Creating and Managing a Client in BondiByte

Step-by-step guide for client setup, billing details and standalone/community rostering

> **What this guide covers**
> How to create a client record, capture contact and representative details, choose between site-based and standalone/community rostering, confirm plan and billing information, and update the client after creation.

Quick workflow

1. Open Clients and select Add client.
2. Complete the client's profile, contact and address details.
3. Choose the correct rostering model: linked site/house or standalone/community.
4. Add representative, emergency, plan and support information.
5. Create the client, then review billing and roster setup.

Step 1: Open Clients and start a new client record

From the left navigation, open **Clients**. Select **Add client** in the top-right corner to open the client creation form.

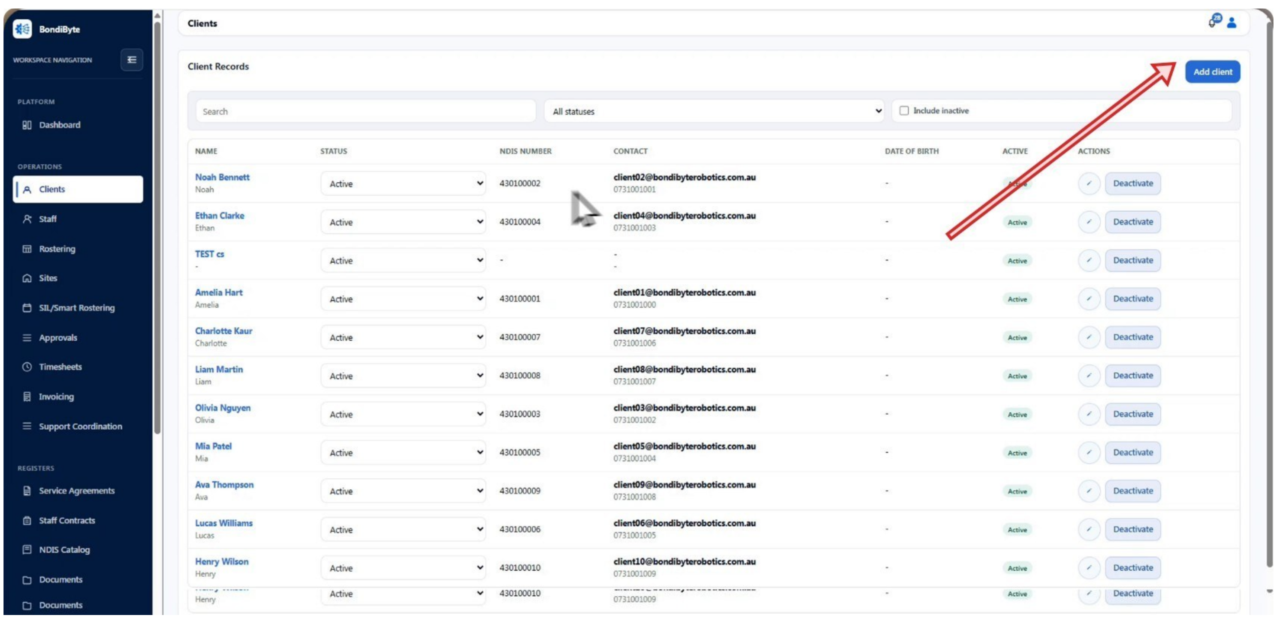

Figure 1. Open Clients and select Add client.

Step 2: Enter the client’s core profile details

Complete the Basic Details section. Use the information exactly as it appears in the client’s records where possible.

- **First name** and last name.
- **Preferred name**, if the client uses one.
- **Date of birth**.
- **Gender**.
- **NDIS number**.
- **Status**, normally Active for a new current client.
- **Internal client reference**. This is optional; BondiByte can generate a reference when one is not supplied.

A **client photo** is optional. After the client is created, the photo can be added or changed from the top of the client profile.

Step 3: Add contact, address and service-delivery information

Continue through the form and capture the details your team needs to safely contact the client and deliver services.

- **Contact details**, including email, phone and mobile where applicable.
- **Preferred contact method** and preferred contact time, where known.
- **Residential address**.
- **Service delivery address**, if services are delivered somewhere different from the residential address.
- **Living arrangement**.
- **Communication notes** or contact restrictions that operational staff should know.

Step 4: Choose the correct rostering model

This is an important setup decision. A client can be rostered through a normal site/house, or they can have their own standalone/community roster area. The two models are mutually exclusive.

Site-based client	Standalone/community client
Use when the client receives support through an existing house, SIL location or service site.	Use when the client receives support outside a site/house and needs their own roster.
Select the relevant Linked site / house and leave standalone/community rostering off.	Enable standalone/community rostering. BondiByte creates a dedicated roster area using the client’s name.

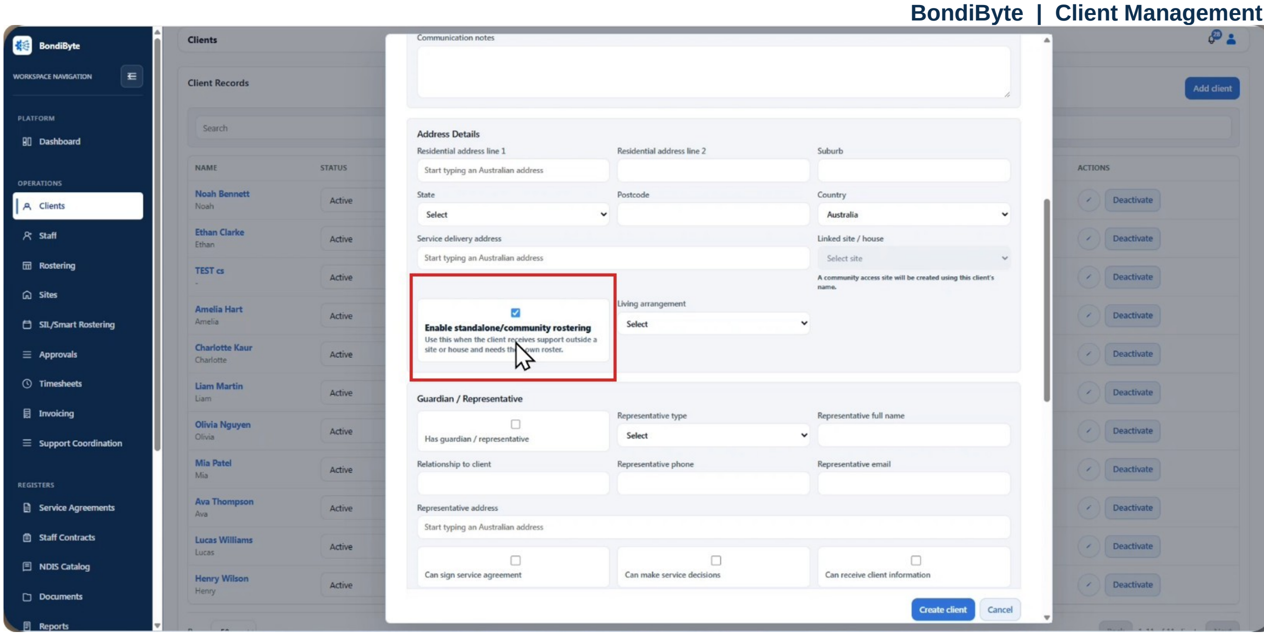

Figure 2. The standalone/community rostering option in the client form.

> **Important roster rule**
>
> A client cannot be linked to a physical site/house and use standalone/community rostering at the same time. If the client is already assigned to a site, remove that site assignment before changing them to standalone/community rostering.

When standalone/community rostering is enabled, the client appears in the Rostering **Site/Client** selector just like other roster areas. This lets your team create and manage shifts for that client without attaching them to another site.

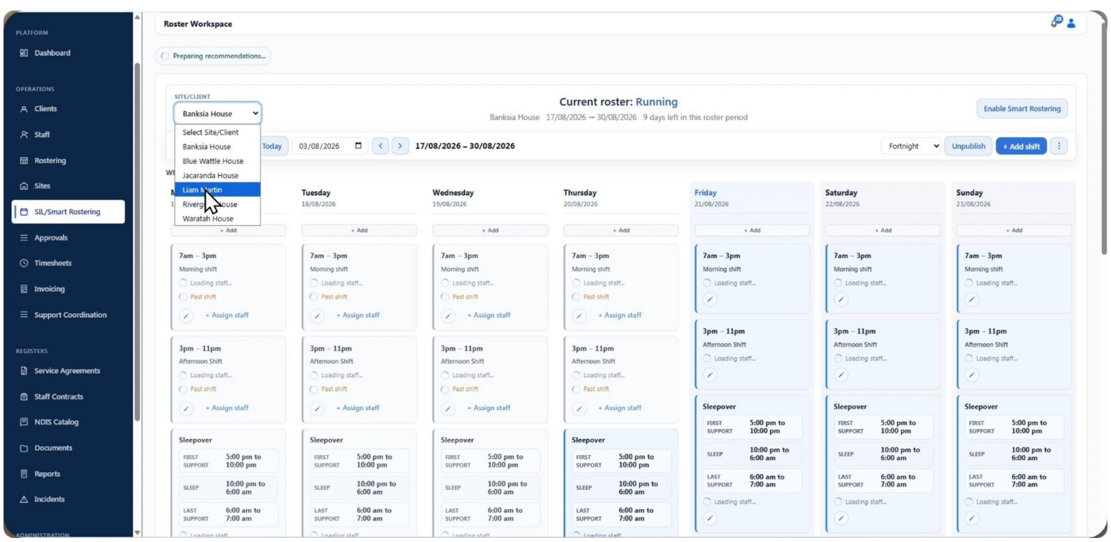

Figure 3. A standalone client appears in the Rostering Site/Client selector using the client's name.

Step 5: Add representative, emergency, plan and support details

Complete the remaining client setup sections that apply to the client. These details help the correct people receive information and support decisions.

- **Guardian / Representative**: record whether the client has a representative, the representative type, name, relationship, phone, email and address.
- **Representative permissions**: record whether the representative can sign service agreements, make service decisions and receive client information, where applicable.
- **Emergency contact**: add the person your team should contact in an emergency.
- **Plan & Support Contacts**: capture the client's plan management arrangement and relevant plan manager, support coordinator, LAC or NDIS plan reference details.

> **Billing and invoicing**
>
> Plan/support contacts and billing details serve different purposes. After the client is created, open the Billing Details tab and confirm the billing contact, organisation, email/address and delivery information used for invoicing. This helps ensure invoices are sent to the correct destination.

Step 6: Create the client and review the profile

When the required information is complete, select **Create client**. The new record will appear in the **Clients** list. Open the client by selecting their name, or use the edit action where available.

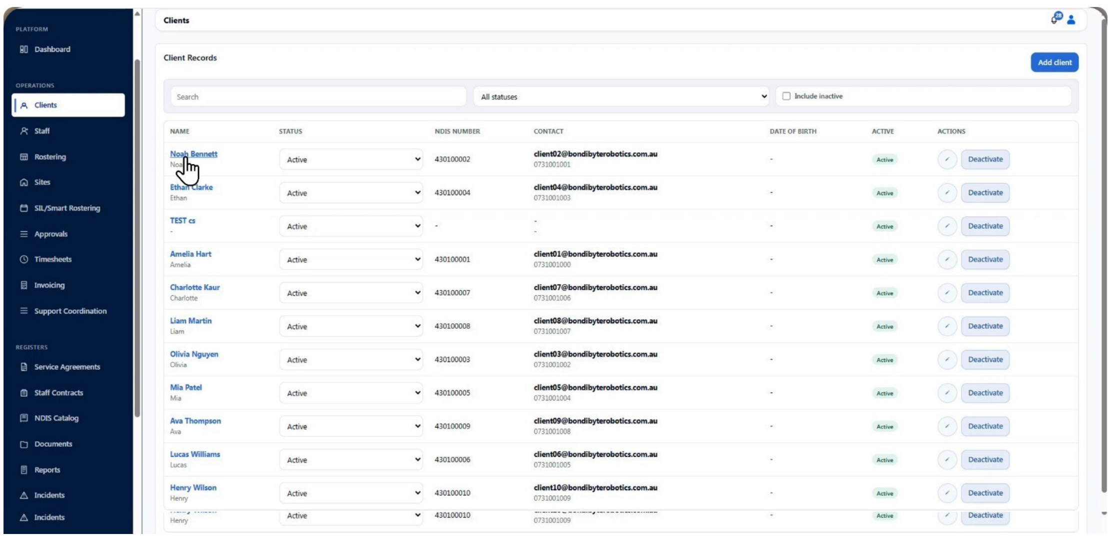

Figure 4. Select the client's name from the Clients list to open the full profile.

The client profile gives your team one place to review and maintain the record. The **Overview** page shows profile details, contact and address information, rostering setup, representative details and plan/support contacts. Additional tabs provide **Billing Details**, **Service Agreements**, **Documentation**, **Reports**, **Sites** and **History**.

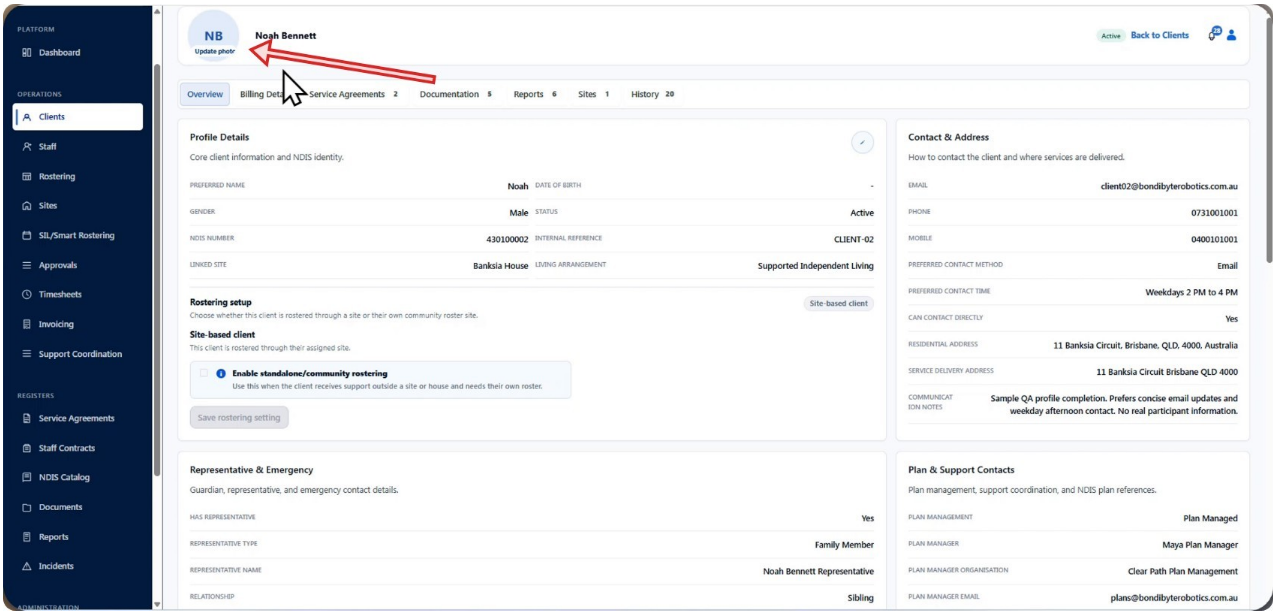

Figure 5. Client profile showing the Overview, rostering setup and related client tabs.

Step 7: Change standalone/community rostering later

You can change the rostering model later, but the current site relationship must be cleared first when moving from site-based to standalone/community rostering.

1. Open the client profile and locate Rostering setup on the Overview page.

2. If the client is linked to a site/house, remove the active site assignment first.

3. Enable standalone/community rostering and save the rostering setting. The client will then appear as their own roster area.

4. To move a standalone client back to site-based rostering, turn standalone/community rostering off, save the change, then assign the client to the required site/house.

> **Why the setting can be unavailable**
> If the standalone/community rostering control is disabled, check whether the client still has an active site assignment. BondiByte prevents both rostering models from being active at the same time so roster data remains consistent.

Client setup validation checklist

☐ Client name, date of birth, NDIS number and status are correct.
☐ Contact and service-delivery addresses are complete.
☐ The correct rostering model is selected: site-based OR standalone/community.
☐ Representative and emergency details are recorded where applicable.
☐ Plan/support contacts are complete.
☐ Billing Details have been checked if the client will be invoiced.
☐ The client appears in the expected site or roster area.

Tip: Keeping client setup accurate at creation time reduces later rostering, invoicing and communication errors.