# standard set-up – specialist

## RESOURCES REQUIRED

* ABN
* NDIS Registration Number
* Logos
* Service agreement as a word document
* Client information
* Client schedule of support
* XERO / MYOB login

## INITIATE KEY SETTINGS

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | * Navigation
* Switch on Contacts, myDocs + History + Project 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, Plan Manager
* Customise positions
	+ Support Coordinator
* Customise products + prices
	+ Customise products families – NDIS
	+ Customise price books – NDIS
	+ Customise invoice settings
	+ Customise NDIS price list – Add relevant items to price book
* Customise invoice templates
	+ Support Coordination
* Create project template
 | 0:551:442:162:435:106:307:047:3110:3611:20 |
| GENIUS | * Customise settings
* General – All
* Client engagements – All
	+ Create schedule of support template
* Invoices + claims
	+ Client budget warning percentage
* Communication
	+ Upload service agreement template
 | 14:0214:3716:0017:00 |
| PocketWatch | * Settings
	+ Global
	+ Company hours
* Qtime
	+ Activity names
 | 18:3119:16 |

## 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 additional contact
	+ Create contact
	+ Contact first name
	+ Contact last name
	+ Email
	+ Position title
	+ Key contact
 | 20:2821:1721:4322:0422:31 |

## 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
 | 24:2124:56 |

## ADD PROVIDER

|  |  |  |
| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | * Create provider
	+ Create client
	+ Email
	+ Contact name
	+ Client name (Organisation name )
	+ Position title
	+ Contact information
* Add relationship – provider/ plan manager
	+ Business number
	+ Street address - organisation
 | 25:0626:50 |

## STANDRD 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
 | 28:1530:28 |
| ARM | * Review client file - Documents, history, apply project template
 | 33:30 |
| PocketWatch | * Create QTime session
* Generate invoice
 | 34:4536:48 |
| GENIUS | * Create claim to Plan Manager
	+ Approve invoice
	+ Send to plan manager
	+ Mark as paid
 | 38:30 |
| 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
 | 39:05 |
| GENIUS | * Sync claims
	+ Third party transfer notification
 | 42:15 |

|  |  |  |
| --- | --- | --- |
| SCENARIO  | How to process an agency managed claim * Update the engagement
* Create the QTIme item
* Generate the invoices
* Review notes
* Process invoices in GENIUS
* Generate CSV for portal
* Upload Remittance file
* Sync invoice
 |  |
| GENIUS + PocketWatch | * Provide access to client dashboard – external contacts
* Review reports
	+ NDIS Invoice + Claims report
	+ Plan utilisation report
	+ Recurring invoice report
 | 46:1248:12 |
|  | * Summary
 | 51:35 |