



myHelp

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The Client Proposal module provides an efficient way to generate individual scenarios and client proposals based upon the accurate program unit costs calculated by the Unit Costing module.

1. create a client proposal

Create a new client scenario and proposal by completing the following:

- Log in to MYP at www.mypcorp.com
- Select 'Login' and then insert your assigned user name and password



1.1. IDENTIFY THE CLIENT

- Select 'Create proposal'
- Search for, and select, the relevant client
- If there is no client select the 'No client' icon
- Create a name for the proposal and select 'Next'

1.2. IDENTIFY PROGRAMS + UNIT COSTS

- Enter the year
- Select the number of programs that the client will require, this will open up the corresponding number of windows for program and unit cost selection
- Select the relevant programs and unit costs from the drop-down menus
- Select 'Next'

Set-up
Program 1
Program 2
Additional
Overview
Summary
Report

SPARROW, JACK DEMO PROPOSAL

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: **239:07 minutes.**

Proposal

Set-up

Year:

Include GST in proposal ☒ Yes ☐ No

Number of programs included in this proposal * ☒ 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 or more

| | |
|------------------|--------------------------------------|
| Program 1 | |
| Program * | ABC Accommodation |
| Unit cost * | Accommodation - 32 Care Lane |
| Program 2 | |
| Program * | ABC Community Support |
| Unit Cost * | Program 1 -Community Support July 13 |

Cancel
ARM
Reports

Save + close
Next

The following pages in the module provide the organisation with significant proposal flexibility. The program unit costs are those previously calculated using the Unit Costing module (refer the Unit Costing myHelp) and are based on a standard hour of time. The client proposal provides module the ability to adjust the proposal/scenario in a number ways as outlined below.

1.3. CALCULATE CLIENT SPECIFIC REQUIREMENTS BY PROGRAM

1.3.1 Direct labour

- For each program, enter a description re direct labour for each item
- Select the rate of pay for each item
- Enter the number of hours for each item
- Select the staff to client ratio for each item
- If relevant, select an operating margin for each item
- Select 'Calculate'

Proposal

Program 1

Program ABC Accommodation Program

Unit cost Property 1 - 32 Care Lane

You are about to calculate a Client Service Proposal (the amount a client will pay you) based on your unit cost calculation and the assumptions you have made in that calculation.

Costs

| Service type (include detail in space provided) | Rate of pay | Quantity hours | Staff to client ratio | Operating margin | Total |
|---|-------------|----------------|-----------------------|------------------|------------|
| Labour - direct client service | | | | | |
| Ordinary hours | Ordinary | 100 | 1:1 | 10% | \$3,008.50 |
| Overnight hours | 1 1/2 times | 100 | 1:3 | 10% | \$1,504.25 |
| Overnight weekend | 2 1/2 times | 50 | 1:3 | 10% | \$1,253.54 |
| | | 0 | | 0% | \$0.00 |
| | | 0 | | 0% | \$0.00 |
| Labour - coordination and planning | | | | | |
| | | 250 | 1:1 | 10% | \$2,455.75 |
| Labour - volunteer costs | | | | | |
| | | 0 | | 0% | \$0.00 |
| Direct cost allocation | | | | | |
| | | 250 | | 10% | \$1,666.50 |
| Indirect cost allocation | | | | | |
| | | 250 | | 10% | \$82.50 |
| | | | | | \$9,937.49 |

[»](#)

1.3.2 Program coordinators + volunteers

- Enter a description re coordinator's labour (and volunteers if required)
- Select the staff to client ratio for each item
- If relevant, select an operating margin for each item

NB: The number of Coordinator hours is automatically totalled based on the direct labour totals above with the amounts calculated from the Unit Costing module.

| | | | | |
|--|----|-----|-----|----------|
| Labour - coordination and planning | | | | |
| Coordination and Planning of Direct Client Service | 60 | 1:3 | 10% | \$120.12 |
| Labour - volunteer costs | | | | |
| | 0 | | 10% | \$0.00 |

1.3.3 Direct + indirect costs

- If required, enter a description re direct and indirect costs
- If relevant, select an operating margin for each item
- Select 'Calculate' to display the total amounts for this program in the proposal.

NB: The number of Direct and Indirect hours are automatically totalled based on the direct labour totals above with the amounts calculated from the Unit Costing module.

- Select 'Next' to move to the next program and repeat the above as many times as required.

After all programs have been entered, additional items can be added if required.

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1.5. REVIEW PROPOSAL OVERVIEW

- Review program sub-totals and select 'Yes' to include relevant programs in the proposal

NB: If the overall total of the proposal is greater than the amount the client has been assessed for, selecting 'No' for any of the programs will exclude them from the proposal and therefore reduce the proposal amount. Alternatively, each individual program could be selected and the amount of hours reduced to lower the proposal amount (refer section 1.3 above).

- Select 'Next'

Set-up

Program 1

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DEMO - CLIENT PROPOSAL (SHORT VERSION)

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: **239:46 minutes.**

Proposal

Overview

Total Program 1 - ABC Accommodation

| | |
|---|----------------|
| Total labour charged to client: | \$6,895.94 |
| Total direct costs charged to client: | \$2,824.13 |
| Total indirect costs charged to client: | \$392.70 |
| Total charged to client (net of GST): | \$10,112.77 |
| GST applicable: | \$1,011.28 |
| Total charged to client (incl. GST): | \$11,124.05 |
| Hourly rate (incl. GST) | \$88.99 |
| Include in proposal | <div>Yes</div> |

1.6. REVIEW SUMMARY

- Review summary
- Enter any additional notes to be included in the reports
- Select 'Next'

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DEMO - CLIENT PROPOSAL (SHORT VERSION)

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: **239:47 minutes.**

Proposal

Summary

Total - All Programs

| | |
|---|-------------|
| Total labour charged to client: | \$7,611.40 |
| Total direct costs charged to client: | \$2,892.77 |
| Total indirect costs charged to client: | \$396.00 |
| Total additional items charged to client: | \$1,100.00 |
| Total charged to client (net of GST): | \$12,000.17 |
| GST applicable: | \$1,200.02 |
| Total charged to client (incl. GST): | \$13,200.19 |

Proposal notes:

1.7. REVIEW FUNDING

- Review funding
- Additional funding fields allows the user to track funding that is non-program specific
- Select 'Calculate'
- Select 'Next'

Set-up
Program 1
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Funding summary

DEMO - CLIENT PROPOSAL (SHORT VERSION)

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: 239:39 minutes.

Proposal

Funding

| Funding value | Funding value |
|---------------|---------------|
| Program 1 | \$ 11,500.00 |
| Program 2 | \$ 900.00 |
| Program 3 | \$ |
| Program 4 | \$ |
| Program 5 | \$ |
| Program 6 | \$ |
| Program 7 | \$ |
| Program 8 | \$ |
| Program 9 | \$ |
| Program 10 | \$ |
| | \$ 12,400.00 |

Additional funding \$

1.8. FUNDING SUMMARY

- Review funding summary
- If additional funding fields have been added, select 'Calculate'
- Select 'Next'

Set-up

Program 1

Program 2

Additional

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Funding

Funding summary

DEMO - CLIENT PROPOSAL (SHORT VERSION)

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: 239:44 minutes.

Proposal

Funding summary

Funding results

| | Funding per unit revenue | Profit/Loss | Profit/Loss per unit |
|------------|--------------------------|-------------|----------------------|
| Program 1 | \$92.00 | \$1,387.23 | \$11.10 |
| Program 2 | \$15.00 | \$112.60 | \$1.88 |
| Program 3 | | \$0.00 | |
| Program 4 | | \$0.00 | |
| Program 5 | | \$0.00 | |
| Program 6 | | \$0.00 | |
| Program 7 | | \$0.00 | |
| Program 8 | | \$0.00 | |
| Program 9 | | \$0.00 | |
| Program 10 | | \$0.00 | |
| Total | \$69.73 | \$899.83 | \$4.86 |

Cancel

Previous

Save + close

Next

1.9. GENERATE REPORTS

- Select report

Set-up

Program 1

Program 2

Additional

Overview

Summary

Funding

Report

DEMO - CLIENT PROPOSAL (SHORT VERSION)

SPARROW Jack

Please respond to each statement by selecting or entering the appropriate response.

This page will timeout in: 239:48 minutes.

Proposal

Report

Link to Client Service Proposal

Link to Internal Proposal

Generate Consolidated Summary of Proposals Report

Cancel

ARM

Reports

Previous

Save + close

Finish

- From this screen, the following reports can be generated:
 - Client Service Proposal
 - Internal Proposal
 - Consolidated Summary of Proposals

NB: This is a consolidated summary of all proposals that can be filtered by program or year.

- Select 'Finish'

2. MYP training + support centre

For training and support options, please refer to MYP Administration, Relationships + Management (ARM) myHelp.