

ADP claims, from first call to closed case

How Fusion Claims runs an ADP case in Odoo, from booking the assessment to closing the case, with the screen for each step.



Contents

The manager's brief is written to be read on its own, in a few minutes. The walkthrough shows every step on the screen where it happens.

1

The manager's brief

What the system is, what it removes from the day, and how a project works.

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The walkthrough

Each phase, then each step with its whole screen.

1 Intake and assessment	8
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6 Audit and records	34

3

Next steps

Other funding programs, common questions and how to book a call.

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Fusion Claims at a glance

Fusion Claims runs your ADP cases in Odoo 19, built and supported by Nexa Systems.

It tracks each claim from quotation through submission, approval, billing and closure, with the screens, checks and documents for every step on the case.

Who it is for

ADP equipment vendors: the office, sales reps and technicians, with a portal of their own for each therapist.

Next step

Book a one-hour call at nexasystems.ca/appointment/1, or call 905-792-0000.

What your office gets

- ✓ Applications and signed pages land on the case instead of in email attachments.
- ✓ A case cannot be marked ready for submission, or move to billing, with a required document missing.
- ✓ The claim file for ADP is built for you, and a price mismatch stops it before ADP sees it.
- ✓ Late applications are followed up by email, four and eight days after the assessment.
- ✓ Partial approvals and deductions reach the ADP and client portions without working them out by hand.
- ✓ Each case keeps its audit trail as it moves, and every claim file sent stays on record.

What is included

1 Intake and assessment
4 steps, page 8

2 Application
3 steps, page 13

3 Submission and approval
6 steps, page 17

4 Ordering and delivery
2 steps, page 24

5 Billing and ADP invoicing
6 steps, page 27

6 Audit and records
3 steps, page 34

How it is delivered

Custom-coded around your process after a first meeting.

Hosted on our own servers in Ontario.

Supported by the team that built it: business hours for everyone, plus an emergency line for hosted clients.

Where an ADP case can stall

Each row is a step in the walkthrough, shown on its own screen.

Without a system

A therapist still owes the application, and someone has to remember to ask.

A page was not signed at the visit, and the client has to be seen again.

A submission is about to go out without its final PDF, or with an XML file saved as .txt.

ADP approves only some devices, or applies a deduction, and the ADP and client portions have to be reworked and billed separately.

At billing or audit time, someone has to find the supplier bill behind each device.

An ADP audit request arrives, and the evidence has to be gathered from folders.

With Fusion Claims

The system emails the therapist four days after the assessment and again at eight, and notes it on the case.

Page 11 can be signed on screen during the assessment, or sent to sign remotely.

Submission Verification needs the final PDF and XML file and refuses a wrong file type, so the gap is caught in the office.

Staff record the approval once. The portions are recalculated, and the ADP and client invoices each hold only their own portion.

The system matches each device to posted supplier bills by serial number and purchase order, and a person confirms the uncertain matches.

Each case keeps its ADP Order Trail, and the audit workbench checks the evidence line by line and builds the evidence pack.

2 Step 2.2
Page 15

1 Step 1.4
Page 12

3 Step 3.1
Page 18

3 Step 3.3
Page 20

5 Step 5.3
Page 30

6 Step 6.1
Page 35

The whole journey on one page

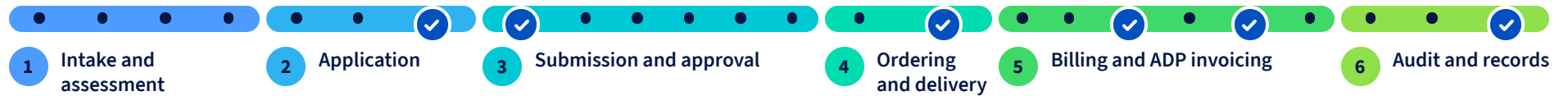
Six phases, from the therapist's first call to the closed case. Signatures, purchasing and early client invoicing can overlap, so no step waits for one it does not need.

1	Intake and assessment	2	Application	3	Submission and approval	4	Ordering and delivery	5	Billing and ADP invoicing	6	Audit and records						
The therapist calls or emails, your office books the visit, and the assessment becomes the client record and a draft quotation for the rep to review.		The therapist's application comes in through their own portal, the system follows up when it is late, and your office checks it before it moves on.		Files are checked before they go to ADP, the response is recorded on the case, and the client, rep and therapist hear about approvals.		Equipment can be ordered before or after approval, and delivery is scheduled and proven on the case.		The client's portion and ADP's portion go on separate invoices, and supplier bills and prices are checked before ADP is billed.		Each case keeps its audit trail as it moves, every claim file stays on record, and closing a case checks its paperwork.							
1.1	Book the assessment Office, Sales rep, Therapist	9	2.1	Receive documents through the therapist portal Therapist, Office	14	3.1	Check the files before submission Office, System	18	4.1	Order the equipment Office	25	5.1	Apply the deduction Office, System	28	6.1	Keep the audit trail on the case System, Office	35
1.2	Run the express assessment Sales rep	10	2.2	Follow up on a late application System	15	3.2	Record the submission and ADP's response Office	19	4.2	Deliver and keep the proof of delivery Office, Technician	26	5.2	Invoice the client's portion Office	29	6.2	Keep every claim file System	36
1.3	Review the quotation built from the assessment System, Sales rep	11	2.3	Process the application in the office Office	16	3.3	Record the approved devices Office, System	20				5.3	Match supplier bills to the case System, Office	30	6.3	Close the case Office, System	37
1.4	Collect the signed pages Client, Sales rep	12				3.4	Read the ADP status report PDF (optional) Beta Office, System	21				5.4	Create the ADP invoice Office, System	31			
						3.5	Tell the client and rep about the approval System	22				5.5	Export the claim file for ADP Office, System	32			
						3.6	Send each therapist one summary System, Therapist	23				5.6	Follow up on corrections and payment Office, System	33			

Screens show invented data from a demo company. Steps marked Beta are in testing.

What the system checks for you

These checks run inside Fusion Claims before a case can move on.



✓ Ready for submission

Authorization date, client references, reason for application and signed pages are in place.

Checked at step 2.3, page 16

✓ Submission files

A device type, the final application PDF and the XML file are attached, with the right file types.

Checked at step 3.1, page 18

✓ Ready to bill

Approval, completed device verification, the delivery date and the proof of delivery PDF.

Checked at step 4.2, page 26

✓ Supplier bill matching

Each device is matched to a posted supplier bill, and uncertain matches wait for a person.

Checked at step 5.3, page 30

✓ Portions and deductions

Every exported portion is checked against the ADP device price list, and a mismatch stops the export.

Checked at step 5.5, page 32

✓ Closing the case

Signed pages, final application, proof of delivery and supplier bills, or a written reason.

Checked at step 6.3, page 37

Where a case has to move on without an item, a manager records an override or a written reason, and it stays on record.

Who uses it

Westin Healthcare and Mobility Specialties run their ADP work on Fusion Claims every day.

Built for ADP vendors

Runs inside Odoo 19

Each case links to its quotation, purchase orders and invoices, so the ADP work and the rest of the order stay in one system.

Written around ADP's own paperwork

Page 11 and Page 12 signatures, the final application PDF and XML file, ADP and client portions, deductions, the .txt claim file and the status report PDF all have their own place on the case.

More than ADP

ODSP and March of Dimes cases get their own workflows, and WSIB, insurance, Muscular Dystrophy Canada and hardship cases are tracked with their own statuses.

Clear about what it does

Your staff still submit and upload on the ADP portal. Fusion Claims checks the files first, builds the claim file and records what was sent.

A Toronto team

Nexa Systems is based in Toronto, Ontario, and builds custom ERP systems and business apps on Odoo.

How a project works with Nexa

1

A first meeting

We meet your team to see how cases come in, who handles them and how you bill today.

2

Built around your process

Every project is custom-coded after that meeting, around the way your office runs ADP cases.

3

Hosted in Ontario

Your system runs on our own servers in Ontario.

4

Supported by the team that built it

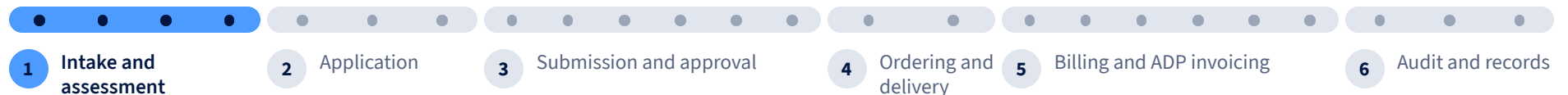
Business hours support for everyone, plus an emergency line for hosted clients.

Fusion Claims is built on Odoo. Every project is custom-coded, so this guide lists no prices.

Intake and assessment

The therapist calls or emails, your office books the visit, and the assessment becomes the client record and a draft quotation for the rep to review.

1.1	Book the assessment No separate calendar invites or reminder calls to set up for each visit.	Office Sales rep Therapist	9
1.2	Run the express assessment The assessment is typed once, and the client and order come from it.	Sales rep	10
1.3	Review the quotation built from the assessment Reps start from a filled-in quotation, and nothing reaches the client before a person checks it.	System Sales rep	11
1.4	Collect the signed pages A page that was not signed on paper can be signed without another visit.	Client Sales rep	12



RC

Riley Castellano

SALES REPRESENTATI...

Today

Jobs

Cases

Me

Sales Representative

Times shown in America/Toronto.

1. Who called?

OCCUPATIONAL THERAPIST / CONTACT

Elena Marchetti (elena.marchetti@example.com) X

2. Who are we meeting?

Gordon Pyke

905-555-0128

3. Where?

31 Tamarack Hollow, Burlington, ON L7L 9M3

Type the full address (street, city, province, postal code).

4. When?

DATE

2026-10-08

TIME

01:00 PM

Check

30 min

45 min

60 min

90 min

You have 1 appointment Thu, Oct 8

Available

10:30 AM-11:30 AM Assessment with Harriet Pembleton and Elena Marchetti (OT) for T2 Rollator

41 Quillmoss Lane, Mississauga, ON L5M 9A1

Free slots (tap to pick)

9:00 AM

9:30 AM

12:30 PM

1:00 PM

1:30 PM

2:00 PM

2:30 PM

3:00 PM

3:30 PM

4:00 PM

1 Step 1.1 of 24

Book the assessment

Office Sales rep Therapist

What happens

When the therapist calls or emails, your office or rep enters the booking with the client, location and demo equipment; therapists can also request one from their portal. The therapist gets an invitation and a reminder the evening before.

What it saves you

No separate calendar invites or reminder calls to set up for each visit.

ADP claims, from first call to closed case

The walkthrough: Intake and assessment

9

RC

Riley Castellano

SALES REPRESENTATI...

Today

Jobs

Cases

Me

Sales Representative

Client Information

FIRST NAME *

Gordon

MIDDLE NAME

LAST NAME *

Pyke

CLIENT TYPE *

REG - Regular ADP

HEALTH CARD NUMBER *

0175930462

VERSION CODE

QR

STREET ADDRESS *

31 Tamarack Hollow

UNIT/APT/SUITE

e.g., Unit 5, Apt 302

CITY *

Burlington

PROVINCE *

Ontario

POSTAL CODE *

L7L 9M3

PHONE NUMBER *

905-555-0128

EMAIL

gordon.pyke@example.com

CLIENT WEIGHT (LBS)

212

Save draft

Reopen saved draft

Changes not yet saved.

Confirm Assessment

Cancel

This saves the assessment and builds a draft quotation. You can choose whether to send it after reviewing it, or edit it later.



1 Step 1.2 of 24

Run the express assessment

Sales rep

What happens

The rep fills in the ADP Assessment Express Form: equipment, client and health card details, assessment dates, client type and reason for application. Completing it creates or links the client and a draft order.

What it saves you

The assessment is typed once, and the client and order come from it.

RC

Riley Castellano

SALES REPRESENTATI...

Today

Jobs

Cases

Me

Sales Representative

Assessment confirmations

Queued: 3

Configure office completion recipients.

Prepare missing confirmations

Next action: **Follow up with client and OT**, assigned to Riley Castellano, due 10/06/2026.

Quotation details

ADP Manual Wheelchair

Quickie QS5 X Manual Wheelchair	\$ 2,290.00
Quantity: 1.00; unit price: \$ 2,290.00	
Vicair O2 XXTRA Bariatric Seat Cushion	\$ 1,000.00
Quantity: 1.00; unit price: \$ 1,000.00	

Current draft total including tax: \$ 3,290.00

ADP portion: \$ 2,467.50

Client portion: \$ 822.50

Preview quotation PDF

Edit quotation

This sends the current quotation PDF to the client email shown above.

Send quotation to client

Finish without sending a quotation

Your assessment and quotation stay saved. You can return to the quotation later.



1 Step 1.3 of 24

Review the quotation built from the assessment

System Sales rep

What happens

When a quote profile matches the assessment, the draft quotation is filled in for the rep. The rep reviews it, then sends it to the client or finishes without sending.

What it saves you

Reps start from a filled-in quotation, and nothing reaches the client before a person checks it.

RC

Riley Castellano

SALES REPRESENTATI...

Today

Jobs

Cases

Me

Sales Representative

APPLICATION SIGNED BY *

☒ Applicant
 ☐ Agent (on behalf of applicant)

Declaration and Consent

I declare that the information I have given in this Application for Funding Assistance is true and correct. I agree to repay any overpayment that may be required if the information is not correct or complete. I authorize the Assistive Devices Program to collect and use my personal information as described on the Information Sheet.

I understand that this application will be reviewed by the Assistive Devices Program and that I will be notified of the decision.

☒ I have read and agree to the above declaration

SIGNATURE



Clear Signature

Save draft

Reopen saved draft

✓ Confirm Assessment

Cancel

Draft saved.

This saves the assessment and builds a draft quotation. You can choose whether to send it after reviewing it, or edit it later.



1 Step 1.4 of 24

Collect the signed pages

Client Sales rep

What happens

During the assessment the applicant or agent can sign the Page 11 consent on screen, and the system saves it as a PDF. The full assessment screen captures the Page 11 and Page 12 signatures, and Page 11 can also be sent to sign remotely.

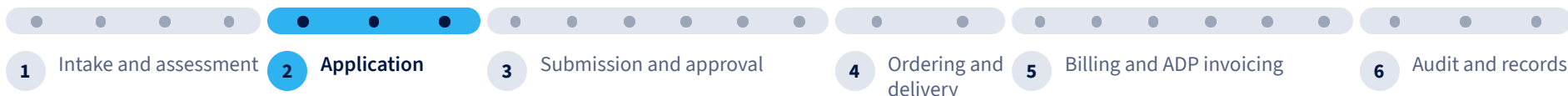
What it saves you

A page that was not signed on paper can be signed without another visit.

Application

The therapist's application comes in through their own portal, the system follows up when it is late, and your office checks it before it moves on.

2.1	Receive documents through the therapist portal Applications and signed pages land on the case instead of in email attachments.	Therapist Office	14
2.2	Follow up on a late application Nobody keeps a list of which therapists still owe an application.	System	15
2.3	Process the application in the office A case with a missing item cannot be marked ready, and the screen lists what is missing.	Office	16



EM

Elena Marchetti
AUTHORIZER OT

Queue

Cases

Docs

Schedule

Me

Dashboard

S00007

Client: Gordon Pyke

Waiting for Application

✓

QUOTATION

Oct 6, 2026

●

CONFIRMED

○

FUNDING APPROVED

○

DELIVERY SCHEDULED

○

DELIVERED

Case Details

Order Date: 10/06/2026

Sales Rep: Riley Castellano

Client: Gordon Pyke

Funding Status: Waiting for Application

Address:
31 Tamarack Hollow
Burlington, L7L 9M3

Reason: First Time Access - NO previous ADP

Important Dates

Assessment Start: 10/06/2026

Authorization: 10/06/2026

Assessment End: 10/06/2026

Delivery and Tracking

Documents

Full ADP Application

Choose File gordon_application_rev2.pdf

Seat width corrected

Upload

Original ADP Application
v1 - 10/06/2026

Other Attachments

No additional attachments.

2 Step 2.1 of 24

Receive documents through the therapist portal

Therapist Office

What happens

Each therapist signs in to their own portal, sees only their own cases and uploads the application, signed pages or other documents to the case. A new upload keeps the earlier copy as a past revision.

What it saves you

Applications and signed pages land on the case instead of in email attachments.

ADP claims, from first call to closed case

The walkthrough: Application

14

Fusion Claims

Dashboard

All Orders

ADP

ODSP

MOD

Other Fundings

Assessments

Vendor Bill Evidence

ADP Audits

+

Maplecrest Mobility Supply

New

S00003 - Constance Achterberg

Page 11 Requests

1/1

Send

Re-match Vendor Bills

Request Page 11 Signature

Application Received

Create PO

Quotation

Print

Confirm

Preview

Cancel

Send Fax

Generate Auto Quote

Quotation Stage

Waiting for Application

Ready for Submission

Application Submitted

...

S00003

Customer

Constance Achterberg

12 Larchwind Drive

Oakville L6J 9C3

Canada

Salesperson

Riley Castellano

Expiration

Nov 5

Payment Terms

Immediate

Sale Type

ADP

Authorizer

Theo Lindqvist

Client Type

REG

Order Lines

Other Info

Portal

Delivery Photos

ADP Case Details

Delivery

ADP Summary

ADP Order T

Product	S/N	Qty	Unit Price	Taxes	Amount	ADP \$	
ADP Rollator							\$ 254.00
Evolution Xpresso Trillium Two Roll...		1.00	254.00	0% Int	\$ 254.00	\$ 190.50	\$ 63.50
ADP and client portions follow the client type and the devices ADP approves.							
Add a product Add a section Add a note Catalog							
Terms and conditions...						Untaxed Amount:	\$ 254.00
						Taxes:	\$ 0.00
						Total:	\$ 254.00
						Total ADP Portion:	\$ 190.50

Send message

Log note

Activity

OdooBot

12:13 AM

Application Reminder sent

To: theo.lindqvist@example.com

CC: riley.castellano@example.com

OdooBot

12:13 AM

Subject: Application Reminder - Constance Achterberg - S00003

Riley Castellano

12:10 AM

Subject: Assessment Confirmed - Constance Achterberg - S00003

Riley Castellano

12:10 AM

Subject: Assessment Confirmed - Constance Achterberg - S00003

Riley Castellano

12:10 AM

Subject: Assessment Confirmed - Constance Achterberg - S00003

Riley Castellano

12:10 AM

\$ 0.00 → \$ 254.00 (Total)

\$ 0.00 → \$ 254.00 (Untaxed Amount)

Riley Castellano

12:10 AM

ADP device-code checks - review these lines:

Evolution Xpresso Trillium Two Rollator - serial number required at delivery

Riley Castellano

12:10 AM

Auto-Quote generated

Profile: ADP Rollator

Lines added: 3 - Drawings attached: 0

2

Step 2.2 of 24

Follow up on a late application

System

What happens

If no application is recorded four days after the assessment, the system emails the therapist, copies the rep and office, and notes it on the case. A second follow-up goes out at eight days. Both delays can be changed.

What it saves you

Nobody keeps a list of which therapists still owe an application.

Fusion Claims Dashboard All Orders ADP ODSP MOD Other Fundings Assessments Vendor Bill Evidence ADP Audits + Maplecrest Mobility Supply

New S00007 - Gordon Pyke

Send Re-match Vendor Bills Request Page 11 Signature Application Received Create PO Quotation Send message Log note Activity

Print Confirm Preview

S00007

Customer Gordon Pyke
31 Tamarack H
Burlington L7L
Canada

Salesperson R Riley Castle

Order Lines Other Info

Product

- ADP Manual Wheelchair
- Quickie QS5 X Manual Whe
- Vicair O2 XXTRA Bariatric S

Add a product Add a section

Terms and conditions...

Untaxed Amount: \$ 3,290.00
Taxes: \$ 0.00
Total: \$ 3,290.00

Total ADP Portion: \$ 2,467.50

Auto-Quote generated
Profile: ADP Manual Wheelchair
Lines added: 3 - Drawings attached: 0

Riley Castellano 12:51 AM
Page 11 Consent Information

Application Received

Upload Required Documents
Please upload the ADP application documents received from the client, then tell the system how pages 11 & 12 were provided.

HOW WERE PAGES 11 & 12 PROVIDED?

☐ Pages 11 & 12 are INCLUDED in the original application
☒ Pages 11 & 12 are a SEPARATE file
☐ Pages 11 & 12 will be SIGNED REMOTELY

ORIGINAL ADP APPLICATION		SIGNED PAGES 11 & 12	
Original ADP Application ?	gordon_application_rev	Signed Pages 11 & 12 ?	gordon_signed_pages.r
Detected pages ?	0		
Notes ?	Revision 2 received through the authorizer portal.		



2 Step 2.3 of 24

Process the application in the office

Office

What happens

Staff record the application as received, keep the original PDF and note how the signed pages arrived. Before a case can be marked Ready for Submission, the system checks the authorization date, client references, reason for application and signed pages.

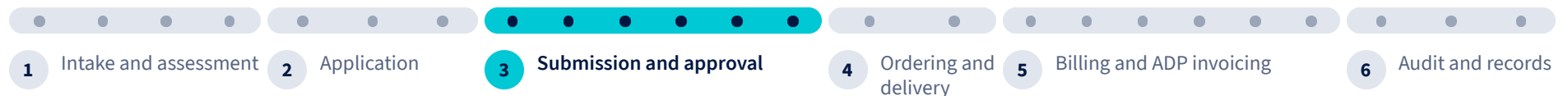
What it saves you

A case with a missing item cannot be marked ready, and the screen lists what is missing.

Submission and approval

Files are checked before they go to ADP, the response is recorded on the case, and the client, rep and therapist hear about approvals.

3.1	Check the files before submission A submission missing its final PDF or XML file is caught in the office, before it goes to ADP.	Office System	18
3.2	Record the submission and ADP's response Anyone can see what was submitted, when, and what ADP said, without asking who sent it.	Office	19
3.3	Record the approved devices Partial approvals and deductions reach the portions and invoices without working them out by hand.	Office System	20
3.4	Read the ADP status report PDF (optional) Beta Approvals on the report reach their cases without keying each one in.	Office System	21
3.5	Tell the client and rep about the approval Clients and reps hear about approvals without a phone call from the office.	System	22
3.6	Send each therapist one summary Therapists get one weekly email instead of a stream of separate ones.	System Therapist	23



The screenshot displays the Fusion Claims application interface. At the top, a navigation bar includes links like 'Fusion Claims', 'Dashboard', 'All Orders', 'ADP', 'ODSP', 'MOD', 'Other Fundings', 'Assessments', 'Vendor Bill Evidence', 'ADP Audits', and a user profile for 'Maplecrest Mobility Supply'. The main header shows 'New S00007 - Gordon Pyke'. Below this, a toolbar contains buttons such as 'Send', 'Re-match Vendor Bills', 'Submit Application', 'Create PO', 'Print', 'Confirm', 'Preview', 'Quotation', 'Send message', 'Log note', and 'Activity'. The central area is titled 'Submit Application - Verify Device Types' with a sub-header 'Stage 1: Submission Verification'. Instructions state: 'Select which device types are being submitted in the ADP application. This selection will be compared against the approval letter during Stage 2 verification.' An 'Invalid Operation' modal is open, displaying the error: 'XML file must have .xml extension. Uploaded: 'demo-application.txt''. A 'Close' button is present. In the background, a table lists files for submission:

FINAL APPLICATION (PDF)		XML DATA FILE	
Final Submitted Application ?	gordon_final_application.pdf	XML Data File ?	demo-application.txt

At the bottom of the modal, there are buttons for 'Select All', 'Confirm Submission', and 'Cancel'. The background also shows a summary of the application with 'Untaxed Amount: \$ 3,290.00', 'Taxes: \$ 0.00', and 'Total: \$ 3,290.00'. A note indicates 'Auto-Quote generated' for 'Profile: ADP Manual Wheelchair' with 'Lines added: 3' and 'Drawings attached: 0'. A user 'Riley Castellano' is noted as having generated the quote at '12:51 AM'.



3 Step 3.1 of 24

Check the files before submission

Office System

What happens

Submission Verification needs at least one device type, the final application PDF and the XML data file, and refuses a file with the wrong extension, such as an XML file saved as .txt. XML import reports a file it cannot read.

What it saves you

A submission missing its final PDF or XML file is caught in the office, before it goes to ADP.

Fusion Claims
Dashboard
All Orders
ADP
ODSP
MOD
Other Fundings
Assessments
Vendor Bill Evidence
ADP Audits
+

Maplecrest Mobility Supply

New
S00007 - Gordon Pyke
Client Profile
1 / 1

Send
Re-match Vendor Bills
Mark as Approved
Put On Hold
Withdraw

Review Submission
Create PO
Print
Confirm
Preview
Cancel
Send Fax

Generate Auto Quote

...
Ready for Submission
Application Submitted
Application Approved
Ready to Bill
Billed to ADP
...

S00007

Customer
Gordon Pyke
31 Tamarack Hollow
Burlington L7L 9M3
Canada

Salesperson
Riley Castellano

Expiration
Nov 5

Payment Terms
Immediate

Sale Type
ADP

Authorizer
Elena Marchetti

Client Type
REG

Order Lines
Other Info
Portal
Delivery Photos
ADP Case Details
ADP Documents
Delivery
ADP Summary

Awaiting ADP Response
Application submitted. When the approval letter arrives, use the "Mark as Approved" button in the header.

Application Documents
Submission Documents

ORIGINAL ADP APPLICATION *

FINAL APPLICATION

Planned Activities

Today: "Follow up with client and OT" for Riley Castellano
Check quotation receipt, answer questions and record the next agreed step.
Mark Done
Edit
Cancel

Today

Morgan Ashby 12:53 AM
Ready for Submission → Application Submitted (ADP Application Status)
None → 10/06/2026 (Claim Submission Date)

Morgan Ashby 12:53 AM
Application Submitted
Date: October 06, 2026
Device Types Submitted:
Adult Lightweight Performance Manual Wheelchair
Seat Cushion
Submitted by Morgan Ashby

Morgan Ashby 12:53 AM
Submission #1 Recorded
Type: Initial Submission
Date: October 06, 2026
By: Morgan Ashby

Morgan Ashby 12:53 AM
Application Submitted email sent
To: gordon.pyke@example.com
CC: elena.marchetti@example.com, riley.castellano@example.com

3
Step 3.2 of 24

Record the submission and ADP's response

Office

What happens

Your staff submit on the ADP portal, then record it in Fusion Claims: the devices, final PDF and XML file are stored on the case with its submission history. Accepted, rejected and correction responses are recorded the same way.

What it saves you

Anyone can see what was submitted, when, and what ADP said, without asking who sent it.

New

Application Approved with Deduction - ...

Open Document

1 / 1

<

>

Send & Close

Cancel

Outgoing

Sent

Received

Delivery Failed

Cancelled

Subject

Application Approved with Deduction - Walter Brisebois - S00002

by Jordan Pellerin on Oct 6, 12:20 AM

From ? "Jordan Pellerin" <jordan.pellerin@example.com>

To ? walter.brisebois@example.com

To (Partners)

Cc ? riley.castellano@example.com

Reply-To ? "Jordan Pellerin" <jordan.pellerin@example.com>

Scheduled Send Date ? YYYY-MM-DD HH:MM:SS

Body

Attachments

MAPLECREST MOBILITY SUPPLY

Application Approved

The ADP application for **Walter Brisebois** has been **approved with deduction**.

CASE DETAILS

Case	S00002
Client	Walter Brisebois
Claim Number	0000417002



3 Step 3.5 of 24

Tell the client and rep about the approval

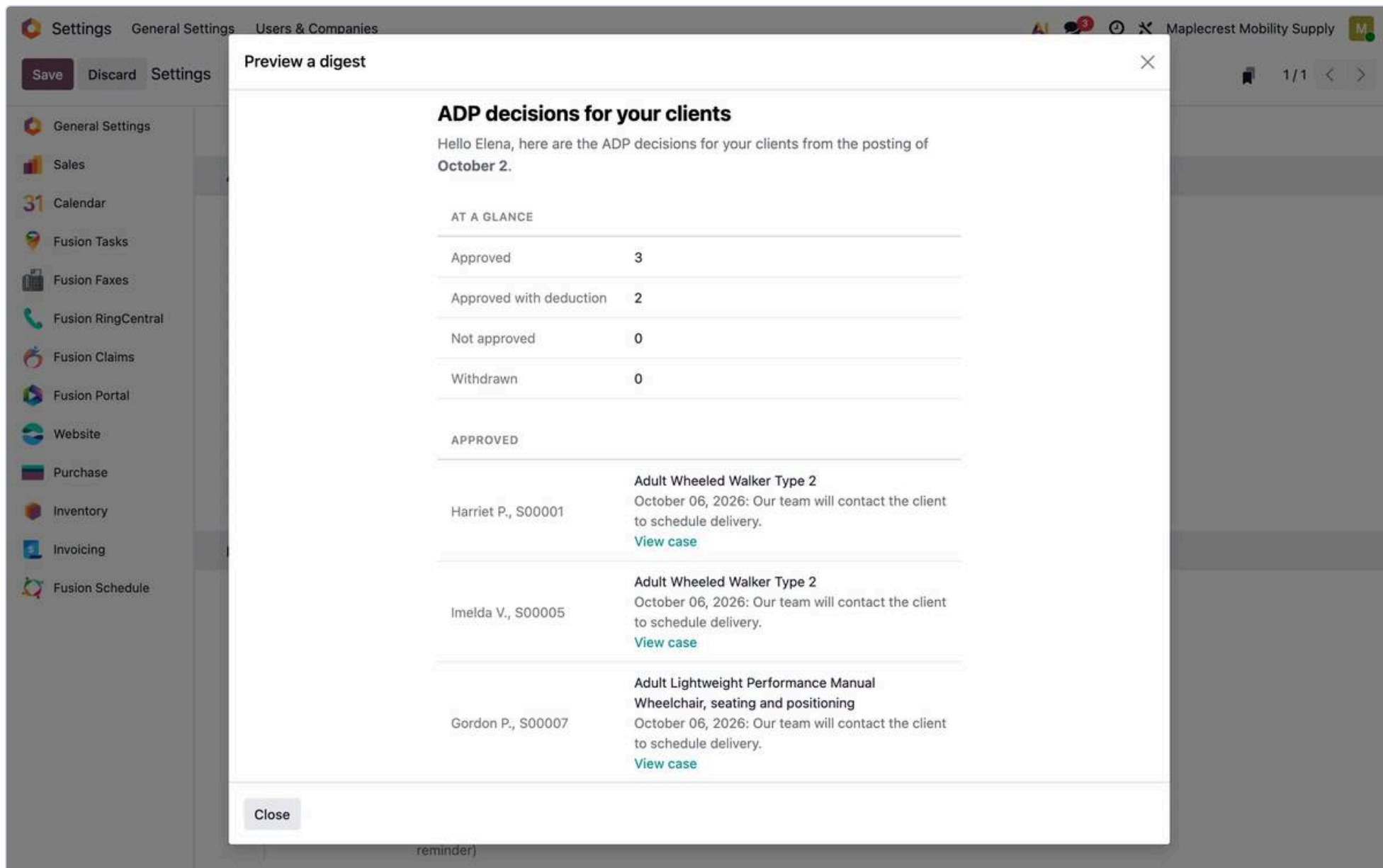
System

What happens

When a case is approved, the system emails the client, with the rep and office copied, listing the approved devices with the Approved Items Report PDF attached.

What it saves you

Clients and reps hear about approvals without a phone call from the office.



3 Step 3.6 of 24

Send each therapist one summary

System Therapist

What happens

A therapist's approvals, deductions and other decisions are gathered into one summary email on Monday mornings instead of one email per case. A therapist can ask for one email per case, and staff can preview a summary first.

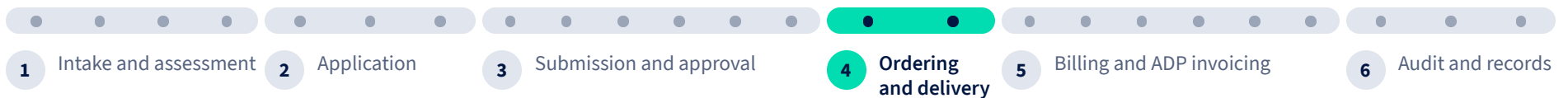
What it saves you

Therapists get one weekly email instead of a stream of separate ones.

Ordering and delivery

Equipment can be ordered before or after approval, and delivery is scheduled and proven on the case.

4.1	Order the equipment	Office	25
Every purchase order shows which client it is for.			
4.2	Deliver and keep the proof of delivery	Office Technician	26
A case cannot move to billing without its proof of delivery on file.			



New

S00002 - Walter Brisebois

P00001

Vendor Bills

1

Receipt

1

Sale

1

Sale Orders

1

1 / 1

<

>

Upload Bill

Send PO

Print

Cancel

Match Sale Order

RFQ

RFQ Sent

Purchase Order

Send message

Log note

Activity

Purchase Order

☆ P00001

Vendor ?

Northbridge Medical Distribution

Vendor Reference ?

Marked For ?

Walter Brisebois

Currency

CAD

Sale Orders ?

S00002 - Walter Brisebois

Confirmation Date

Oct 6, 12:27 AM

Expected Arrival ?

Oct 6, 12:27 AM

Deliver To ?

Maplecrest Mobility Supply: Receipts

Arrival ?

Oct 6, 12:27 AM

Products

Other Information

Product	Quantity	Received	Billed	Unit Price	Taxes	
Quickie QS5 X Manual Wheelchair	1.00	1.00	1.00	1,259.50	13% HST	\$ 1,259.50
Vicair O2 XXTRA Bariatric Seat Cu...	1.00	1.00	1.00	560.00	13% HST	\$ 560.00

Add a product

Add a section

Add a note

Catalog

Define your terms and conditions ...

Untaxed Amount:

\$ 1,819.50

HST 13%:

\$ 236.54

Total:

\$ 2,056.04

Today

OdooBot 12:27 AM

No → Yes (Acknowledged)

RFQ → Purchase Order (Status)

OdooBot 12:27 AM

The received quantity has been updated.

Vicair O2 XXTRA Bariatric Seat Cushion:

Received Quantity: 0.0 -> 1.0

OdooBot 12:27 AM

The received quantity has been updated.

Quickie QS5 X Manual Wheelchair:

Received Quantity: 0.0 -> 1.0

Morgan Ashby 12:27 AM

Purchase Order created



4 Step 4.1 of 24

Order the equipment

Office

What happens

From the quotation, staff assign lines to vendors and create purchase orders grouped by vendor, each linked to the client's order. This works before or after approval.

What it saves you

Every purchase order shows which client it is for.

Schedule Delivery Task

En Route Start Task Reschedule Cancel Calculate Travel Scheduled En Route In Progress Completed

Task Title ?
Deliver wheelchair to Desmond Okafor

New

✓ All slots available (9:00 AM - 6:00 PM)

First task of the day -- travel calculated from start location.

ASSIGNMENT		SCHEDULE	
Technician ?	Kai Thorvaldsen	Scheduled Date	Oct 6
Additional Technicians ?		Start Time	9:00 AM
Task Type	Delivery	Duration ?	01:00
Priority	☆☆	End Time	10:00 AM
Related SO ?	S00004 - Desmond Okafor		
Related PO ?			

CLIENT		LOCATION	
Client Name ?	Desmond Okafor	In Store ?	☐
Client Phone	416-555-0124 SMS	Task Address ?	Desmond Okafor
		Street	207 Brindlemoor Court

Save Discard

4 Step 4.2 of 24

Deliver and keep the proof of delivery

Office Technician

What happens

Staff assign the delivery technicians and a date, with an early delivery option. Ready to Bill needs the approval, completed device verification, the delivery date and the signed proof of delivery as a PDF.

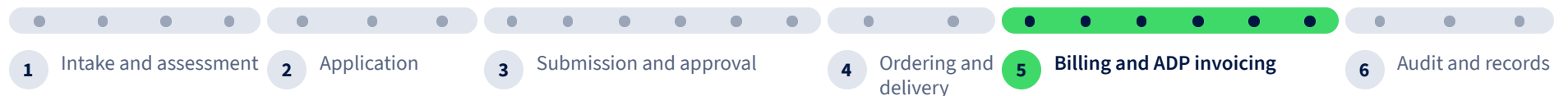
What it saves you

A case cannot move to billing without its proof of delivery on file.

Billing and ADP invoicing

The client's portion and ADP's portion go on separate invoices, and supplier bills and prices are checked before ADP is billed.

5.1	Apply the deduction The deduction is entered once, on the device, and the invoices are built from it.	Office System	28
5.2	Invoice the client's portion The client's share is billed when it suits you, without waiting for ADP.	Office	29
5.3	Match supplier bills to the case The supplier bill behind each device is already linked when billing or an audit needs it.	System Office	30
5.4	Create the ADP invoice ADP is not billed for a case that is missing the paperwork behind it.	Office System	31
5.5	Export the claim file for ADP No hand-built billing file, and a price mismatch is caught before ADP sees it.	Office System	32
5.6	Follow up on corrections and payment A claim that needs correcting stays on someone's list until it is fixed.	Office System	33



Fusion Claims
Dashboard
All Orders
ADP
ODSP
MOD
Other Fundings
Assessments
Vendor Bill Evidence
ADP Audits
+

New
S00002 - ...

Purchase 1
Invoices 2
Purchase 1
Proof of Delivery 1
Client Invoice 1
ADP Invoice 1
Vendor Bills 1
More

1 / 1

Send
Re-match Vendor Bills
Create PO
Print
Confirm
Preview
Cancel
Send Fax
Quotation
Send message
Log note
Activity

Generate Auto Quote

ADP PORTION BREAKDOWN

Total ADP Portion ? \$ 2,367.50
Total Client Portion ? \$ 922.50

ORDER INFORMATION

✓	Description	Device Type	Build	S/N	Qty	Unit \$	Ded.	
☒	Quickie QS5 X Manual Wheelchair	Adult Lightweight Pe...		QX5-DEMO...	1.00	2,290.00	No Dedu...	0.00
☒	Vicair O2 XXTRA Bariatric Seat Cushion	Seat Cushion		VIC-DEMO-...	1.00	1,000.00	Amount	100.00

Calculation Rules:

- REG Client: ADP Portion = 75%, Client Portion = 25%
- ODS/OWP/ACS/LTC/SEN/CCA: ADP Portion = 100%, Client Portion = 0%
- PCT Deduction: ADP pays X% of their normal portion
- AMT Deduction: Fixed \$ amount deducted from ADP portion

Recalculate Portions

Case Closed

Date: October 06, 2026
Audit Trail Verified:

- ✓ Signed Pages 11 & 12
- ✓ Final Application
- ✓ Proof of Delivery
- ✓ Vendor Bills: 1 (BILL/2026/10/0001)

Notes: Delivered, billed and evidenced. Closing after the export was saved.
Closed by Morgan Ashby

Morgan Ashby 12:36 AM

Case Closed email sent

- To: walter.brisebois@example.com
- CC: riley.castellano@example.com

Morgan Ashby 12:36 AM

Subject: Case Closed - Walter Brisebois - S00002

Morgan Ashby 12:33 AM

Marked as Billed

Billing Date: October 06, 2026
Posted Invoices: INV/2026/00002, INV/2026/00001
Total Billed: \$3,290.00

Morgan Ashby 12:33 AM

Ready to Bill → Billed to ADP (ADP Application Status)
None → 10/06/2026 (Billing Date)

Morgan Ashby 12:32 AM

ADP Invoice Created



5 Step 5.1 of 24

Apply the deduction

Office System

What happens

When ADP approves a device with a deduction, staff choose Percentage or Amount and enter the value. The ADP and client portions are recalculated from the client type and the device's ADP price.

What it saves you

The deduction is entered once, on the device, and the invoices are built from it.

New

S00002 - Walter Brisebois

INV/2026/00001 (S00002)

Sale Orders

1

1 / 1

<

>

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Send Fax

Draft

Posted

Send message

Log note

Activity

Customer Invoice

Client Portion (25%)

INV/2026/00001

Customer

Walter Brisebois

88 Fernhollow Crescent

Toronto M9W 0B2

Canada

Invoice Date

Oct 6

Due Date

Oct 6

Currency

CAD

Invoice Type ?

ADP Client Portion

Authorizer ?

Elena Marchetti

Client Type ?

REG

PROOF OF PAYMENT

The client's proof of paying this invoice: cheque scan, e-transfer confirmation or card slip. Proof of Payment is the same file as on the sales order, so changing it here changes it there. A client paying in instalments has one proof per payment: add the others under More Payment Proofs. Every file goes into the ADP evidence pack.

Proof of Payment ?

Upload your file

More Payment Proofs ?

More Payment Proofs

Invoice Lines

Other Info

ADP Case Details

ADP Summary

Product	S/N	Quantity	Price	Taxes	ADP	
ADP Manual Wheelchair						
Quickie QS5 X Manual Wheelchair	QX5-DEMO-...	1.00	572.50	0% Int	\$ 1,717.50	\$ 572.
Vicair O2 XXTRA Bariatric Seat Cu...	VIC-DEMO-0...	1.00	350.00	0% Int	\$ 650.00	\$ 350.

Today

M Morgan Ashby 12:28 AM

Invoice validated

No → Yes (Reviewed)

None → INV/2026/00001 (Number)

None → INV/2026/00001 (Payment Reference)

Draft → Posted (Status)

M Morgan Ashby 12:28 AM

Invoice Created



5 Step 5.2 of 24

Invoice the client's portion

Office

What happens

For regular (REG) clients, the client invoice holds only the client's portion and in most cases can be created before approval. Devices ADP does not fund or did not approve can go fully on the client invoice.

What it saves you

The client's share is billed when it suits you, without waiting for ADP.

New

S00002 - ...

Purchase1

Invoices2

Purchase1

Proof of Delivery1

Client Invoice1

ADP Invoice1

Vendor Bills1

More

1 / 1

<

>

Send

Re-match Vendor Bills

Create PO

Print

Confirm

Preview

Cancel

Send Fax

Quotation

Send message

Log note

Activity

Generate Auto Quote

Application Submitted

Application Approved

Ready to Bill

Billed to ADP

Case Closed

S00002

Customer

Walter Brisebois

88 Fernhollow Crescent

Toronto M9W 0B2

Canada

Salesperson

Riley Castellano

Expiration

Nov 5

Payment Terms

Immediate

Sale Type

ADP

Authorizer

Elena Marchetti

Client Type

REG

Delivery Photos

ADP Case Details

ADP Documents

Delivery

ADP Summary

ADP Order Trail

Vendor Bills

Vendor Bills (Audit Trail)

Complete

2 of 2 lines evidenced

Re-match Vendor Bills

Override Billing Gate

Purchase OrdersP00001

Vendor BillsBILL/2026/10/0001 (NB-20417)

Product	ADP Code	Audit Cat...	Part of Ve...	Evidenced	Evidence...
Quickie Q...	WM0002190 - Quickie QS5 X (\$2290.00)	Mobility B...	BILL/2026...		BILL/2026...
Vicair O2 ...	SE0002131 - Vicair O2 XXTRA Bariatric 500 Kg withInc...	Seat Cush...	BILL/2026...		BILL/2026...

Planned Activities

Today: "Finish assessment quotation" for Riley Castellano

Review the equipment model: none was selected on the assessment.

Mark Done Edit Cancel

Due in 7 days: "Deliver ADP order S00002 for Oct 16 billing" for Riley Castellano

Complete delivery by Tuesday to meet the Wednesday 6 PM submission deadline for the October 16, 2026 ADP posting.

Mark Done Edit Cancel

Today

Riley Castellano 12:38 AM

Quotation reviewed. Sending to the client remains optional.

Morgan Ashby 12:36 AM

Billed to ADP → Case Closed (ADP Application Status)

Morgan Ashby 12:36 AM

Case Closed

Date: October 06, 2026

Audit Trail Verified:

Signed Pages 11 & 12

Final Application

Proof of Delivery

Vendor Bills: 1 (BILL/2026/10/0001)

Notes: Delivered, billed and evidenced. Closing after the export was saved.

Closed by Morgan Ashby

Morgan Ashby 12:36 AM

Case Closed email sent

5

Step 5.3 of 24

Match supplier bills to the case

System

Office

What happens

The system matches each device to posted supplier bills using serial numbers, purchase order links and other rules. Strong matches are confirmed on their own, and uncertain ones wait for a person to confirm or reject.

What it saves you

The supplier bill behind each device is already linked when billing or an audit needs it.

New

S00002 - Walter Brisebois

INV/2026/00002 (S00002)

Sale Orders

1

1 / 1

<

>

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Export ADP

Send Fax

Posted

Submitted

Send message

Log note

Activity

Customer Invoice

ADP Portion (75%)

INV/2026/00002

Customer

Walter Brisebois

88 Fernhollow Crescent

Toronto M9W 0B2

Canada

Invoice Date

Oct 6

Due Date

Oct 6

Currency

CAD

Invoice Type

ADP

Authorizer

Elena Marchetti

Client Type

REG

Invoice Lines

Other Info

ADP Case Details

ADP Summary

Product	S/N	Quantity	Price	Taxes	ADP
ADP Manual Wheelchair					
Quickie QS5 X Manual Wheelchair	QX5-DEMO-...	1.00	1,717.50	0% Int	\$ 1,717.50
Vicair O2 XXTRA Bariatric Seat Cu...	VIC-DEMO-0...	1.00	650.00	0% Int	\$ 650.00

Terms and Conditions

Untaxed Amount:

\$ 2,367.50

Taxes:

\$ 0.00

Total:

\$ 2,367.50

Amount Due:

\$ 2,367.50

Today

Morgan Ashby 12:33 AM

Waiting → Submitted (ADP Billing Status)

Morgan Ashby 12:32 AM

Invoice validated

No → Yes (Reviewed)

None → INV/2026/00002 (Number)

None → INV/2026/00002 (Payment Reference)

Draft → Posted (Status)

Morgan Ashby 12:32 AM

Invoice Created



5 Step 5.4 of 24

Create the ADP invoice

Office System

What happens

The ADP invoice holds only ADP's portion. It can be created once the proof of delivery, device verification, an approved device and supplier bill evidence are in place, or a manager records an override.

What it saves you

ADP is not billed for a case that is missing the paperwork behind it.

Fusion Claims

Dashboard

All Orders

ADP

ODSP

MOD

Other Fundings

Assessments

Vendor Bill Evidence

ADP Audits

+

Maplecrest Mobility Supply

New

Invoices

INV/2026/00005 (S00007)

Sale Orders

1

2 / 6

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Export ADP

Send Fax

Posted

Submitted

Send message

Log note

Activity

Customer Invoice

ADP Portion (75%)

Today

INV/2026/00005

Customer: Gordon Pyke

31 Tamarack Hollow

Burlington L7L 9M

Canada

Invoice Date: Oct 6

Morgan Ashby 12:55 AM

Waiting → Submitted (ADP Billing Status)

Morgan Ashby 12:55 AM

Invoice Created

Export ADP Claim

EXPORT CONFIGURATION

Vendor Code: DEMO99

Export Date: Oct 6

INVOICES TO EXPORT

INV/2026/00005 (S00007)

Export

Close

Invoice Lines

Other Info

Product

ADP Manual Wheelchair

Quickie QS5 X Manual Wheelchair

QX5-DEMO-...

1.00

1,717.50

0% Int

\$ 1,717.50

\$ 572.

Terms and Conditions

Untaxed Amount: \$ 1,717.50

Taxes: \$ 0.00

Total: \$ 1,717.50

Amount Due: \$ 1,717.50

Total ADP Portion: \$ 1,717.50



5 Step 5.5 of 24

Export the claim file for ADP

Office System

What happens

Export ADP Claims builds the .txt claim file from the ADP invoices, one row per unit, and checks every portion against the ADP device price list. A mismatch stops the export. Your staff then upload the file on the ADP portal.

What it saves you

No hand-built billing file, and a price mismatch is caught before ADP sees it.

Fusion Claims

Dashboard

All Orders

ADP

ODSP

MOD

Other Fundings

Assessments

Vendor Bill Evidence

ADP Audits

+

AI

3

🕒

🔗

Maplecrest Mobility Supply

M

New

S00002 - Walter Brisebois

INV/2026/00002 (S00002)

⚙️

📝

Sale Orders

1

📖

1 / 1

<

>

Send

Print

Pay

Preview

Credit Note

Reset to Draft

📄 Export ADP

📠 Send Fax

Posted

Submitted

Send message

Log note

Activity

🔍

🔗

👤 2

88 Fernhollow Crescent

Toronto M9W 0B2

Canada

Due Date

Oct 6

Currency

CAD

Invoice Type ?

ADP

Authorizer ?

Elena Marchetti

Client Type ?

REG

Invoice Lines

Other Info

ADP Case Details

ADP Summary

CLAIM INFORMATION

Claim Number ?

0000417002

Client Reference 1 ?

WAIS

Client Reference 2 ?

6647

DATES

ADP Delivery Date ?

Oct 6

Service Start Date ?

Service End Date ?

EXPORT STATUS

ADP Exported ?

👍

ADP Export Date

Oct 6, 12:34 AM

Export Count ?

1

ADP BILLING STATUS

ADP Billing Status ?

Submitted

Today

M Morgan Ashby 12:33 AM

Waiting → Submitted (ADP Billing Status)

M Morgan Ashby 12:32 AM

Invoice validated

No → Yes (Reviewed)

None → INV/2026/00002 (Number)

None → INV/2026/00002 (Payment Reference)

Draft → Posted (Status)

M Morgan Ashby 12:32 AM

Invoice Created



5 Step 5.6 of 24

Follow up on corrections and payment

Office System

What happens

Each ADP invoice shows its billing status: Waiting, Submitted, Need Correction or Payment Issued. Correction reminders go to the people you choose, and the status changes to Payment Issued once the invoice is paid.

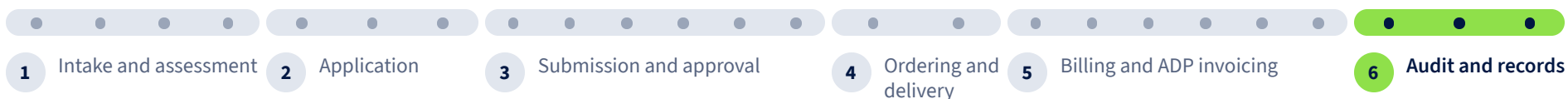
What it saves you

A claim that needs correcting stays on someone's list until it is fixed.

Audit and records

Each case keeps its audit trail as it moves, every claim file stays on record, and closing a case checks its paperwork.

6.1	Keep the audit trail on the case An audit request starts from evidence already on the cases, not a search through folders.	System Office	35
6.2	Keep every claim file You can reopen exactly what was sent to ADP for any posting period.	System	36
6.3	Close the case Finished cases leave the work queues, and any gap at closing is on record.	Office System	37



Fusion Claims

Dashboard
All Orders
ADP
ODSP
MOD
Other Fundings
Assessments
Vendor Bill Evidence
ADP Audits
+

Maplecrest Mobility Supply

New

Claim Submission Files
DEMO99_2026-10-06.txt

Invoices
1

1 / 1

Download File

DEMO99_2026-10-06.txt

EXPORT DETAILS

Export Date	Oct 6, 12:34 AM
Posting Period ?	Oct 16
Posting Period Label	Posting Schedule - 16/10/2026
ADP Posting Period	Posting 2026-10-16
Claimed ?	\$ 2,367.50
Settlement	0 paid, 0 held, 0 deleted, 1 unanswered
Payment Date ?	Oct 26
Vendor Code	DEMO99
Lines Exported	2

FILE

Export File ?	DEMO99_2026-10-06.txt
Exported By	Morgan Ashby

File Preview

Exported Invoices

DEMO99,0000417002,6647,INV/2026/00002,06102026,06102026,,,WM0002190,QX5-DEMO-0001,,1,2290.00,1717.50,572.50,REG
DEMO99,0000417002,6647,INV/2026/00002,06102026,06102026,,,SE0002131,VIC-DEMO-0001,,1,1000.00,650.00,350.00,REG



6 Step 6.2 of 24

Keep every claim file

System

What happens

Each export is saved under Claim Submission Files with the file, a text preview, who exported it and when, the posting period and the invoices it contains.

What it saves you

You can reopen exactly what was sent to ADP for any posting period.

Fusion Claims

Dashboard

All Orders

ADP

ODSP

MOD

Other Fundings

Assessments

Vendor Bill Evidence

ADP Audits

+

Maplecrest Mobility Supply

New

S00007 - ...

Purchase 2

Invoices 2

Purchase 2

Proof of Delivery 1

Client Invoice 1

ADP Invoice 1

Vendor Bills 2

More

1 / 1

Send

Re-match Vendor Bills

Close Case

Create PO

Print

Confirm

Preview

Cancel

Quotation

Send message

Log note

Activity

Send Fax

Generate A

S00007

Customer Gordon Pyke

31 Tamarack Ho

Burlington L7L 9

Canada

Salesperson Riley Caste

Order Lines

Other Info

Product

ADP Manual Wheelchair

Quickie QS5 X Manual Whe

Vicair O2 XXTRA Bariatric S

Add a product

Add a secti

Terms and conditions...

Close Case - Audit Trail Verification

Audit Trail Verification

Before closing this case, please verify all required documents are uploaded and vendor bills are linked for audit purposes.

All Items Verified

All required documents and vendor bills are present.

DOCUMENT CHECKLIST

Signed Pages 11 & 12

Final Application

Proof of Delivery

Vendor Bills (2 linked)

2 of 2 lines requiring a vendor bill are evidenced (100%).

CLOSING NOTES (OPTIONAL)

Delivered, billed and evidenced. Closing after the export was saved.

Close Case

Cancel

Untaxed Amount: \$ 0.00

Taxes: \$ 0.00

Total: \$ 3,290.00

Total ADP Portion: \$ 1,717.50

Created By: Morgan Ashby

Date: October 06, 2026

ADP Portion (75%): \$ 1,717.50



6 Step 6.3 of 24

Close the case

Office System

What happens

Before closing, the system checks the signed pages, final application, proof of delivery and supplier bills. Closing with something missing needs a written reason, which is kept. Billed cases close on their own 30 days after billing.

What it saves you

Finished cases leave the work queues, and any gap at closing is on record.

Funding programs beyond ADP

ADP is not the only payer your office deals with. Fusion Claims gives ODSP and March of Dimes their own workflows, tracks WSIB, insurance, Muscular Dystrophy Canada and hardship cases with their own statuses, and keeps program forms in the therapist's portal.

ODSP, SA Mobility and Ontario Works

Three ODSP paths, each with its own statuses, forms and payment order.

Staff choose the ODSP division on the case: ODSP Standard, SA Mobility or Ontario Works. Each one has its own statuses, forms and payment order.

Private insurance

The client submits, or you bill the insurer directly.

The Insurance Case records the insurer, policy, claim, pre-authorization amount and expiry, with an optional home assessment. There are two routes.

ACSD

ADP cases with the ACS client type, on the ADP workflow.

ACSD clients are ADP cases with the ACS client type, so they follow the ADP workflow, documents and claim file. The ACSD Cases list shows them together.

March of Dimes home and vehicle modifications

Assessment, drawings, funding agreement, PCA and production on one case.

March of Dimes Canada cases for the Home and Vehicle Modification Program follow their own path, from the assessment and drawings to the funding agreement, the PCA and production.

Muscular Dystrophy Canada

Enrolment, the OT letter, the MDC purchase order and payment.

The Muscular Dystrophy Case tracks enrolment, the MDC client ID, who submits, and the MDC purchase order with its number, date, amount and document.

Program forms in the therapist's portal

Forms and links for IFHP, VAC, Blue Cross, Easter Seals and more.

Therapists signed in to their portal have a library of program forms and links, kept with a title, type and version.

WSIB

A WSIB case form with the claim, adjudicator, Form 7 date and approval.

WSIB cases have their own case form and statuses.

Hardship funding

One case type for any hardship funder, from pre-assessment to payment.

One Hardship Funding Case covers any hardship funder: the funder, who submits, the eligibility interview, the approval date and amount, the client portion and how the approval arrived.

Direct and private, other payers and rentals

Sale types on the same order, without an ADP claim.

Direct and private sales, other payers and rentals are sale types on the same order, without a government application or ADP claim file.

Questions a manager will ask

Does it send claims to ADP for us?

No. Your staff submit on the ADP portal. Fusion Claims checks the files first, then records what was submitted, when, and what ADP said.

Can therapists send documents without email?

Yes. Each therapist signs in to their own portal, sees only their own cases and uploads documents to the case.

Does it handle funding other than ADP?

Yes. ODSP and March of Dimes have their own workflows, and WSIB, insurance, Muscular Dystrophy Canada and hardship cases are tracked with their own statuses.

Who do we call when something goes wrong?

The team that built your system: business hours for everyone, plus an emergency line for hosted clients.

What if ADP approves only part of a claim?

Staff mark each device approved or not and enter any deduction. The ADP and client portions are recalculated, and devices that were not approved move to the client.

How does it help with an ADP audit?

The audit workbench imports the audit appendix, checks the evidence on each case line by line and builds the evidence pack. It prepares the evidence; the audit outcome is ADP's decision.

Where is our data kept?

On our own servers in Ontario.

Is it an off-the-shelf package?

No. Every project is custom-coded after an initial meeting with your team.

Next steps

- 1

Book a call

Scan the code or go to nexasystems.ca/appointment/1 to book a one-hour consultation.
- 2

Bring your process

Tell us how cases come in, who handles them and how you bill today.
- 3

See it on a demo system

We walk through the steps in this guide on the demo company, with your ADP process in mind.

Or call 905-792-0000 during business hours.



nexasystems.ca/appointment/1

Notes for the first meeting



See it on a demo system

Book a call

nexasystems.ca/appointment/1

Phone

905-792-0000

Web

nexasystems.ca

Location

Toronto, Ontario



Nexa Systems Inc. builds custom ERP systems and business apps on Odoo and hosts them on its own servers in Ontario. Screens in this guide show invented data from a demo company.