

Readiness checklist

Work through this checklist as you prepare to enable the Budget enhancements via the Release Hub. Tick each item when it has been confirmed.

1. Understand what's changing

- ☐ Key people have read the **What's changing in budgets and why** article.
- ☐ Key people have read **Budgets: An overview** and **Creating and managing budgets** articles.
- ☐ Register for a Q&A webinar, or watch a recording once available.

2. Roles and readiness

- ☐ Care partners, finance, and rostering are aware the change is coming.
- ☐ The person who will enable the enhancements via the **Release Hub** has been identified.
- ☐ One or two people have been nominated to become familiar with the enhancements first and support others.

3. Know the impact

- ☐ Each team understands what is changing and how it will impact their role.
- ☐ Your team has read the known limitations (**see our Adopting the budget enhancements: a rollout guide**).
- ☐ Finance understands how billing and claiming activity can affect live budgets information, particularly when using the expense tracking bulk actions.
- ☐ You've decided what, if anything, to tell Members, and who will tell them.

4. Data and technical review

There are no breaking changes. New data is added across the API and data exports, but insight levels and funding source defaults now work differently, which may affect existing reports and alerts.

- ☐ You have read the **release notes** to familiarise yourself with these new additions and non-breaking changes, and discussed with your technical teams on what you may want to include or update across any integrations or reports.

5. Configuration and setup

- ☐ Your Aged Care Provider Portal connection (via PRODA) is syncing.
- ☐ Each Support at Home Member has an approved budget plan covering the current period.
- ☐ Services have the correct program codes applied, where applicable.
- ☐ You've reviewed who has the Budgets bulk actions permission.
- ☐ If you plan to use the Funding Analyser with Lookout Assist, you're on the new MSA contract.

6. After you enable

- ☐ Your team knows where to find help: support articles, Q&A, and the Support Team.
- ☐ Your team knows how to report an issue: what to check first, and what to include.
- ☐ A plan is in place for monitoring utilisation. (**See our [Staying on top of utilisation article](#)**).

