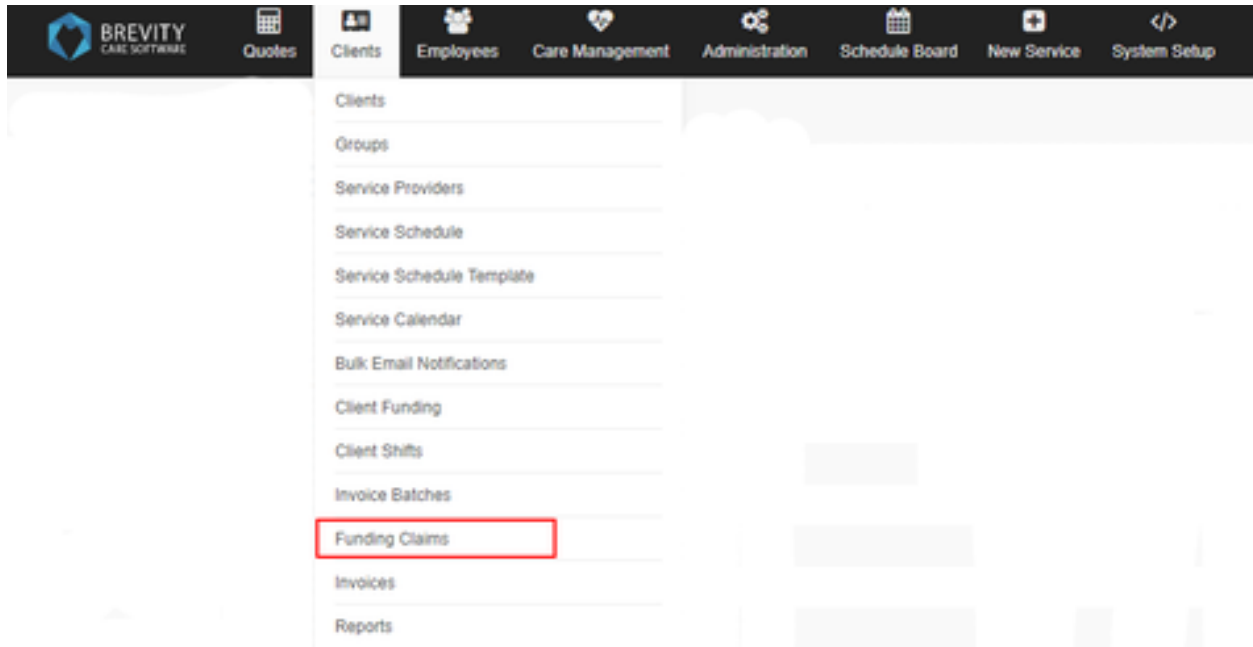
A red box highlights the 'Chang, Jimmy - NDIS - 11/18 to 03/19' entry in the table.

The following sections describe how you would generate claims for completed shifts. The process for generating invoices for *CASH* services is the same as outlined below except this is done via *Clients > Invoice Batches*.

Navigating to the Funding Claim Section

There are two ways to generate a claim. Plan Managed and Cash service schedule uses Invoice Batches to Generate the claim. NDIS service schedule uses Funding claims in generating the claim. In this example, we will generate the claim for NDIS service schedule. You can reach the funding claim by:

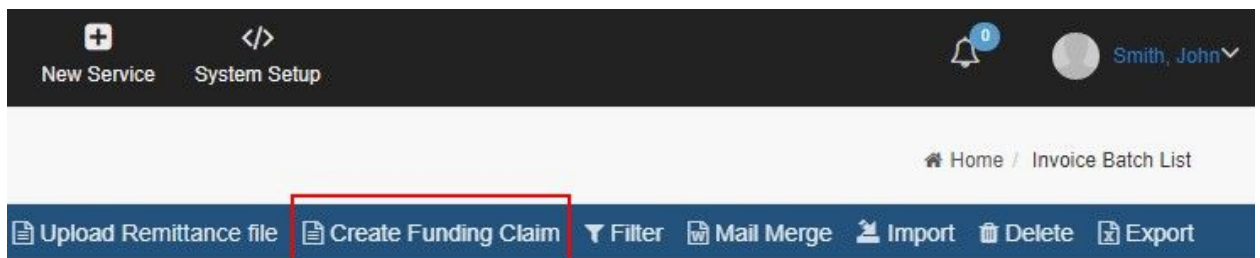
Navigate to Clients > Funding Claims



Generating a New Claim

Follow the steps in generating a claim for the NDIS service schedule:

1. Click the Create Funding Claim button to begin generating a new funding Claim

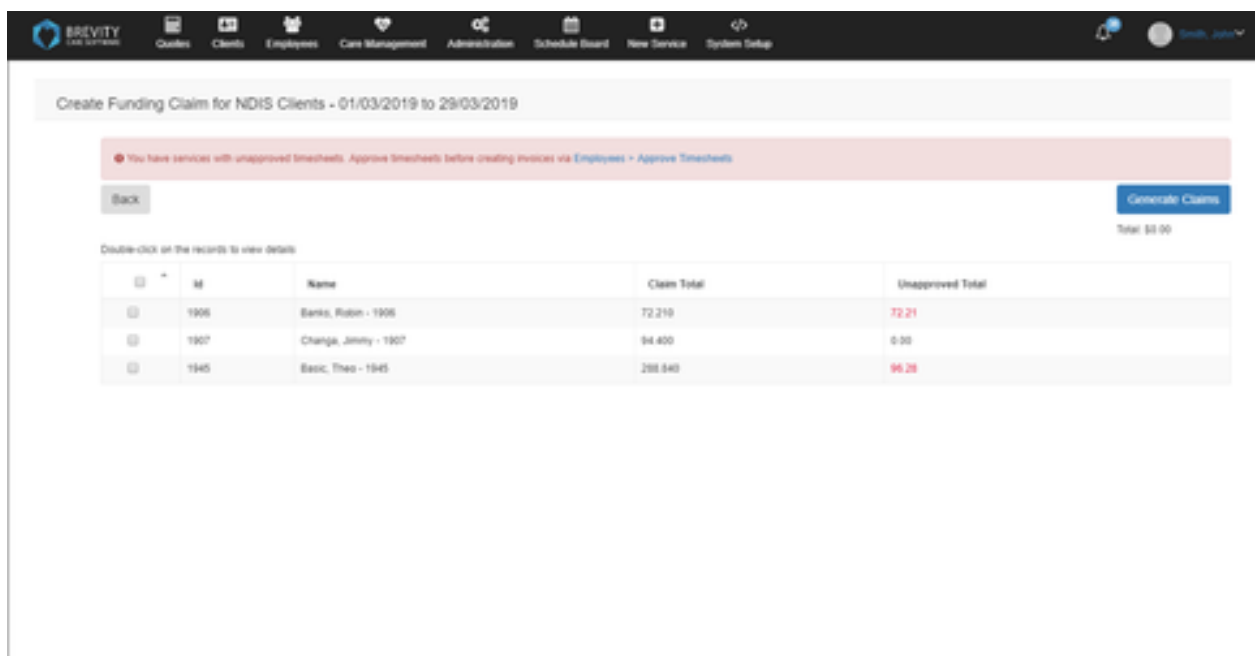


2. Select NDIS as the Funding Source, and enter the From/To dates that you want to generate claims for

Create Funding Claim

Funding Source From Date To Date [Next](#)

- The next page will show you the available funding claims. If there are shifts that need to be approved from the approved timesheets of the employee, it will show you an error that some of the shifts need to be approved. You can also see the claim total and unapproved total for the client.



Create Funding Claim for NDIS Clients - 01/03/2019 to 29/03/2019

You have services with unapproved timesheets. Approve timesheets before creating invoices via Employees > Approve Timesheets

[Back](#) [Generate Claims](#) Total \$0.00

Double-click on the records to view details

ID	Name	Claim Total	Unapproved Total
1906	Banks, Robin - 1906	72,210	72,210
1907	Chang, Jimmy - 1907	\$4,400	0.00
1945	Basic, Theo - 1945	288,840	96,280

You can double click on the invoice from the table to show the details of the invoice. The red text from the invoice detail indicates that the shift is unapproved from the employee's timesheet. The black text indicates that the shift has been approved from the employee's timesheet.

Claims for Basic, Theo - 1945

Showing 1 to 4 of 4 entries

ID	Name	Service	Date	Claim Code	Hours	Subtotal	TaxAmount	Total
196008	Basic, Theo - 1945	CORE - Assistance with self-care activities	19/03/2019 12:00:00 AM	01_011_0107_1_1	2.00	96.20	0.000	96.200
196008	Basic, Theo - 1945	CORE - Assistance with self-care activities	19/03/2019 12:00:00 AM	01_011_0107_1_1	2.00	96.20	0.000	96.200
196009	Basic, Theo - 1945	CORE - Assistance with self-care activities	19/03/2019 12:00:00 AM	01_011_0107_1_1	2.00	96.20	0.000	96.200
196009	Basic, Theo - 1945	CORE - Assistance with self-care activities	20/03/2019 12:00:00 AM	01_011_0107_1_1	2.00	96.20	0.000	96.200

Client Total: **\$288.840**

- If all the shifts has been approved from the employee's approved timesheet, you can click on the invoice that you want to generate and then click on the generate claim button to start generating the claim.

Create Funding Claim for NDIS Clients - 25/03/2019 to 29/03/2019

Back Generate Claims

Total: \$577.68

Double-click on the records to view details

<input type="checkbox"/>	ID	Name	Claim Total	Unapproved Total
<input checked="" type="checkbox"/>	1955	Falzone, Julie - 1955	577.680	0.00

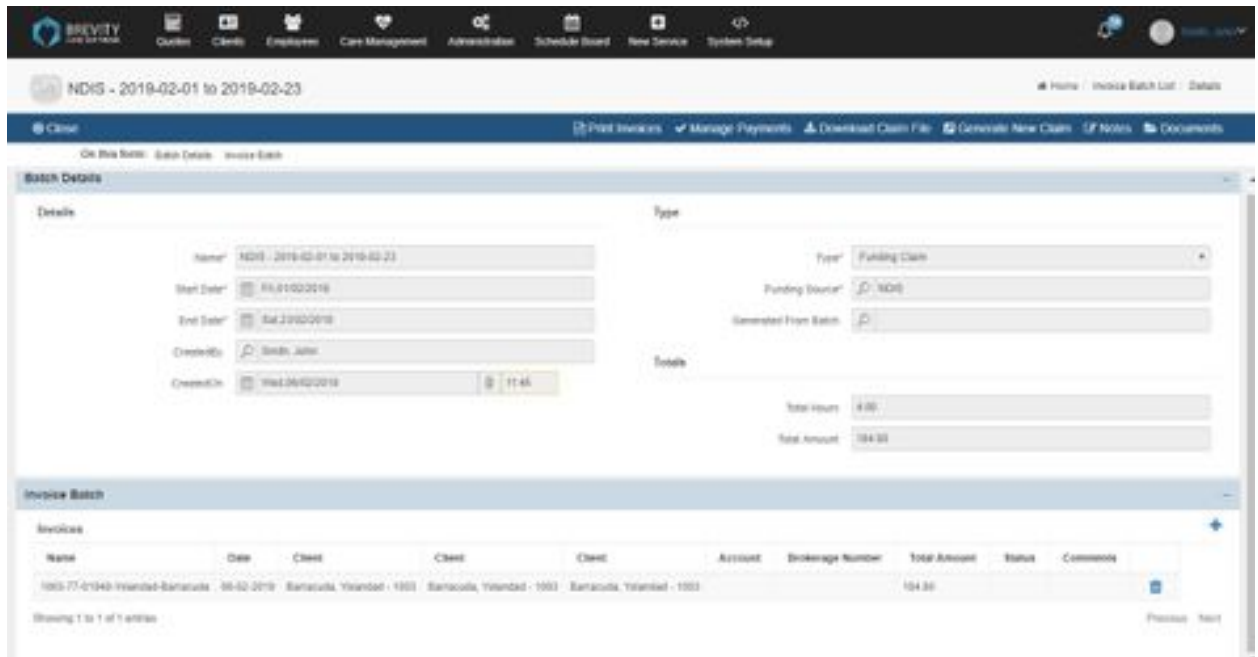
- A confirmation pop up will appear on the top portion of this window. Click on OK to confirm the generating of the Funding Claim.

trial1.brevity.com.au says

Are you sure you want to create funding claims for 1 selected clients?



- After Generating the funding claim, you will be redirected to the funding claim record of the client.



Exporting the Bulk Claim File and Submitting the Claims

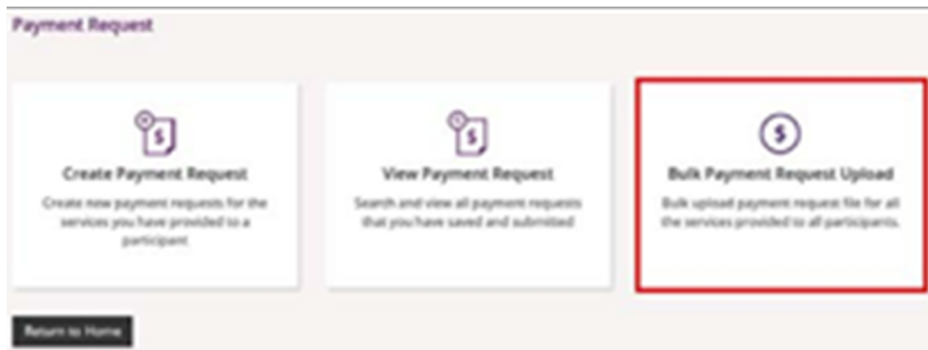
1. To download the Bulk Claim File to submit to NDIS, click the *Download Claim File* button on the toolbar on the batch screen.



This will download a claim file grouped by Client & Service Type, in the format required by NDIS. It will be a good idea to verify the totals within this file to ensure they match what you were expecting. Please don't edit the document in Excel or it will break the file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Registratic	NDISNum	SupportsD	SupportsD	SupportNu	ClaimRefe	Quantity	Hours	UnitPrice	GSTCode	Authorisec	Participant	InKind	Funding	Program
2	4.05E+09	1235465	#####	#####	01_004_0:	1931-42-4-Joe-Dan		2:00	42.43	P2					
3															

2. You can upload this file within the NDIS portal by going to the Payment Request section and then select the Bulk Payment Request Upload tile.



and uploading the file that was downloaded here



You can via full instruction for submitting bulk claims, provided by NDIS, via the following link:

https://providertoolkit.ndis.gov.au/sites/g/files/net3066/f/bulk_payment_requests_step_by_step_guide_v2.0.pdf

Printing Invoices

You are able to print all invoices for a batch by clicking the Print Invoices button on the toolbar on the batch screen. You can also print an individual invoice by double-clicking on the invoice within the invoice list at the bottom of the batch screen, and then clicking the *Print Invoice* button on the toolbar.



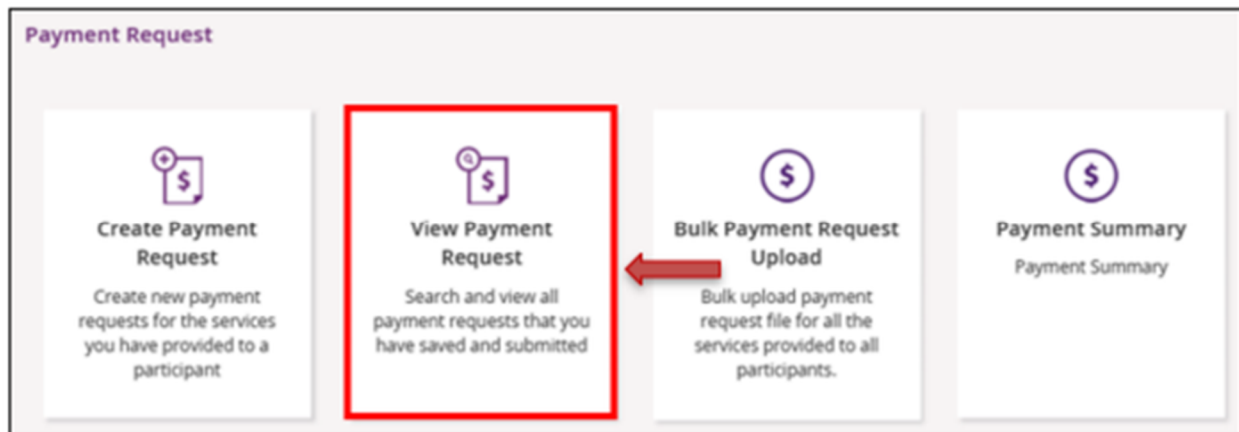
Step 7: Processing Payment Remittance

Brevity has built in functions to allow you to record which payments have been settled or rejected by NDIS, by uploading the remittance file downloaded from the NDIS portal. Brevity also allows you to fix issues for rejected claims and generate a new claim file for these. We will explore these functions in this guide.

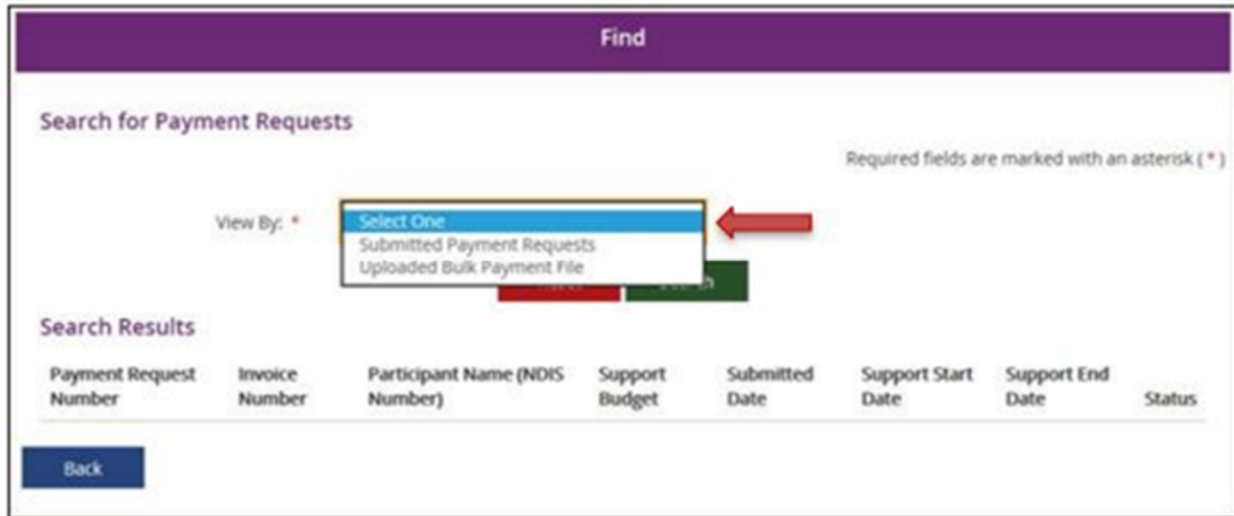
Downloading the Remittance File

NDIS will make available a remittance file after a payment request has been processed. This will contain a list of all paid and rejected claims. Rejected claims will have rejection reason, that you will use to rectify and resubmit the claim.

To download the remittance file, select the *View Payment Request* option in the NDIS portal:

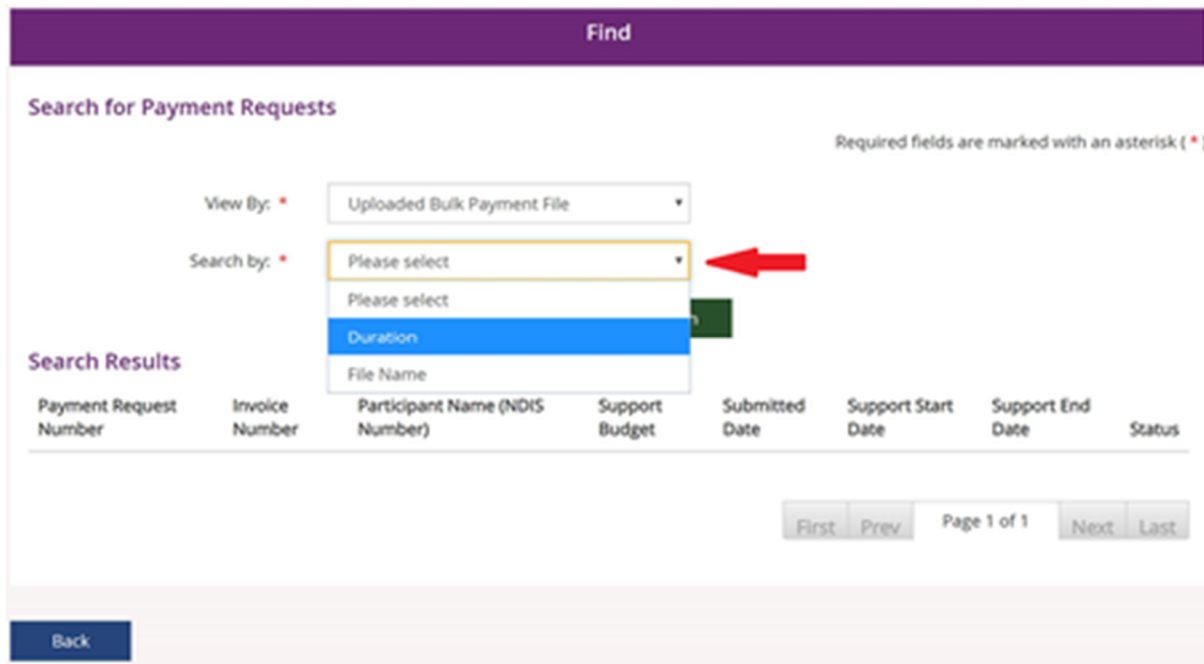


Then select the *Uploaded Bulk Payment File* option:



The screenshot shows the 'Find' search interface. At the top, there is a purple header with the word 'Find'. Below it, the title 'Search for Payment Requests' is displayed. A note on the right states 'Required fields are marked with an asterisk (*)'. The 'View By:' field is a dropdown menu with 'Select One' as the current selection. A red arrow points to this dropdown, and a green arrow points to the 'Uploaded Bulk Payment File' option in the list. Below the dropdown, there is a table with the following columns: Payment Request Number, Invoice Number, Participant Name (NDIS Number), Support Budget, Submitted Date, Support Start Date, Support End Date, and Status. A 'Back' button is located at the bottom left.

Then select *Duration* and complete the date range filter, which will be the date when the bulk claim file was uploaded:



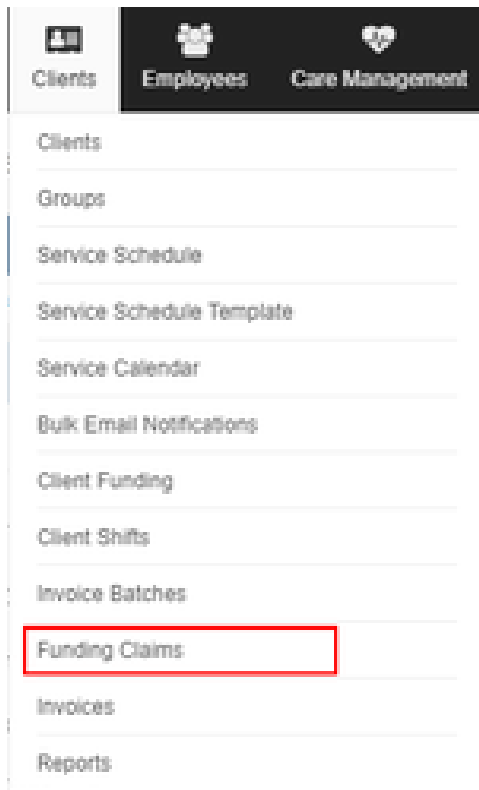
The screenshot shows the 'Find' search interface. At the top, there is a purple header with the word 'Find'. Below it, the title 'Search for Payment Requests' is displayed. A note on the right states 'Required fields are marked with an asterisk (*)'. The 'View By:' field is a dropdown menu with 'Uploaded Bulk Payment File' as the current selection. The 'Search by:' field is a dropdown menu with 'Please select' as the current selection. A red arrow points to this dropdown, and a green arrow points to the 'Duration' option in the list. Below the dropdown, there is a table with the following columns: Payment Request Number, Invoice Number, Participant Name (NDIS Number), Support Budget, Submitted Date, Support Start Date, Support End Date, and Status. At the bottom right, there are navigation buttons: 'First', 'Prev', 'Page 1 of 1', 'Next', and 'Last'. A 'Back' button is located at the bottom left.

You can then download the remittance csv file at the the bottom of the page via the *Download Results* button.

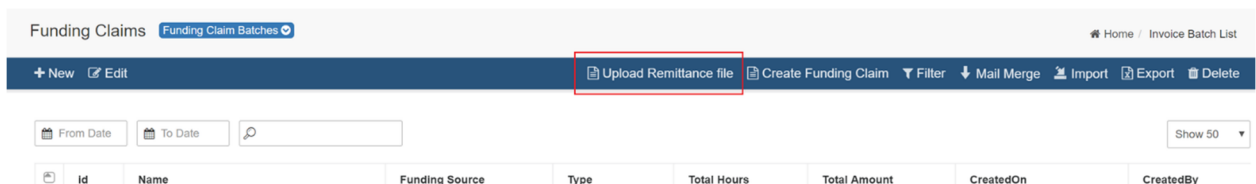
Uploading the Remittance file in Brevity

After downloading the remittance file you can upload this into Brevity to automatically mark the status of the claims. This can be done as follows:

1. Navigate to *Clients > Funding Claims*



2. Then select the *Upload Remittance File* option:



3. You will see the following screen. Upload the Remittance File you downloaded previously, and click *Save and continue* to progress to the next stage:



Step 1 - Upload Remittance CSV file

Select file

Choose File No file chosen

Save and continue

- Step 2: Validate the information from the uploaded file is correct and click the *Import data* button to process the remittance



Step 2

1

registrationnumber	ndisnumber	supportsdeliveredfrom	supportsdeliveredto	supportnumber	claimreference	quantity	unitprice	gstcode
4000000000	4000000000	05/07/2018	09/07/2018	01_019_0120_1_1	47543930-14-19-John-Doe	6.000	43.940	P2

Showing 1 to 1 of 21 entries

Previous 1 2 3 4 5 ... 21 Next

Previous Import data

- Step 3: Confirm claims have been processed successfully



Complete

21 claim records processed successfully!

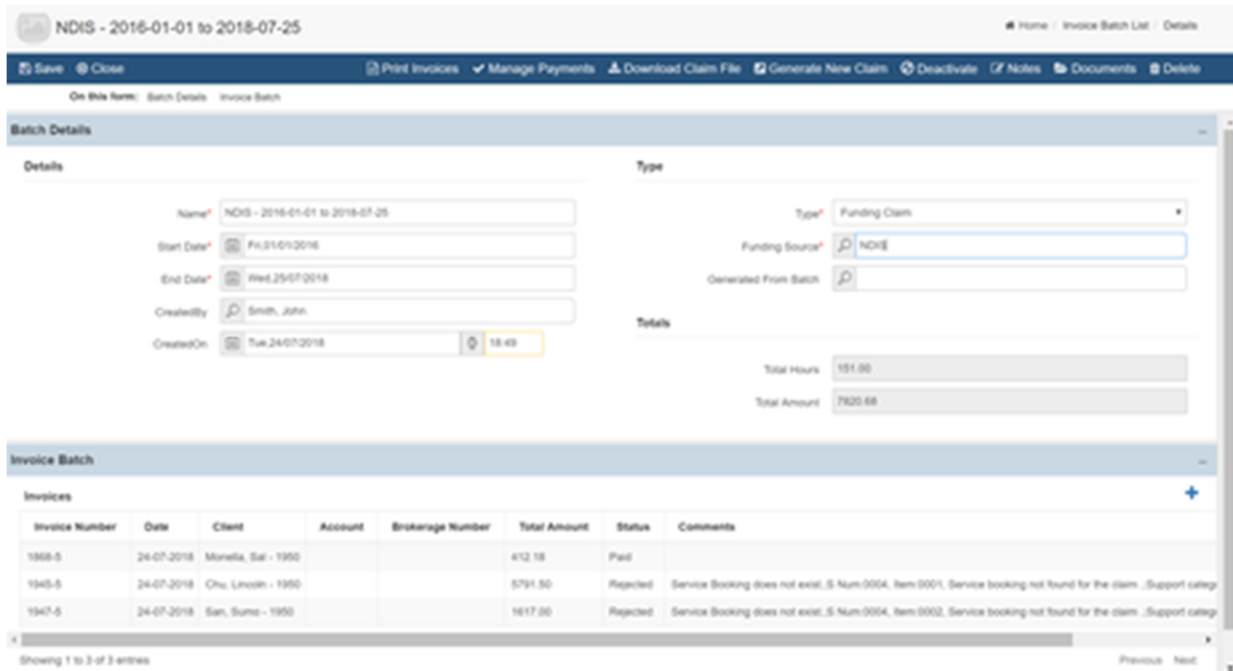
- You can return to the funding claim record to view the results of the import by navigating to *Clients > Funding Claims*

Managing Rejected Claims

You will be able to see rejected claims by returning to the Funding Claim record via *Clients > Funding Claims*. NDIS requires all claims to be unique, and you can't resubmit a claim with a reference number you previously used. Brevity facilitates this by copying

the rejected claims to a new batch, allowing you to fix issues within the new batch, and downloading a new claim file from the new batch.

To copy rejected claims to a new batch click the Generate New Claim button on the toolbar:



The screenshot shows the 'Batch Details' screen for a funding claim. The 'Details' section includes fields for Name, Start Date, End Date, Created By, and Created On. The 'Type' section shows 'Funding Claim' selected, with 'Funding Source' set to 'NDIS'. The 'Totals' section displays 'Total Hours' as 151.00 and 'Total Amount' as 7920.68. Below this is the 'Invoice Batch' section, which contains a table of invoices.

Invoice Number	Date	Client	Account	Brokerage Number	Total Amount	Status	Comments
1908-5	24-07-2018	Monella, Sal - 1950			412.18	Paid	
1945-5	24-07-2018	Chu, Lincoln - 1950			5791.50	Rejected	Service Booking does not exist, S Num:0004, Item:0001, Service booking not found for the claim. Support category
1947-5	24-07-2018	San, Sumo - 1950			1617.00	Rejected	Service Booking does not exist, S Num:0004, Item:0002, Service booking not found for the claim. Support category

To rectify issues with a claim, double-click the invoice within the Batch screen and update as required.

Marking Claim Item as Paid or Cancelled

Only invoices with the status *Awaiting Payment* are exported for claiming. To stop an invoice from being exported within a funding claim, set the status to Paid (if manually processed) or cancelled (if you no longer wish to claim for the services). To do the *Manage Payments* button on the toolbar on the funding claim screen:



This will show the following screen. You are able to update the status and comments of an invoice and save changes from this screen.

Manage Payment Status



Update invoices statuses as required and click Save to apply changes

Invoices

Showing 1 to 2 of 2 entries

Invoice	Client	Amount	Status	Comments
1945-5	Chu, Lincoln - 1950	5791.50	Awaiting Payment ▼	<input type="text"/>
1947-5	San, Sumo - 1950	1617.00	Awaiting Payment ▼	<input type="text"/>