# 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 | 0:47  1:44  2:20  2:47  6:05  7:00  7:38  8:00  12:31 |
| GENIUS | Customise settings   * General – All * Client engagements – All   + Create schedule of support template * Invoices + claims   + Client budget warning percentage * Communication   + Upload service agreement template | 15:02  15:38  16:53  18:43 |

## 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 | 21:11  22:33  23:02  23:50  24:19  25:42  27:43 |

## 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 | 29:45  30:40  31:14 |

## 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 | 31:37  34:16  34:52  35:34  39:34  39:52  40:14  41:12  41:39, 42:52  43:33  45:00 |
| 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 | 46:20  46:29  46:55  47:58  48:12  48:50  49:23  50:04 |
| 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 | 52:00  54:30  55:23  56:09 |