

<b>QF240</b>	<b>BILLING SET UP CHECKLIST</b>
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Customer Name: \_\_\_\_\_ NDIS Number: \_\_\_\_\_

Plan Start Date: \_\_\_\_\_ Plan End Date: \_\_\_\_\_

<b>Responsible</b>	<b>All</b>	
Billing	Job set up in NAV	
	- Job status set to "Order" in customer card	
	- NAV dimensions set	
Billing	Added to Customer Information Ledger	
Billing	Teleclock Rounding Method	
	- 0.1 Current Individualised to NDIS roll over	
	- 0.25 New Customer/ Current DCSI Brokerage	
<b>Responsible</b>	<b>Transitioning DCIS to NDIS</b>	
CRO	Customer budget completed	
CRO	NDIS plan attached to budget	
Billing	Funds Locked	
Billing	Is the customer self or plan managed? If yes, complete Plan Management checklist	Y / N
Billing	Customer details entered for billing (if externally plan managed or self-managing)	
Billing	Job set up in NAV	
Billing	Rates accurate	
Billing	NDIS number added	
Billing	End of contract date entered	
Billing	DSA work type codes entered, mapped to NDIA	
Billing	Over 20 hours set up fee charged	
Billing	Changed code to have an 'X' on the end	
Billing	All billing completed	
Billing	Remove consumer code	
Billing	Change status to closed	
	<b>NDIS</b>	
CRO	Customer budget completed	
CRO	NDIS plan attached to budget	
Billing	Funds Locked	
Billing	Customer Budget Completed	
Billing	Is the customer self or plan managed? If yes, complete Plan Management checklist	Y / N
Billing	Customer details entered for billing (if externally plan managed or self-managing)	

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Billing	Job set up in NAV	
Billing	Rates accurate	
Billing	NDIS number added	
Billing	End of contract date entered	
Billing	DSA work type codes entered	
Billing	Over 20 hours set up fee charged	
<b>Responsible</b>	<b>Individualised Funding / FFS</b>	
Billing	Customer details entered for billing	
<b>Responsible</b>	<b>DCSI</b>	
Billing	Job set up in NAV	
Billing	Contact ID entered	
Billing	DCSI Portal Checked	
Billing	Usage Report checked and up to date	
<b>Responsible</b>	<b>Billing Pricing Schedule</b>	<b>Rate</b>
Billing	AM Charge Rate	
Billing	PM Charge Rate	
Billing	Weekend Rate	
Billing	Sleep Over Applicable Y / N (sleep over applied in Job Card)	
Billing	Active Applicable Y / N	
Billing	Public Holiday Rate	

Billing Commenced	Date		Billing up to date	Y / N
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Funds to be Locked	Amount Locked
Support Coordination	
Transport	
Core Supports	

Billing Officer: \_\_\_\_\_ Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Manager Use:**

People & Culture Manager Checked	Date:
Executive Officer Checked	Date: