Disability Care for NDIS and Non-NDIS funded clients

This guide is provided by Community Data Solutions to assist your organisation manage NDIS and Non-NDIS funded clients & activities. It is designed to work in conjunction with community Data Solutions NDIS CRM online software. The guide outlines in a step-by-step process how to manage client's care plans, keep an accurate electronic record of case notes and track client's budget. The document provides links to instructional videos of Community Data Solutions online CRM as well as links to NDIA instructional videos and papers.

Community Data Solutions understands that solving the challenges of the NDIS is not just about a software tool. It is about internal processes and workflows that can marry with that tool. To assist organisations to locate the software that meets their needs, Community Data Solutions provide a free one month access to our demonstration software prior to you considering a purchase. Our sales team can discuss with you any questions you may have while you consider our software.

Our company also understands the financial and organisational risks the NDIS presents to your organisation. Hence we are offering a flat $10K build, training, deployment, minimum 20 customisations and support as a capped price for 2020.

NDIS Software Capabilities

Centralised client repository	✔
Individualised funding management	✔
Support plan & service booking management	✔
NDIS customised price list	✔
Client's fee-for-service customised price list	✔
3rd party managed customised price list	✔
One-on-One activities	✔
Day Centre group activities with individualised price	✔
NDIS bulk claims submission to PRODA portal	✔
Case notes registry and report	✔
Client budget management and report	✔
Referral registry	✔
Client invoice management	✔
Bulk invoice export to popular accounting software	✔
Rostering and timesheet Integration with Deputy	✔
Service cancellation fee management	✔

Purchase Order Management	✔
Recurring service budget estimate tools	✔
Group workers to customers ratio calculator	✔
Payroll and award interpretation via Deputy	✔
Worker training and license management via Deputy	✔

2020 Roadmap Capabilities

Community Data Solutions 2020-21 roadmap is designed to extends the existing functionality and deliver the following features:

Travel expenses claim management	✔
3rd Party plan managers support import	✔
Client service booking portal via Deputy	✔
Recurring service management via Deputy	✔
Service cancellation management via Deputy	✔

Client Financial Arrangements

Community Data Solutions NDIS package supports the following client financial arrangements:

NDIA managed budget	Client's budget set and controlled by the NDIS
NDIS self managed budget	Client's NDIS budget is self managed by the client
NDIS 3rd party managed budget	Client's NDIS budget is managed by 3rd party
Fee for Service self managed budget	Client manage own budget
Fee for Service 3rd party managed budget	Client's own budget is managed by 3rd party

Our software package flexible price list provides options to configure each financial arrangement budget to individual's needs in a single consistent approach. NDIS payment requests can be generated for any client funded by the NDIS and customised invoices can be generated for any financial arrangement and debtor including 3rd party providers who are acting as plan managers on behalf of the client.

Enquiry and Waitlist Management

Community Data Solutions' enquiry software allows you to record service enquiries and convert them to client records any time. By capturing key information at enquiry time you can track intake time and follow up with potential clients once service is available. Waiting lists can be configured as additional customisations on solution provision.

Record referral details	✔
Record services requested	✔
Record client contact	✔
Record financial arrangement & NDIS information	✔
Waiting list registry	✔
Follow Up management	✔
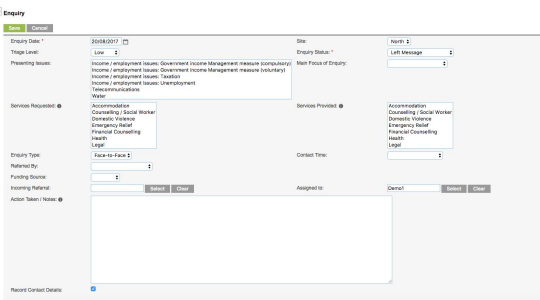
Client Management

On service commencement create the client in the CRM. The client profile remains the core record for the client from hereafter and services are attached to the client profile. Client profile is configurable to your organisation's need and includes the following features:

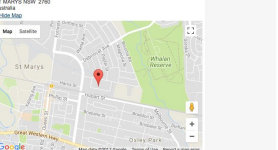|	
Personal & contact information	✔
Disability & medical information	✔
Emergency and support network information	✔
Regular doctor and other health provider information	✔
Billing information	✔
Notifications via Email or SMS	
Document repository	✔
Enquiries registry	✔
Incident registry	✔
Risk management	✔

Contact Management

External stakeholders are recorded as contacts in Community Data Solutions' CRM. These are organisations or individuals which your organisation works with in delivering services to your consumers. Contact records are used to track referrals, purchase orders, services and invoices. The contact profile is configurable to your organisation's need and includes the following features:

Business unit information	✔
Individual contact information	✔
Referral repository	✔
Contact sessions and collaboration repository	✔
Purchase orders & invoices	✔
Document repository	✔
Meetings register	✔
Contracts repository	✔

NDIS Support Plan Management

Each client provided with NDIS support requires a support plan regardless of their funding arrangement or service provided. Support plans in Community Data Solutions' CRM are the equivalent of the NDIS service bookings. The support plan is configurable to your organisation's need and includes the following features:

Financial arrangement configuration	✔
Referral information	✔
Service booking and budget configurations	✔
Client goals registry	✔
Status control with case & closure notes	✔
Review date with notification	✔
Document repository	✔

NDIS - Create Support Plan

COMMUNITY DATA SOLUTIONS
NDIS - CREATE SUPPORT PLAN

[View Training Video](#)

Activity Intake and Claim Management

Record one-on-one client activities with case notes. Plan future activities and schedule appointments to support workers. Generate NDIS and Fee-for-Service claims. Activities are either time or quantity based and support all NDIS support items including the following features:

Record activities and service delivered	✔
Plan future activity schedule including recurring services	✔
Assign activities to support workers	✔
Record activity notes and actions	✔
Generate time and quantity based claims	✔
Activity Audit Log	✔

NDIS - Record Support Activities and Claims

COMMUNITY DATA SOLUTIONS
NDIS - RECORD ACTIVITIES AND CLAIMS

[View Training Video](#)

Day Centre Group Work Management

This component allows you to configure day centre groups and allocate group participants with individualised funding arrangements. Plan future activities and schedule appointments to support workers. Generate NDIS and Fee-for-Service claims based on the financial arrangement configured to each participant. Activities are either time or quantity based and support all NDIS support items including the following features:

Record group activities	✔
Record client participation	✔
Individualised financial arrangements	✔
Assign activities to support workers	✔
Generate individualised client claims	✔
Worker to customer ratio calculator	✔
Activity audit trail/log	✔
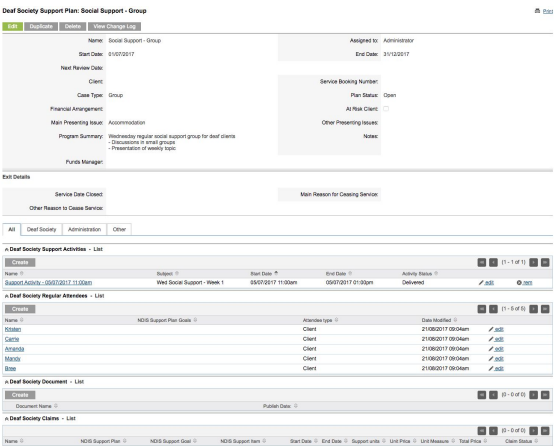
NDIS Claim and Payment Request Management

Generate NDIS payment request files and submit bulk claims to My Place PRODA portal. Activities are either time or quantity based and support all NDIS support items including the following features:

Claim standard and cancellation charges	✔

Search claim repository by financial arrangement	✔		NDIS - Manage Payment Requests
Manage PRODA payment requests by status	✔		
Generate bulk payment request files for PRODA	✔		COMMUNITY DATA SOLUTIONS
Import PRODA payment request response files	✔		NDIS - MANAGE PAYMENT REQUESTS
Resubmit capped and rejected claims	✔		
Invoice approved claims	✔		
Activity Audit Log	✔		

[View Training Video](#)

Provide clients with information about the progress of their plan

Provide monthly client usage reports to clients, fund managers or eligible support person with a real time record of budget and funds balance of their plan. The report can be email or posted to your client and includes the following information.

Print and send support plan information	✔	NDIS - Support Plan Usage
Print and send plan budget information	✔	
Real time funds balance	✔	
Print customer scheduled activities for any time period	✔	

Plan Information

Plan name	Fiona Bloom - 55467633	NDIS ID	456778443
Client Name	Fiona Bloom	Plan Start date	01/04/17
Assigned to	Administrator	Next review date	01/07/17

Plan Goals

Goal Name	Unit Price	Frequency	Support Units Delivered	Support Units Left	Total Amount(in $)	Amount Charged(in $)	Amount left(in $)
Domestic Assistance	42.43	Weekly	2.00	98.00	$ 4,243.00	$ 84.86	$ 4,158.14
Coordination of Support	94.06	Weekly	4.00	96.00	$ 9,406.00	$ 376.24	$ 9,029.76
Day Centre Group Activity	22.35	Weekly	9.00	41.00	$ 1,117.50	$ 201.15	$ 916.35
				Total	$ 14,766.50	$ 662.25	$ 14,104.25

Tracking NDIS Claims and Revenue

The Community Data Solutions CRM has several reports to assist you to manage the claims and remaining funds within the system. Track the status of claims for any period using NDIS Claims Report or export claim data to spreadsheet for ad hoc reporting. Claims report features include:

Periodical claims report	✔	NDIS - Claims List
View total pending, submitted, paid or rejected claims	✔	07 August 2017 - 21 August 2017
View claims by financial arrangement	✔	Showing all available sites / Showing all available statuses
View claims managed by 3rd party organisations	✔	
Output report to CSV, Excel or PDF	✔	

Claimable Activities in Reporting Period

Claim (ref num)	Client	Support Item	Start Date	End Date	Status	Support Units	Unit Price	$ Value
29	Mr. Jeremy Parnel	coordination of supports	2017-08-07	2017-08-07	Submitted	2.0	94.06	188.12
33	Mr. Kevin More	group based community, social	2017-08-09	2017-08-09	Submitted	1.0	22.35	22.35
43	Mr. Jeremy Parnel	assistance with personal	2017-08-07	2017-08-07	Submitted	2.0	42.43	84.86
45	Mr. Jeremy Parnel	assistance with personal	2017-08-08	2017-08-08	Submitted	2.0	42.43	84.86
47	Mr. Jeremy Parnel	assistance with personal	2017-08-09	2017-08-09	Submitted	2.0	42.43	84.86
59	Mr. Kevin More	group based community, social	2017-08-15	2017-08-15	Pending	1.0	22.35	22.35
61	Ms. Fiona Bloom	group based community, social	2017-08-15	2017-08-15	Pending	1.0	22.35	22.35
63	Mr. Phil Good	group based community, social	2017-08-15	2017-08-15	Pending	1.0	24.0	24.0
69	Mr. Jeremy Parnel	coordination of supports	2017-08-17	2017-08-17	Pending	0.0	94.06	0.0
							Total $ Value	533.75

Deputy Rostering & Workforce Management Solution

Community Data Solutions has partnered with Deputy to deliver a rostering rostering solution to NDIS providers. Deputy offers a comprehensive range of workforce management solutions from scheduling to award interpretation. For more information visit deputy.com website.
Deputy rostering tools can be used as a stand alone software or as integrated solution within the Community Data Solutions CRM.

Cloud based Scheduling Solution	✔
Support Worker Mobile App with Timesheets	✔
Timesheets with payroll accounting integration	✔
Award interpretation	✔
Integration with a wide range of HR and accounting solutions	✔

Frequently Asked Questions

Review the following questions for further information:

What are my options in relation to rostering and timesheets?	The following options are supported:
	1. Use our partner company Deputy as a stand alone option to manage your rostering environment.
	2. Use Deputy rostering in an integrated manner within the CRM to deliver end-to-end service.
	3. We can integrate with your existing rostering package as a custom integration work.

Can CDS CRM integrate with financial systems	The following options are supported:
	1. Community Data Solutions can provide invoice export functions to any accounting software supporting sales import via CSV file.
	2. We can integrate with your existing financial package as a custom integration work.

What information would you require from me to get started?	Organisations seeking the standard $10K NDIS package will need to provide the following:
	1. Organisation logo.
	2. Firstname, Surname, email address of all users.
	3. Site locations from which you deliver services
	4. NDIS operating regions and NDIS support items you have been approved for.
	5. Information to our project manager about any changes required to the client intake area of the CRM. These are typically questions that relate to the core types of disability your organisation supports.
	6. Date when you would like to start using the NDIS software and optional training dates.
	7. Key liaison/implementation staff member who will assist with the change management process and training of staff when the system is introduced.

If I purchase the **standard package for $10K** how long before the system would be available to me once the contract is signed?	Once the contract is signed then 3-4 weeks is the usual timeframe for establishing a standard version of the system. This relies on your organisation contributing the information we require from you in a timely fashion and ensuring the training can be organised with your staff within this timeframe.
How many staff can attend training?	For optimal training outcomes we allow for a maximum of 10 staff for one day of online training. Face-to-face training can be organised onsite however travel and accommodation costs apply depending on your location.
Who owns the data and where is it stored?	Data ownership remains yours throughout the life license duration and the contract clearly indicates this. All data is stored in Australia at premium data warehouses.
What is the nature of the contract I have with Community Data Solutions?	CDS provides an ongoing license contract which allows for an exit at any quarterly interval. Read our [Terms and Conditions](#) for more information.
If I leave can I get my data back?	Yes, it is Community Data Solutions obligations under the terms of the contract to provide you with a copy of your data at time of termination in a format acceptable and usable to you.
What would be the ongoing costs post-July 2018?	In order to quote for future costs we would need the following information: • Number of users require full access • Number of users only requiring rostering app • Number of lite users - staff who only require access once per week
Is Community Data Solutions considering a client portal and if so when would this be available?	Customers and their family can access client service schedules and approve service delivery via Deputy app. Additional charges may apply.

Pricing

Community Data Solutions offer a capped price of $10,000 for the 2020. This cost includes;

1. Database deployment
2. Setting up users
3. Scoping of a maximum of 20 customisations
4. Project Management
5. Two day training online
6. Access to CDS NDIS Package manual and video's
7. Database configuration of logo, users and sites appropriate to your organisation

The following ongoing pricing alternatives are available for your users, and these prices apply post July 2018:

Full CRM access users (min 5 licenses)	$55-60 per user per month

Support worker using Deputy mobile app, operating independently of Community Data Solutions CRM*	$5.5 per user per month
Support worker using Deputy mobile app integrated with Community Data Solutions CRM*	$10.5 per user per month

* Deputy licences apply from go live date are payable to Deputy. CDS will include Deputy monthly charges for all integrated CRM and Deputy solutions.

Optional Software Components

The following components can be purchased as add ons to extend the CRM NDIS functionality. Please request demonstrations of additional components from our sales team.

Deputy set-up, integration and training	$3,500
Import clients from existing system	$980 subject to complexity
Import workers and clients to Deputy	$980 subject to complexity
DSS Data Exchange compliant CHSP/HCP software	$2,000

Please see our website for all available solutions.

For further enquiries or access to our one month demo CRM contact:

Greg Were
greg@communitydscom.au
1800 503 981
www.communityds.com.au