# Manage Service Type Pricing using Pricelists

The ability to to charge clients based on agreed rates, or the rates from a clients NDIS service agreement, is an important requirement. While you are able to charge new clients rates available from the latest pricelist, you will need to renegotiate the service agreement with existing clients before you are able to charge based on updated rates. This means that you will need to be able to charge different rates for services delivered to existing and new clients.
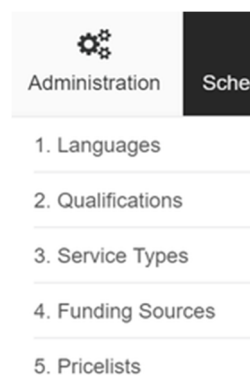
Brevity solves this by means of pricelists. Pricelists in Brevity allows you to setup multiple rates for a service type, and specify which pricelist to use for each service you deliver. In this guide we will look at how to manage pricelists in Brevity. Brevity will load updated NDIS pricelists as they become available for you. You are able to adjust, or create your own pricelists, as required.

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

# Managing Pricelists

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



## Creating a New Pricelist
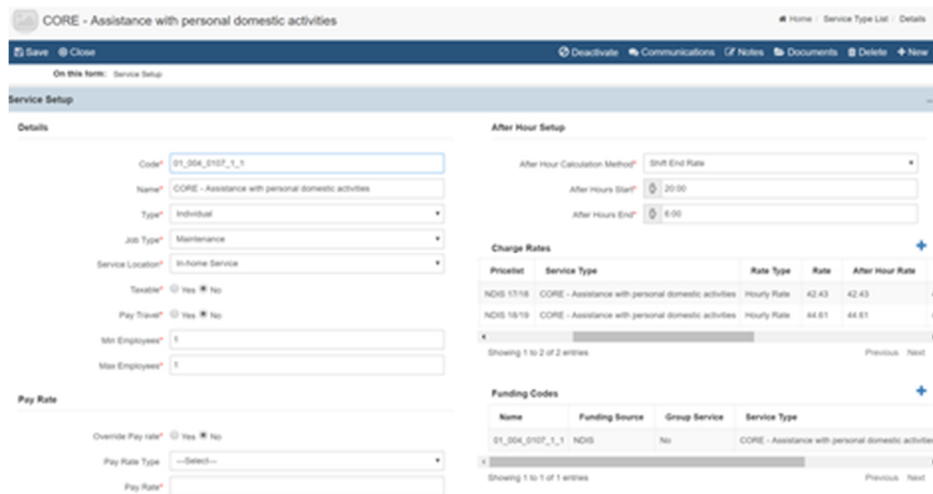
To create a new pricelist, do the following:

1. Click the + New button from the pricelist list screen

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

## Updating a Pricelist

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

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



## Utilising Pricelists

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

## Linking the Pricelist to the Client Funding

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



## Linking the Pricelist to the Service Template

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

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

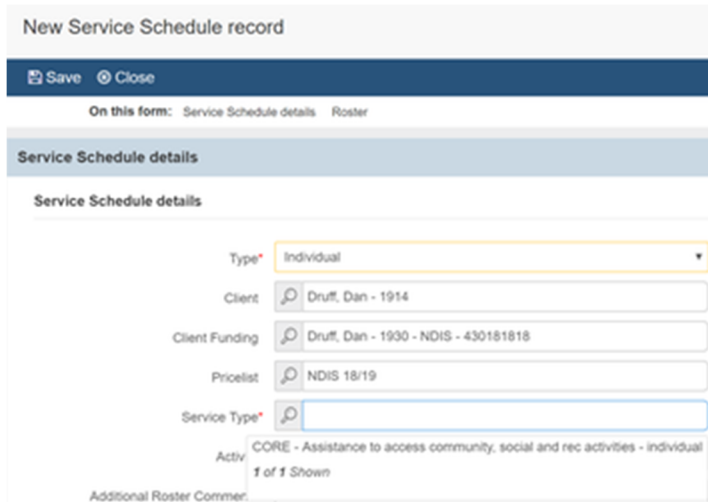**Linking the Pricelist to Service Schedule records**

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