# standard set-up – plan manager

## RESOURCES REQUIRED

* ABN
* NDIS Registration Number
* Logo x 2
* Copy of service agreement as a word document
* Client information
* Provider information
* Support Coordinator information
* XERO / MYOB login
* Invoice to be claimed

## INITIATE KEY SETTINGS

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | * Navigation
* Switch on Contacts, myDocs + History panel
* Administer organisation information
* Customise brand, style + shortcuts
	+ Logos
	+ NDIS Registration number
	+ Email + Domain type
	+ Invoice Remittance Details
* Administer settings
	+ Client – Display key contact additional information
	+ Electronic signatures - reminder frequency
* Customise relationship types
	+ Support Coordinator
* Customise positions
	+ Plan Manager
* Customise products + prices
	+ Customise products families – NDIS
	+ Customise price books – NDIS
	+ Customise invoice settings
	+ Customise NDIS book – Add plan management items only
	+ Customise NDIS price list – Add all items to price book
* Customise invoice templates
	+ Plan Management administration only
	+ Plan Management setup fee
	+ Set-up fee only
 | 0:471:442:202:476:057:007:388:0012:31 |
| GENIUS | Customise settings* General – All
* Client engagements – All
	+ Create schedule of support template
* Invoices + claims
	+ Client budget warning percentage
* Communication
	+ Upload service agreement template
 | 15:0215:3816:5318:43 |

## ADD CLIENTS + CONTACTS

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | Create Client* Email
* Contact name
* Client name (Name on the client file – i.e. Client name + file)
* Position title – Participant
* NDIS number
* Contact information
	+ Phone number
	+ Home address
* Additional information
* Sync contact

Create Representative * Create client
	+ Contact first name
	+ Contact last name
	+ Email
	+ Position title

Create Provider * Create client
	+ Name
	+ Email
	+ Contact first name
	+ Contact last name
	+ Position title
	+ Relationship
	+ ABN
	+ Address details

Create Support Coordinator * Create client
	+ Name
	+ Email
	+ Contact first name
	+ Contact last name
	+ Position title
	+ Relationship
	+ ABN
	+ Address details
 | 21:1122:3323:0223:5024:1925:4227:43 |

## ADD ADDITIONAL STAFF

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | * Create staff
* Contact first name
* Contact last name
* Email
* Phone number
* Position title
* Add staff permissions
* Send login
 | 29:4530:4031:14 |

## STANDARD SET UP WORKFLOW

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| GENIUS | * Create Genius engagement
	+ Add client
	+ Add Representative
	+ Add Support Coordinator
	+ Add Plan Manager
* Create schedule of support
* Generate service agreement
* Create service bookings
* Create invoices to NDIA
* Create one off set-up fees
* Create recurring fees
* Create Plan Managed claim to NDIA
* Add + approve provider invoice
* Create provider claim
* Approve and generate bulk upload/s for the portal
* Upload remittance/s file
 | 31:3734:1634:5235:3439:3439:5240:1441:1241:39, 42:5243:3345:00 |
| ARM  | * Administer API
* Apply permissions
* Link API settings
* Third party permissions
* Organisation link
* Genius account link
	+ Plan Manager – Bank account
	+ Providers – Accounts payable
	+ Clients – Accounts receivable
 | 46:2046:2946:5547:5848:1248:5049:2350:04 |
| GENIUS | * Sync claims
	+ Third party transfer notification
 | 50:40 |
| GENIUS + POCKETWATCH | * Provide access to client dashboard – external contacts
* Review reports
	+ NDIS Invoice + Claims report
	+ Plan utilisation report
	+ Recurring invoice report
 | 52:0054:3055:2356:09 |