Service Delivery Department Module – NDIS CMS Brief & Checklist

# Scope & Objectives

• Match & allocate staff to participants within 20–30 min radius.

• Enforce participant requirements (skills, certifications, preferences).

• Support casual staff model: fortnightly unavailability, shift offers, fatigue rules.

• Integrate allocation → scheduling → timesheets → payroll → billing.

# Roles & Permissions

• Service Delivery Coordinator: create shifts, allocate staff, manage issues, approve timesheets.

• Service Delivery Manager: oversight, escalation, configuration, bulk scheduling.

• Quality/Compliance: verify notes, incidents, restrictive practices.

• Finance: read-only approved timesheets and billing lines.

• HR: read skills/clearances.

• Staff (App): accept/decline offers, declare unavailability, clock in/out, add notes.

• Participants/Family: view roster, messages, service logs.

# Matching & Allocation Logic

• Filter eligible staff: required certs valid, availability overlaps, fatigue limits, drive-time ≤ 30 mins.

• Scoring factors: drive time, skills/needs match, preferences, continuity, reliability, cost.

• Allocation: auto-offer ranked staff with expiry and cascade; manual shortlist for coordinators.

• Edge cases: open shifts broadcast, double-booking detection, co-allocation for high-risk.

# Scheduling & Day-to-Day Ops

• Shift lifecycle: Draft → Offered → Accepted → Confirmed → In-Progress → Completed → Approved.

• Staff app: clock-in/out with geo-fence, tasks, progress notes, incidents, travel logging.

• Participant portal: roster visibility, after-visit summaries.

• Same-day management: cancellations, no-shows, reallocation, escalation tree.

# Timesheets & Approvals

• Auto-generate timesheets from clock-in/out + travel + allowances.

• Staff submit, participant confirm (optional), coordinator approves.

• Lock after approval, export to payroll.

# Billing & Invoicing

• Map completed shifts to NDIS support item codes.

• Apply price limits, TTP, travel/cancellation rules.

• Route invoices to NDIS portal, plan manager, or self-managed participant.

• Track accepted/rejected claims.

# Unavailability & Casual Workforce Rules

• Fortnightly unavailability submission required by cutoff.

• Missing submission = treated available, with reminders.

• Casual rules: shift offers can be declined, 2-hour minimums, fatigue guardrails.

# Optimisation & Recommendations

• Continuity of care prioritisation.

• Route optimisation to reduce travel.

• Training recommendations for hard-to-fill shifts.

• Performance insights: reliability, participant feedback, incidents.

# Data Model (Core Entities)

• participants, staff, shifts, shift\_offers, assignments, attendance, timesheets, billing\_lines, incidents, audit\_log.

# APIs (sample)

• POST /api/shifts (create), POST /api/shifts/:id/allocate (auto-allocate staff).

• POST /api/offers/:id/respond (accept/decline).

• POST /api/shifts/:id/clock-in, POST /api/shifts/:id/clock-out.

• POST /api/timesheets/submit, approve, billing generation.

• POST /api/staff/:id/unavailability (fortnightly).

# UI/UX

• Coordinator console: smart allocation, live board, map view.

• Staff app: shift offers, roster sync, clock-in/out, unavailability submission.

• Participant portal: upcoming visits, feedback prompts.

# Compliance & Safety

• Block allocation if mandatory certs expired.

• Mandatory notes templates for high-risk clients.

• Incident capture mapped to Reportable/Non-reportable.

# Dashboards & KPIs

• Service delivery: fill rate %, time-to-fill, cancellations %, continuity index.

• Workforce: unavailability compliance %, fatigue rule compliance.

• Financial: billable utilisation %, revenue per roster hour.

• Quality: incidents per 100 shifts, satisfaction scores.

# Acceptance Criteria

• System auto-ranks staff by proximity and fit.

• Staff clock-in/out geo-fenced, timesheets auto-generated.

• Billing lines created with correct NDIS codes.

• Fortnightly unavailability required and enforced.

• Audit trail on all allocations, shifts, approvals, billing events.

# Implementation Phases

• MVP: matching & allocation, shift lifecycle, clock-in/out, timesheets, basic billing, unavailability submission.

• Phase 2: route optimisation, participant feedback, incident workflows.

• Phase 3: predictive optimisation, roster auto-packing, advanced reporting.