**NDIA Information Sheet 1**

**NDIA TRACCS PROCESS FLOW**

**INITIAL CONTACT**

**NAME/ADDRESS REGISTRATION**

* **TRACCS** will Auto create an NDIA package for client based on pre-defined templates

**NOTIFICATIONS**

* **TRACCS** will send email notifications to nominated staff/case managers on the distribution list for necessary FYI and follow-up

**DETAILED REGISTRATION**

* + - * Quote created using **TRACCS QikQuote**
      * **TRACCS** will auto-attach Full Service Agreement and written careplan to quote
      * NDIA Goals entered
      * Agency Strategies to achieve goals entered
      * Strategies matched to NDIA Claim Codes and Agency Services
      * Modify careplan/service agreement as required

**INITIAL PERSON TO PERSON CONSULTATION**

* Quote Discussion

**QUOTE ACCEPTANCE / ONBOARDING**

* Check quote for correct NDIA codes
* Do NDIA Portal Booking - Reserving Funding for anticipated services + agency defined buffer/contingency
* IF NDIA claim codes and Portal Booking/Reserve are OK then
  + Enter client NDIA ID
  + Setup Budget alerts in client package
  + Setup management budgets for package support areas
  + Accept Quote/Admission
  + Notifications
* Prepare Master Roster with reference to quoted hours/services