Define project scope:

* Automate task management and scheduling for support coordinators
* Streamline communication between support coordinators, service providers, and clients
* Integration with Google products (Calendar, Drive, Gmail) for seamless collaboration and information sharing
* Integration with MYOB for invoicing and financial management
* Modular design for easy addition of future integrations (e.g., CRM, reporting tools, client portals)
* Intuitive user interface and user experience for easy adoption and minimal training requirements
* Integration with incident reporting and risk management tools to improve response time and compliance
* Customizable templates for client support plans and case notes to save time and maintain consistency
* Collaboration features to allow multiple support coordinators to work together on complex cases
* Automated progress tracking and goal-setting for clients to keep support coordinators informed and accountable
* Integration with a client portal for transparent communication and access to relevant documents and updates
* Analytics dashboard to provide insights on service delivery, client outcomes, and staff performance
* Mobile app for support coordinators to manage tasks and communicate with stakeholders on the go

Identify stakeholders and target users:

* Support coordinators: primary users who will manage tasks, schedules, and communications through the software
* Service providers: will receive task assignments and updates, and provide service updates
* Disabled individuals: clients who will benefit from improved service coordination and communication
* Management/organizations: oversee the use of the software, track progress, and assess its effectiveness
* Integration with incident reporting and risk management tools to improve response time and compliance
* Customizable templates for client support plans and case notes to save time and maintain consistency
* Collaboration features to allow multiple support coordinators to work together on complex cases
* Automated progress tracking and goal-setting for clients to keep support coordinators informed and accountable
* Integration with a client portal for transparent communication and access to relevant documents and updates
* Analytics dashboard to provide insights on service delivery, client outcomes, and staff performance
* Mobile app for support coordinators to manage tasks and communicate with stakeholders on the go

Conduct market research:

* Identify existing software solutions in the disability services sector
* Evaluate their features, user experience, and pricing models
* Analyze customer reviews and feedback to understand the strengths and weaknesses of each competitor
* Identify gaps in the market and areas where your software could offer unique advantages, such as better integrations, improved user experience, or more efficient automation
* Research industry trends and emerging technologies to ensure your software stays relevant and competitive
* Integration with incident reporting and risk management tools to improve response time and compliance
* Customizable templates for client support plans and case notes to save time and maintain consistency
* Collaboration features to allow multiple support coordinators to work together on complex cases
* Automated progress tracking and goal-setting for clients to keep support coordinators informed and accountable
* Integration with a client portal for transparent communication and access to relevant documents and updates
* Analytics dashboard to provide insights on service delivery, client outcomes, and staff performance
* Mobile app for support coordinators to manage tasks and communicate with stakeholders on the go

1. Management and Administration:
   * Management oversight and permissions
   * Manager's dashboard for an overview of support coordinator capacity and billing
   * Adding new users with appropriate roles and permissions
   * KPI reporting
   * Secure program access with limited access profiles
   * Integration with PRODA
   * Integration with incident reporting and risk management tools
   * Analytics dashboard to provide insights on service delivery, client outcomes, and staff performance

* Management oversight and permissions: This feature offers a high level of control for managers to monitor their support coordinator's capacity and billing, making it easy to allocate resources and manage their team effectively.
* Manager's dashboard: This centralized hub provides an overview of support coordinator capacity and billing, allowing managers to track progress and make data-driven decisions.
* Add new users with appropriate roles and permissions: Managers can easily onboard new team members by assigning them suitable roles and access levels within the software.

1. Support Coordinator Functionality:
   * User-friendly interface
   * Time tracking and note recording
   * Support coordinator training and onboarding
   * Purpose-built support coordination tools
   * Simple care management
   * Plan budget tracking and management
   * Mobile and web applications for client access
   * Collaboration features for multiple support coordinators
   * Automated progress tracking and goal-setting
   * Mobile app for on-the-go task management and communication
   * Record case notes and billable time in the same note: This feature streamlines the process of documenting client interactions, reducing manual data entry and the risk of errors.

* Automated tracking and monitoring of support coordination hours: The software automatically logs support coordination hours, reducing the administrative burden on support coordinators and ensuring accurate timekeeping.
* Track participant milestones and plan budgets: Support coordinators can monitor client progress and manage plan budgets effectively, ensuring that funds are allocated appropriately and milestones are met.

1. Document and Form Management:
   * Customizable forms and templates with custom branding and logo
   * Participant interface with electronic signature support
   * Secure document management
   * Cloud-based solution
   * Pre-loaded NDIS line items and price guide
   * Customizable templates for client support plans and case notes
   * Integration with a client portal for transparent communication and access

* Create forms and templates with custom branding and logo: The software allows users to create customized forms and templates that reflect their organization's branding, enhancing professionalism and consistency.
* Generate standard forms for use across the team: Support coordinators can access a library of pre-built forms, such as Service Agreements, Consent Forms, and Checklists, ensuring consistency and reducing the time spent creating documentation.
* Participant interface for direct access: Clients can directly access the system, allowing them to view relevant documents, sign forms electronically, and receive notifications when their input is needed.

1. Billing, Reporting, and Integration:
   * NDIS billing and support coordination budget management
   * Bulk claims generation for NDIS
   * Comprehensive client record management
   * Integration with accounting software (MYOB, Xero, QuickBooks)
   * Easy-to-read reports
   * Proactive alerts for plan management
   * Advanced analytics and integration
   * Service provider management and linking
   * Integration with ChatGPT API for natural language processing and chatbot functionality
   * Google Calendar, Drive, Sheets, and Gmail for scheduling, document storage, data management, and communication
   * MYOB invoicing API for billing and financial management
   * Modular integrations for future expansion (e.g., payment gateway, email notification system, etc.)
   * Automate task management and scheduling
   * Streamline communication between support coordinators, service providers, and clients
   * Intuitive user interface and user experience for easy adoption and minimal training requirements

* NDIS billing and support coordinator budget management: The software streamlines the billing process by generating a CSV file formatted for NDIS requirements, which can be directly imported into most accounting software.
* Manage and link service providers: Support coordinators can build a library of community, mainstream, and funded support provider options, making it easy to identify their strengths and link them directly to participant profiles.
* Support coordinator training and onboarding: The platform includes a comprehensive training module for support coordinators, ensuring they are equipped with the necessary skills and knowledge to use the software effectively.
* Purpose-built tools to support consistent service delivery, demonstrate choice and control, manage conflicts of interest, and evidence capacity built: The software is designed specifically for NDIS support coordination, offering tools that align with the unique requirements of this sector.
* Assign permissions to billable hours, add participants as required, and manage plans and agreements: The software offers granular control over the management of client data, ensuring that sensitive information is protected and handled appropriately.
* Lifetime archive feature for non-active or closed participants: This feature enables organizations to maintain a secure archive of client data, meeting NDIS legislation requirements and facilitating easy access for auditors.
* Pre-loaded NDIS line items and price guide: The software comes with a comprehensive list of NDIS line items, simplifying the process of tracking and managing participant plan budgets.
* Comprehensive client record management, accounting integration, and reporting: The platform offers robust client record management, integration with popular accounting software, and

1. Management and Administration:
   * Management oversight and permissions: This feature offers a high level of control for managers to monitor their support coordinator's capacity and billing, making it easy to allocate resources and manage their team effectively.
   * Manager's dashboard: This centralized hub provides an overview of support coordinator capacity and billing, allowing managers to track progress and make data-driven decisions.
   * Add new users with appropriate roles and permissions: Managers can easily onboard new team members by assigning them suitable roles and access levels within the software.
2. Support Coordinator Functionality:
   * User-friendly interface: The software is designed to be intuitive and easy-to-use for support coordinators, allowing them to focus on their core responsibilities.
   * Record case notes and billable time in the same note: This feature streamlines the process of documenting client interactions, reducing manual data entry and the risk of errors.
   * Automated tracking and monitoring of support coordination hours: The software automatically logs support coordination hours, reducing the administrative burden on support coordinators and ensuring accurate timekeeping.
   * Track participant milestones and plan budgets: Support coordinators can monitor client progress and manage plan budgets effectively, ensuring that funds are allocated appropriately and milestones are met.
3. Document and Form Management:
   * Create forms and templates with custom branding and logo: The software allows users to create customized forms and templates that reflect their organization's branding, enhancing professionalism and consistency.
   * Generate standard forms for use across the team: Support coordinators can access a library of pre-built forms, such as Service Agreements, Consent Forms, and Checklists, ensuring consistency and reducing the time spent creating documentation.
   * Participant interface for direct access: Clients can directly access the system, allowing them to view relevant documents, sign forms electronically, and receive notifications when their input is needed.
4. Billing, Reporting, and Integration:
   * NDIS billing and support coordinator budget management: The software streamlines the billing process by generating a CSV file formatted for NDIS requirements, which can be directly imported into most accounting software.
   * Manage and link service providers: Support coordinators can build a library of community, mainstream, and funded support provider options, making it easy to identify their strengths and link them directly to participant profiles.
   * Support coordinator training and onboarding: The platform includes a comprehensive training module for support coordinators, ensuring they are equipped with the necessary skills and knowledge to use the software effectively.
   * Purpose-built tools to support consistent service delivery, demonstrate choice and control, manage conflicts of interest, and evidence capacity built: The software is designed specifically for NDIS support coordination, offering tools that align with the unique requirements of this sector.
   * Simple, flexible pricing: The pricing structure is transparent and cost-effective, allowing users to pay only for the features they need and offering a 14-day free trial to explore the software.
   * Assign permissions to billable hours, add participants as required, and manage plans and agreements: The software offers granular control over the management of client data, ensuring that sensitive information is protected and handled appropriately.
   * Lifetime archive feature for non-active or closed participants: This feature enables organizations to maintain a secure archive of client data, meeting NDIS legislation requirements and facilitating easy access for auditors.
   * Pre-loaded NDIS line items and price guide: The software comes with a comprehensive list of NDIS line items, simplifying the process of tracking and managing participant plan budgets.
   * Comprehensive client record management, accounting integration, and reporting: The platform offers robust client record management, integration with popular accounting software, and

**FINAL features:**

1. Support Coordination Tools:

* User-friendly interface for support coordinators, with the ability to record case notes and billable time in the same note, automated tracking and monitoring of support coordination hours, track participant milestones, and plan budgets
* Purpose-built tools to support consistent service delivery, demonstrate choice and control, manage conflicts of interest, and evidence capacity built
* Time tracking and note recording
* Pre-loaded NDIS line items and price guide, simple interface for tracking time spent and recording notes, easily track and manage participant plan budget allocation by provider, easily track budget usage and generate usage statements for clients, easily generate bulk claims to NDIS against time recorded
* Customizable templates for client support plans and case notes to save time and maintain consistency
* Automated progress tracking and goal-setting for clients to keep support coordinators informed and accountable
* Automate task management and scheduling for support coordinators
* Intuitive user interface and user experience for easy adoption and minimal training requirements
* Mobile app for support coordinators to manage tasks and communicate with stakeholders on the go

1. Documentation and Compliance:

* Ability to create forms and templates with custom branding and logo, and generate standard forms for use across the team, including Service Agreements, Consent Forms, Checklists, and more
* Lifetime archive feature for non-active or closed participants, meets NDIS legislation with easy access for auditors
* Evidence of records and service delivery information in one place, easily accessible, and meets NDIS compliance requirements
* Compliance with NDIS legislation and audit support
* Integration with incident reporting and risk management tools to improve response time and compliance

1. Integration and Collaboration:

* Participant interface for direct access, with the ability to automatically populate forms and send them directly to the participant for electronic signing, and receive notifications when signed
* NDIS billing and support coordinator budget management, with the ability to generate a CSV file formatted for NDIS requirements that feeds directly into most accounting software and automatically updates the support coordinator budget
* Ability to manage and link service providers, build a library of community, mainstream, and funded support provider options to share across the team, identify their strengths, and link directly to participant profiles
* Support coordinator training and onboarding, with a full support coordinator training platform available at no extra charge
* Comprehensive client record management, MYOB/Xero/QuickBooks accounting integration, easy-to-read reports, ready to use from day 1, proactive alerts to stay on top of managing client plans, secure document management, cloud-based solutions, portable mobile and web applications for client access, completely customizable and flexible, secure program access and limited access profiles, and advanced analytics and integration
* Collaboration features to allow multiple support coordinators to work together on complex cases
* Integration with a client portal for transparent communication and access to relevant documents and updates
* Analytics dashboard to provide insights on service delivery, client outcomes, and staff performance
* ChatGPT API for natural language processing and chatbot functionality
* Google Calendar for scheduling and appointment management
* Google Drive for document storage and sharing
* Google Sheets for data management and reporting
* MYOB invoicing API for billing and financial management
* Integration with Google products (Calendar, Drive, Gmail) for seamless collaboration and information sharing
* Integration with MYOB for invoicing and financial management
* Modular design for easy addition of future integrations (e.g., CRM, reporting tools, client portals)
* Other modular integrations for future expansion (such as a payment gateway, email notification system, etc.)

1. Support Coordination Tools:

* User-friendly interface for support coordinators, with the ability to record case notes and billable time in the same note, automated tracking and monitoring of support coordination hours, track participant milestones, and plan budgets
* Purpose-built tools to support consistent service delivery, demonstrate choice and control, manage conflicts of interest, and evidence capacity built
* Pre-loaded NDIS line items and price guide, simple interface for tracking time spent and recording notes, easily track and manage participant plan budget allocation by provider, easily track budget usage and generate usage statements for clients, easily generate bulk claims to NDIS against time recorded
* Support coordinator training and onboarding, with a full support coordinator training platform available at no extra charge

1. Documentation and Compliance:

* Ability to create forms and templates with custom branding and logo, and generate standard forms for use across the team, including Service Agreements, Consent Forms, Checklists, and more
* Participant interface for direct access, with the ability to automatically populate forms and send them directly to the participant for electronic signing, and receive notifications when signed
* Lifetime archive feature for non-active or closed participants, meets NDIS legislation with easy access for auditors
* Evidence of records and service delivery information in one place, easily accessible, and meets NDIS compliance requirements

1. Integration and Collaboration:

* NDIS billing and support coordinator budget management, with the ability to generate a CSV file formatted for NDIS requirements that feeds directly into most accounting software and automatically updates the support coordinator budget
* Ability to manage and link service providers, build a library of community, mainstream, and funded support provider options to share across the team, identify their strengths, and link directly to participant profiles
* Comprehensive client record management, MYOB/Xero/QuickBooks accounting integration, easy-to-read reports, ready to use from day 1, proactive alerts to stay on top of managing client plans, secure document management, cloud-based solutions, portable mobile and web applications for client access, completely customizable and flexible, secure program access and limited access profiles, and advanced analytics and integration

**PLAN**

Here is a prioritized plan for building this software:

1. User-friendly interface for support coordinators: This is the most important aspect of the software and will require a focus on design and usability. The interface should be intuitive, easy to use, and make it simple for support coordinators to carry out their tasks.
2. Time tracking and note recording: This feature will allow support coordinators to easily keep track of the time they spend with clients and record notes about their interactions. This information will be used for billing and reporting purposes.
3. Purpose-built support coordination tools: This feature will provide support coordinators with the tools they need to perform their job effectively. These tools should include tools for managing participant goals, tracking progress, and managing conflicts of interest.
4. Simple care management: This feature will allow support coordinators to manage their clients' care plans and ensure they are getting the support they need. This will include tracking participant milestones, budget usage, and linking clients with appropriate service providers.
5. Plan budget tracking and management: This feature will allow support coordinators to track the budget allocated to each client's plan and ensure they are staying within budget.
6. Automated progress tracking and goal-setting: This feature will automatically track participant progress and set goals based on the information entered by support coordinators.
7. Customizable forms and templates with custom branding and logo: This feature will allow support coordinators to create custom forms and templates with their own branding and logo for use with clients.
8. Participant interface with electronic signature support: This feature will allow clients to sign forms and agreements electronically, reducing the need for in-person signatures.
9. Pre-loaded NDIS line items and price guide: This feature will provide support coordinators with a pre-loaded list of NDIS line items and pricing information to simplify the billing process.
10. Customizable templates for client support plans and case notes: This feature will allow support coordinators to create custom templates for client support plans and case notes.
11. NDIS billing and support coordination budget management: This feature will allow support coordinators to manage their billing and budgeting for NDIS clients.
12. Bulk claims generation for NDIS: This feature will allow support coordinators to generate bulk claims to NDIS based on the time recorded for clients.
13. Comprehensive client record management: This feature will provide support coordinators with a centralized location for managing client records, including client information, support plans, case notes, and billing information.
14. Integration with accounting software (MYOB, Xero, QuickBooks): This feature will allow support coordinators to integrate
15. Mobile and web applications for client access: This feature will provide clients with access to their support plans and progress reports through a web or mobile application.
16. Collaboration features for multiple support coordinators: This feature will allow multiple support coordinators to work together on the same client case and share information and updates.
17. Mobile app for on-the-go task management and communication: This feature will provide support coordinators with a mobile app for managing tasks and communicating with clients and service providers while on the go.
18. Secure document management: This feature will provide a secure and centralized location for storing client documents, such as support plans, case notes, and signed agreements.
19. Cloud-based solution: This feature will provide support coordinators with access to the software from anywhere with an internet connection.
20. Integration with a client portal for transparent communication and access: This feature will allow clients to access their support plans, case notes, and other information through a secure portal.

Phase 2: Design and Development

* User-friendly interface for support coordinators
* NDIS billing and support coordinator budget management
* Purpose-built tools to support consistent service delivery
* Integration with accounting software (MYOB, Xero, QuickBooks)
* Customizable forms and templates
* Comprehensive client record management
* Integration with incident reporting and risk management tools
* Automated progress tracking and goal-setting for clients
* Integration with a client portal for transparent communication

Phase 3: Integration and Collaboration

* Ability to manage and link service providers
* Collaboration features for multiple support coordinators to work together
* Integration with Google products (Calendar, Drive, Gmail)
* Mobile app for support coordinators
* ChatGPT API for natural language processing and chatbot functionality

Phase 4: Compliance and Security

* Lifetime archive feature for non-active or closed participants
* Evidence of records and service delivery information
* Secure document management
* Secure program access and limited access profiles

**AI**

Phase 2: Design and Development

2.1 User-friendly interface for support coordinators: AI-powered UX design tools can generate interface mockups based on user behavior patterns and preferences.

2.2 NDIS billing and support coordinator budget management: AI-based algorithms can analyze historical billing data to predict future budget requirements and optimize resource allocation.

2.3 Purpose-built tools to support consistent service delivery: AI can analyze client data to identify trends and suggest best practices for service delivery.

2.4 Integration with accounting software (MYOB, Xero, QuickBooks): AI can help in automating data entry tasks by extracting relevant data from invoices and receipts and inputting them into the accounting software.

2.5 Customizable forms and templates: AI can generate templates based on user inputs and preferences, offering dynamic forms that adapt to client needs.

2.6 Comprehensive client record management: AI can use natural language processing (NLP) to analyze and categorize client information, facilitating quicker and more accurate record searches.

2.7 Integration with incident reporting and risk management tools: AI can predict potential incidents and risks by analyzing historical data, allowing for proactive measures to be taken.

2.8 Automated progress tracking and goal-setting for clients: AI can analyze client data to generate personalized goals and track progress towards those goals, providing real-time feedback and recommendations.

2.9 Integration with a client portal for transparent communication: AI chatbots can handle routine client inquiries, providing quick and accurate responses while freeing up support coordinators' time.

Phase 3: Integration and Collaboration

3.1 Ability to manage and link service providers: AI can analyze service providers' performance and match them with client needs, streamlining the selection process.

3.2 Collaboration features for multiple support coordinators to work together: AI can identify patterns in communication and suggest ways to improve team collaboration.

3.3 Integration with Google products (Calendar, Drive, Gmail): AI can automate scheduling and document management tasks, reducing manual effort.

3.4 Mobile app for support coordinators: AI-powered voice assistants can help support coordinators manage tasks and communicate with stakeholders on the go.

3.5 ChatGPT API for natural language processing and chatbot functionality: ChatGPT can be used to create chatbots that provide automated support and information to clients, service providers, and support coordinators.

Phase 4: Compliance and Security

4.1 Lifetime archive feature for non-active or closed participants: AI can analyze and classify archived data to ensure quick retrieval during audits or other compliance-related tasks.

4.2 Evidence of records and service delivery information: AI can automatically generate reports and analyze data to ensure compliance with NDIS requirements.

4.3 Secure document management: AI-powered document analysis tools can identify sensitive information and apply appropriate security measures.

4.4 Secure program access and limited access profiles: AI can analyze user behavior to detect and prevent unauthorized access, ensuring a secure platform for all users.

Phase 1: Requirements Gathering and Analysis (2 weeks)

* Meet with stakeholders, including support coordinators and clients, to gather requirements and feedback on the software's features and functionality
* Create a detailed project plan that outlines the tasks and milestones for building the software
* Define the project scope and set project goals and objectives

Phase 2: Design and Prototyping (4 weeks)

* Create wireframes and prototypes of the user interface and user experience
* Develop a design system that will be used to guide the look and feel of the software
* Gather feedback from stakeholders on the design and make any necessary changes

Phase 3: Development (16 weeks)

* Develop the core functionality of the software, including the user-friendly interface, time tracking and note recording, and purpose-built support coordination tools
* Integrate the software with the ChatGPT API and Google products, such as Calendar, Drive, Sheets, and Gmail
* Develop the participant interface with electronic signature support and secure document management
* Integrate the software with MYOB invoicing API for billing and financial management

Phase 4: Testing and Use