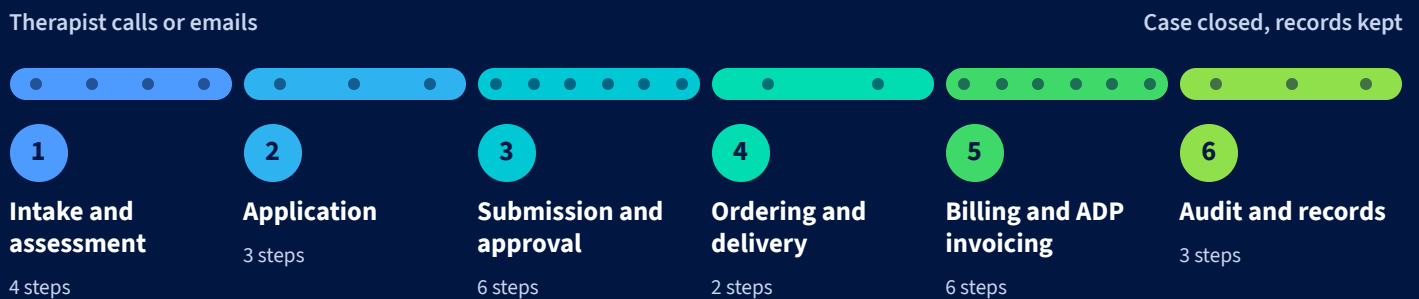




ADP claims, from assessment to audit

How Fusion Claims runs an Ontario ADP case in Odoo, step by step, with the screen for each step.



The whole journey on one page

Every step your office takes on an ADP claim in Fusion Claims, shown on the screen where it happens. Read the route below in a minute, then open any phase to see how each step works.

1 Intake and assessment

- 1.1 **Book the assessment**
Office, Sales rep, Therapist
- 1.2 **Run the express assessment**
Sales rep
- 1.3 **Review the quotation built from the assessment**
System, Sales rep
- 1.4 **Collect the signed pages**
Client, Sales rep

2 Application

- 2.1 **Receive documents through the therapist portal**
Therapist, Office
- 2.2 **Follow up on a late application**
System
- 2.3 **Process the application in the office**
Office

3 Submission and approval

- 3.1 **Check the files before submission**
Office, System
- 3.2 **Record the submission and ADP's response**
Office
- 3.3 **Record the approved devices**
Office, System
- 3.4 **Read the ADP status report PDF (optional)** Beta
Office, System
- 3.5 **Tell the client and rep about the approval**
System
- 3.6 **Send each therapist one summary**
System, Therapist

4 Ordering and delivery

- 4.1 **Order the equipment**
Office
- 4.2 **Deliver and keep the proof of delivery**
Office, Technician

5 Billing and ADP invoicing

- 5.1 **Apply the deduction**
Office, System
- 5.2 **Invoice the client's portion**
Office
- 5.3 **Match supplier bills to the case**
System, Office
- 5.4 **Create the ADP invoice**
Office, System
- 5.5 **Export the claim file for ADP**
Office, System
- 5.6 **Follow up on corrections and payment**
Office, System

6 Audit and records

- 6.1 **Keep the audit trail on the case**
System, Office
- 6.2 **Keep every claim file**
System
- 6.3 **Close the case**
Office, System

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

1 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. Who called?

OCCUPATIONAL THERAPIST / CONTACT

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

2. Who are we meeting?

Gordon Pyke

905-555-0128

3. Where?

31 Tamarack Hollow, Burlington, ON L7L 9M3

1.1 Office Sales rep
Therapist

Book the assessment

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.

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

1

Intake and assessment, continued

Client Information

FIRST NAME *

MIDDLE NAME

LAST NAME *

CLIENT TYPE *

HEALTH CARD NUMBER *

VE

STREET ADDRESS *

UNIT/APT/SUIT

1.2 Sales rep

Run the express assessment

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.

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

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

1.3 System Sales rep

Review the quotation built from the assessment

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.

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

1

Intake and assessment, continued

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****1.4**

Client

Sales rep

Collect the signed pages

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.

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

2 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.

Documents

Sales Rep: Riley Castellano

Funding Status: Waiting for Application

Full ADP Application

Choose File gordon_application_rev2.pdf

Seat width corrected

Upload

Original ADP Application
v1 - 10/06/2026

2.1 Therapist Office

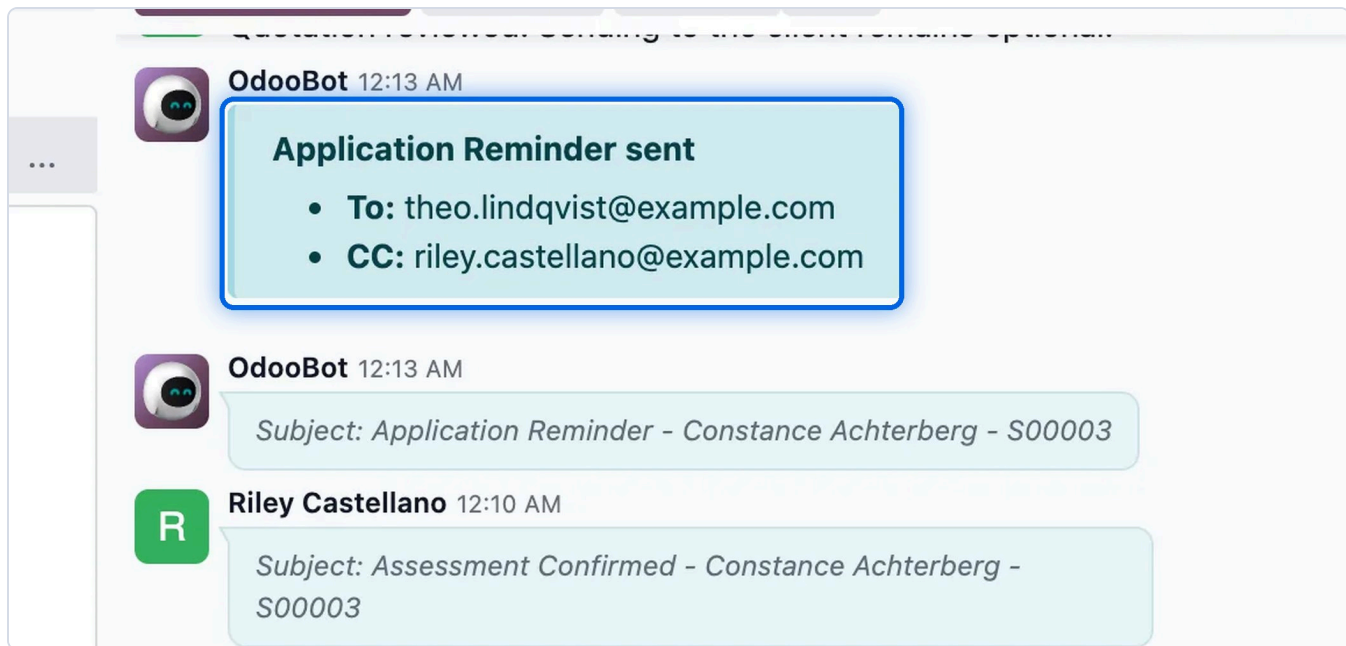
Receive documents through the therapist portal

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.

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

2

Application, continued



2.2 System

Follow up on a late application

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.

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

Application Received

Upload Required Documents

Please upload the ADP application documents received from the client, then tell the system how pages 11 & 12 are 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

2.3 Office

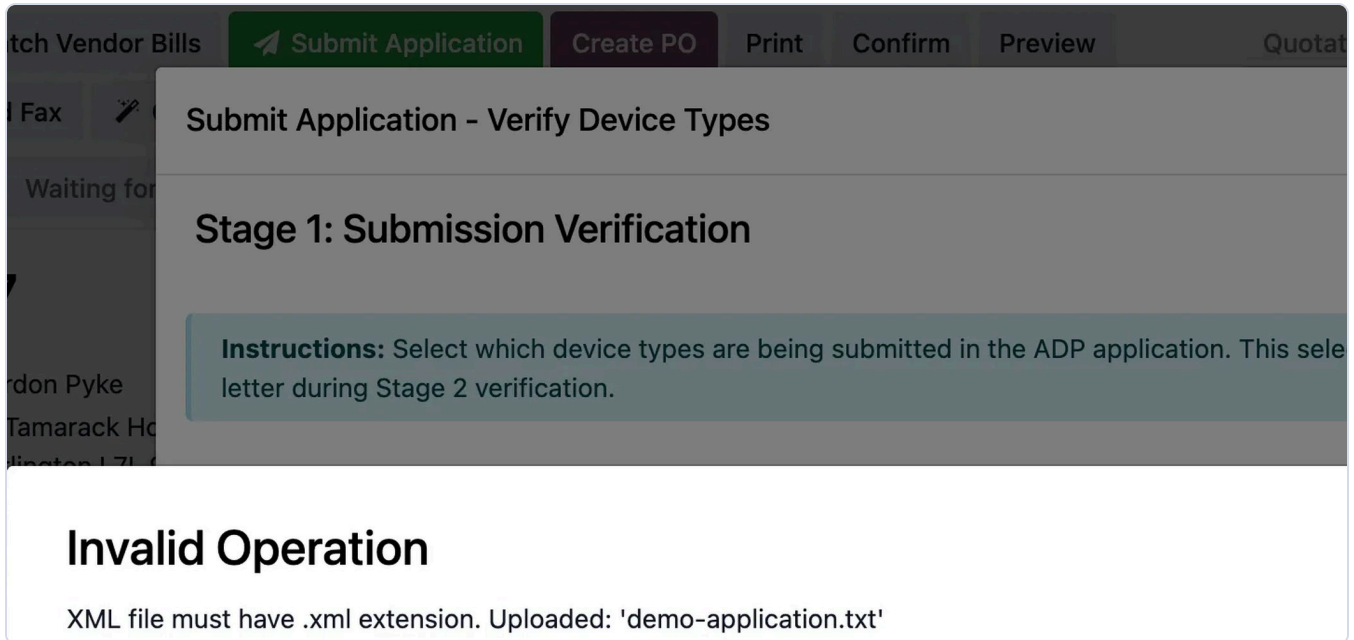
Process the application in the office

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.

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

3 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 Office System

Check the files before submission

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.

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

3

Submission and approval, continued

M

Morgan Ashby 12:53 AM

Ready for Submission → **Application Submitted** (*ADP Application Status*)

None → **10/06/2026** (*Claim Submission Date*)

M

Morgan Ashby 12:53 AM

➤ **Application Submitted**

Date: October 06, 2026

Device Types Submitted:

- Adult Lightweight Performance Manual Wheelchair

3.2 Office

Record the submission and ADP's response

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.

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

3

Submission and approval, continued

DEVICES FOR APPROVAL

A...	Device Ty...	Product	ADP Code	S/N	Qty	Unit \$	Deduction
☒	Adult Ligh...	Quickie Q...	WM0002...		1.00	2,290.00	No Deduc...
☐	Seat Cush...	Vicair O2 ...	SE0002131		1.00	1,000.00	No Deduc...

✖ Unapproved Items

Devices marked as NOT approved will be billed to client at 100% and removed from ADP invoice.

3.3 Office System

Record the approved devices

Staff enter the claim number and approval date, mark each device approved or not, enter any deduction and can attach the approval letter. The ADP and client portions are recalculated, and devices that were not approved move to the client.

Saves you: Partial approvals and deductions reach the portions and invoices without working them out by hand.

3 Submission and approval, continued

New

ADP Statements
ADP Statement

Lines
0

Agreed
0

Needs
0

Read Statement

Upload

ADP Statement

STATEMENT		SECTION TOTALS	
Statement PDF	demo_status_report.p	Total Invoice Payment	\$ 0.00
Vendor Registration Number		Total Credit Note Amount	\$ 0.00
Date Run From		Total Recovery	\$ 0.00

3.4 Office System Beta

Read the ADP status report PDF (optional)

Optionally, upload the Invoice and Application Status Reports PDF downloaded from ADP. The system reads its rows, checks your vendor registration and matches them to cases, an optional AI second read flags any differences, and a Claims Administrator applies the matched results.

Saves you: Approvals on the report reach their cases without keying each one in.

3 Submission and approval, continued

Send & Close

Cancel

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

3.5 System

Tell the client and rep about the approval

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.

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

ADP decisions for your clients

Hello Elena, here are the ADP decisions for your clients from the posting of **October 2**.

AT A GLANCE

Approved	3
Approved with deduction	2
Not approved	0

3.6 System Therapist

Send each therapist one summary

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.

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

4 Ordering and delivery

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

Upload BillSend POSend POPrintCancelMatch Sale Order

RFQRFQ SentP

Purchase Order

☆

P00001

Vendor ?

Northbridge Medical Distribution

Sale Orders ?

S00002 - Walter Brisebois X

Vendor Reference ?

Confirmation Date

Oct 6, 12:27 AM

Marked For ?

Walter Brisebois X

Expected Arrival ?

Oct 6, 12:27 AM

Currency

CAD

Deliver To ?

Maplecrest Mobility Supply:

Arrival ?

Oct 6, 12:27 AM

Products

Other Information

4.1 Office

Order the equipment

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.

Saves you: Every purchase order shows which client it is for.

4 Ordering and delivery, continued

Schedule Delivery Task

En Route

Start Task

Reschedule

Cancel

Calculate Travel

Scheduled

En Route

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

4.2 Office Technician

Deliver and keep the proof of delivery

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.

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

5

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.

ADP PORTION BREAKDOWN				ORDER INFORMATION			
Total ADP Portion ?		\$ 2,367.50					
Total Client Portion ?		\$ 922.50					
✓	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...
✓	Vicair O2 XXTRA Bariatric Seat Cushion	Seat Cushion		VIC-DEMO-...	1.00	1,000.00	Amount

5.1 Office System

Apply the deduction

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.

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

Send Print Pay Preview Credit Note Reset to Draft Send Fax

Draft Posted

Customer Invoice

Client Portion (25%)

INV/2026/00001

Customer
Walter Brisebois
88 Fernhollow Crescent
Brampton L6P 9B2
Canada

Invoice Date
Oct 6
Due Date
Oct 6
Currency
CAD
Invoice Type ?
ADP Client Portion
Authorizer ?
Elena Marchetti
Client Type ?
REG

5.2 Office

Invoice the client's portion

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.

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

5 Billing and ADP invoicing, continued

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 Orders ? P00001 X

Vendor Bills ? BILL/2026/10/0001 (NB-20417) X

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...

5.3 System Office

Match supplier bills to the case

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.

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

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Export ADP

Send Fax

Posted

Submitted

Customer Invoice

ADP Portion (75%)

INV/2026/00002

Customer [Walter Brisebois](#)
88 Fernhollow Crescent
Brampton L6P 9B2
Canada

Invoice Date

 Oct 6

Due Date

 Oct 6

Currency

 CAD

Invoice Type ?

 ADP

Authorizer ?

 Elena Marchetti

Client Type ?

 REG

5.4 Office System

Create the ADP invoice

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.

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

5 Billing and ADP invoicing, continued

Export ADP Claim

EXPORT CONFIGURATION

Vendor Code DEMO99

Export Date Oct 6

INVOICES TO EXPORT

INV/2026/00005 (S00007)

 **Export**

Close

5.5 Office System

Export the claim file for ADP

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.

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

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 ? 

5.6 Office System

Follow up on corrections and payment

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.

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

6

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.

 **Case Lock**
When locked, all ADP fields become read-only ☐

 Workflow Checklist	 Documents Checklist
☒ Assessment Dates Set	☒ Final Application Uploaded
☒ Authorization Date Set	☒ XML File Uploaded
☒ Original Application Uploaded	☒ Approval Letter Uploaded
☒ Signed Pages 11 & 12 Uploaded	☒ Proof of Delivery Uploaded
☒ Submission Verified	☒ Device Verification Complete

6.1 [System](#) [Office](#)

Keep the audit trail on the case

The ADP Order Trail on each case is a checklist of assessment dates, authorization, application, signed pages, XML, approval, proof of delivery, supplier bills and posted invoices. For an ADP audit, the audit workbench imports the appendix, checks the evidence line by line and builds the evidence pack.

Saves you: An audit request starts from evidence already on the cases, not a search through folders.

New
Claim Submission Files
DEMO99_2026-10-06.txt
Invoice 1

Download File

DEMO99_2026-10-06.txt

EXPORT DETAILS

Export Date	Oct 6, 12:34 AM	FILE
Posting Period ?	Oct 16	Export
Posting Period Label	Posting Schedule - 16/10/2026	Export

6.2 System

Keep every claim file

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.

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

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%).			

6.3 Office System

Close the case

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.

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

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.



Submission files

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



Ready to bill

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



Supplier bill matching

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



Portions and deductions

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



Closing the case

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

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.

March of Dimes home and vehicle modifications

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

WSIB

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

Private insurance

The client submits, or you bill the insurer directly.

Muscular Dystrophy Canada

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

Hardship funding

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

ACSD

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

Program forms in the therapist's portal

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

Direct and private, other payers and rentals

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

See it on a demo system

Book a call and we'll walk through each step with your own ADP process in mind: how cases come in, who handles them, and how you bill today.



Book a call

nexasystems.ca/appointment/1

Web

nexasystems.ca

Phone

905-792-0000

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 brochure show invented data from a demo company.