

QF310	EOFY RATE RISE BUDGET CHECKLIST
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Customer Name: _____

Is Customer:

☐ **Over budget?**

If over budget talk to the Customer and reduce services

☐ **Under budget?**

If under budget talk to the Customer and encourage to increase services. Explain to the Customer that unspent funds are returned to the NDIS and allocated funds will reduce for future packages

☐ **Check statement for amount locked**

☐ **Redo budget with new prices**

☐ **Contact Customer – maximum call time 15 minutes (use form QF311)**

☐ **Redo budget**

Increase? This is the aim, increase all Customers packages if under spending

☐ **Yes**

☐ **No**

Is the Customer using another agency?

☐ **Yes**

☐ **No**

If Yes Can Enhanced Lifestyles take over these services?

☐ **Yes**

☐ **No**

☐ **Provide Billing with paperwork, including new amount to be locked**

☐ **Provide paperwork to Admin for scanning**

Signed CRO: _____