# Role–Responsibility & Automation Matrix – NDIS Case Management System

For: Primacy Care Australia

Purpose: To link each workflow stage in the NDIS Case Management System to responsible roles, system automations, and measurable KPIs, ensuring accountability, efficiency, and compliance.

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| Workflow Stage | Responsible Role | System Automation | KPIs (Accountability) |
| Referral Intake & Client Onboarding | Intake Coordinator | - Auto-upload & OCR parsing of referrals (PDF/Word/Excel) - Mandatory field validation before proceeding - Duplicate participant detection - Auto-assign referral to intake queue based on source | - Avg. time from referral receipt to profile creation - % of referrals processed within 24 hrs - Duplicate entry rate |
| Service Agreement Preparation & Signing | Intake Coordinator / Intake Manager | - Pre-populate agreement from participant profile - Cost validation before sending agreement - E-signature with auto-reminders every 48 hrs - Auto-save signed copy with timestamp | - Avg. turnaround from profile creation to signed agreement - % of agreements signed within 7 days - Agreement error rate |
| Funding Verification | Finance Officer – Billing | - Auto-calculate available budget vs planned services - Alert for insufficient funds - Projected budget burn rate - Store verification record in participant file | - Avg. time for funding verification - % of cases delayed due to funding - Accuracy of budget projections |
| Allocation to Support Worker | Service Delivery Allocation Officer | - Auto-match engine (location, skills, availability) - Live map view of available workers - Compliance status check before allocation - Worker confirm/decline via mobile | - Avg. allocation time from “Ready” status - % allocations accepted on first attempt - Allocation accuracy (match success after Meet & Greet) |
| Meet & Greet Process | Service Delivery Coordinator | - Auto-schedule in calendar with reminders - Feedback capture via mobile app for both parties - If declined → auto-return to allocation queue | - % of Meet & Greets leading to ongoing service - Avg. time from allocation to Meet & Greet - Participant satisfaction score |
| Ongoing Shift Scheduling & Service Delivery | Service Delivery Coordinator / Support Worker | - Pre-fill recurring shifts for plan period - Automated shift reminders (24 hrs & 2 hrs prior) - GPS-validated clock-in/out - Real-time shift status board | - Shift completion rate - % of last-minute cancellations - Avg. time to fill open shifts |
| Recruitment & Staffing Management | HR Manager / HR Recruiter | - Auto-generate recruitment request when no worker match - Candidate onboarding tracker - Compliance expiry alerts for all active workers | - Time from recruitment request to onboarding - % of workers with full compliance docs - % of compliance lapses avoided |
| Compliance & Legal Oversight | Quality Manager / General Manager | - Red/amber/green compliance dashboard - Auto-flag non-compliance - One-click compliance report for audits | - % of workers & participants fully compliant - Avg. time to resolve compliance issues - Audit pass rate |
| Reporting & Analytics | CEO / General Manager | - Auto-generate weekly role-based KPI dashboards - Drill-down to case-level detail - Trend analysis on incidents, feedback, and funding | - Weekly KPI review completion - Number of overdue corrective actions - Departmental performance vs targets |