# 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

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| 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 | 0:55  1:44  2:16  2:43  5:10  6:30  7:04  7:31  10:36  11:20 |
| GENIUS | * Customise settings * General – All * Client engagements – All   + Create schedule of support template * Invoices + claims   + Client budget warning percentage * Communication   + Upload service agreement template | 14:02  14:37  16:00  17:00 |
| PocketWatch | * Settings   + Global   + Company hours * Qtime   + Activity names | 18:31  19:16 |

## ADD CLIENTS + CONTACTS

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| 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 | 20:28  21:17  21:43  22:04  22:31 |

## ADD ADDITIONAL STAFF

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| --- | --- | --- |
| Module | Action | Video Reference |
| ARM | * Create staff * Contact first name * Contact last name * Email * Phone number * Position title * Add staff permissions   + Send login | 24:21  24:56 |

## ADD PROVIDER

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| --- | --- | --- |
| 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 | 25:06  26:50 |

## STANDRD SET UP WORKFLOW

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| 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 | 28:15  30:28 |
| ARM | * Review client file - Documents, history, apply project template | 33:30 |
| PocketWatch | * Create QTime session * Generate invoice | 34:45  36:48 |
| 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 |

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| --- | --- | --- |
| 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 | 46:12  48:12 |
|  | * Summary | 51:35 |