

Subject: NDIS Project Screenshots and Module Workflow

Hi Armin,

As per our conversation on Upwork, I've attached a few screenshots related to the NDIS project, along with a reference business workflow for one of the modules. This should help both the tech team and the client's team to better understand the module. We also take the utmost care to comply with the Australian business standards and government agencies.

We are registered a company in Australia, Scriptify Pty Ltd, based in Adelaide. We are team of 4 people in Australia and we have our own development offices in India, (Employed to Indian Entity and Not freelancers), where a team of 16 developers works across a range of projects, including web development, mobile apps, CRM, ERP, TV-based platforms, and digital signage.

Feel free to visit our websites:

- <https://business.au>

- <https://teeveenxt.com>

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You can reach us at: admin@bizness.au

Mobile: 0493732343

Thank you for your time, and I look forward to any feedback you may have.

Please share your contact details to above email or phone number so that we can communicate further.

Best regards,

Sailesh

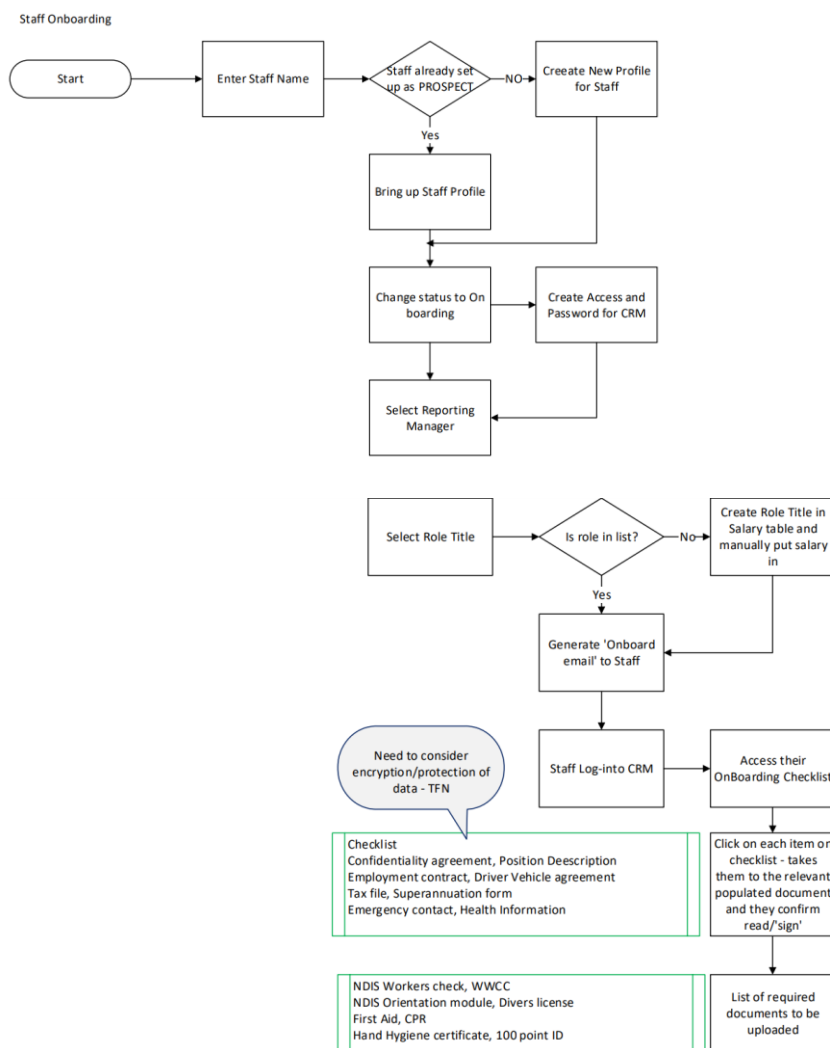
Health Care and Age Care – CRM+Payroll

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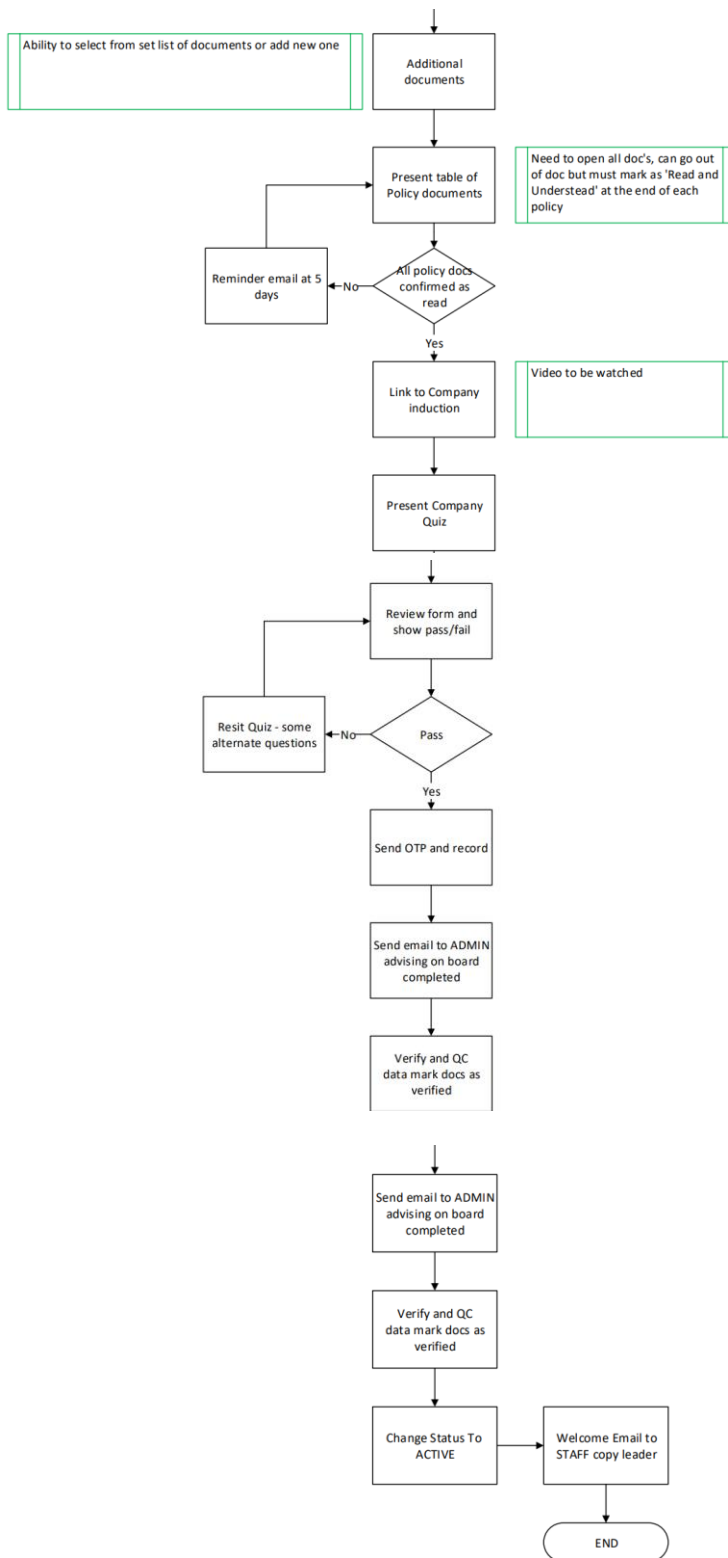
SUPPORT WORKER / STAFF



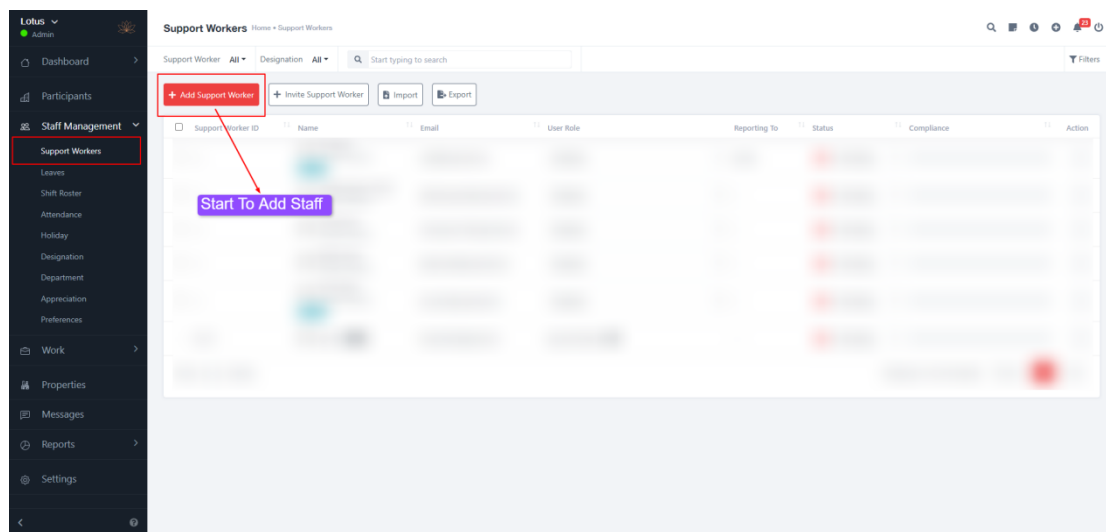
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1. Start :-



2. Enter Staff Name :-

Lotus Admin

Add Support Worker

Account Details

Support Worker ID: 7 Salutation: -- Support Worker Name: e.g. John Doe Support Worker Email: e.g. johndoe@example.com Profile Picture: Choose a file

Date of Birth: Select Date Designation: -- Department: --

Country: Afghanistan Mobile: +93 e.g. 1234567890 Gender: Male Joining Date: 07-08-2024

Reporting To: -- Language: Demo User Role: Employee

Address: e.g. 132, My Street, Kingston, New York 12401

About:

Other Details

Reporting To: Status: Compliance:

On Borading

On Borading

On boarding successfull

On Borading

3. Create New Profile for Staff :-

Add Support Worker

Account Details

Support Worker ID: 7, Salutation: --, Support Worker Name: e.g. John Doe, Support Worker Email: e.g. johndoe@example.com, Profile Picture: Choose a file

Date of Birth: Select Date, Designation: --, Department: --

Country: Afghanistan, Mobile: +93 e.g. 1234567890, Gender: Male, Joining Date: 07-08-2024

Reporting To: --, Language: Demo, User Role: Employee

Address: e.g. 132, My Street, Kingston, New York 12401

About:

Other Details

4. Bring up Staff Profile :-

carens joe Home > Support Workers > carens joe

Profile | Compliance | Read & Signature | Tasks | Leaves | Leaves Quota | Timesheet | Documents | Emergency Contacts | Appreciation | Shift Roster | Permissions | More

Mr carens joe
Support Workers • Support Workers | User Role: Employee
Last login at 07-08-2024 10:04 pm
Inactive

Open Tasks	Projects	Hours Logged	Tickets
0	0	0	0

Profile Info

Support Worker ID	7
Full Name	carens joe
Designation	Support Workers
Department	Support Workers
Gender	Male
Work Anniversary	Today
Date Of Birth	07 July
Email	carens@yopmail.com
Mobile	+61784561230
Slack Member ID	--
Hourly Rate	\$
Address	--

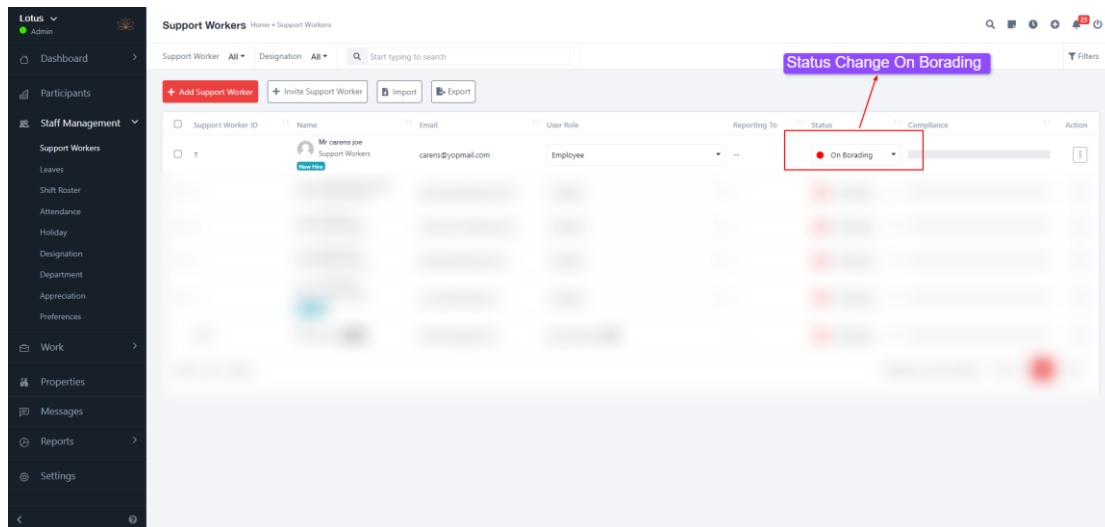
Appreciation
No record found.

Reporting To: -- Reporting Team: --

Late Attendance: 0 Leaves Taken: 0

Tasks
Not enough data.

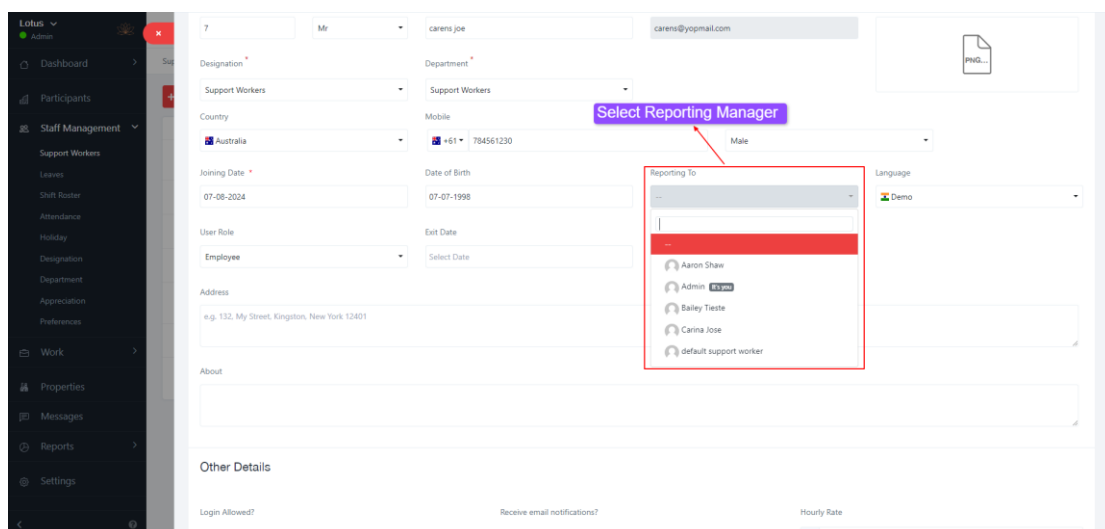
5. Change status to On boarding :-



6. Create Access and Password for CRM :-

Access And Password Send To Staff In Email

7. Select Reporting Manager :-



8. Select Role Title :-

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9. Create Role Title in Salary table and manually put salary in :-

10. Generate 'Onboard email' to Staff :-

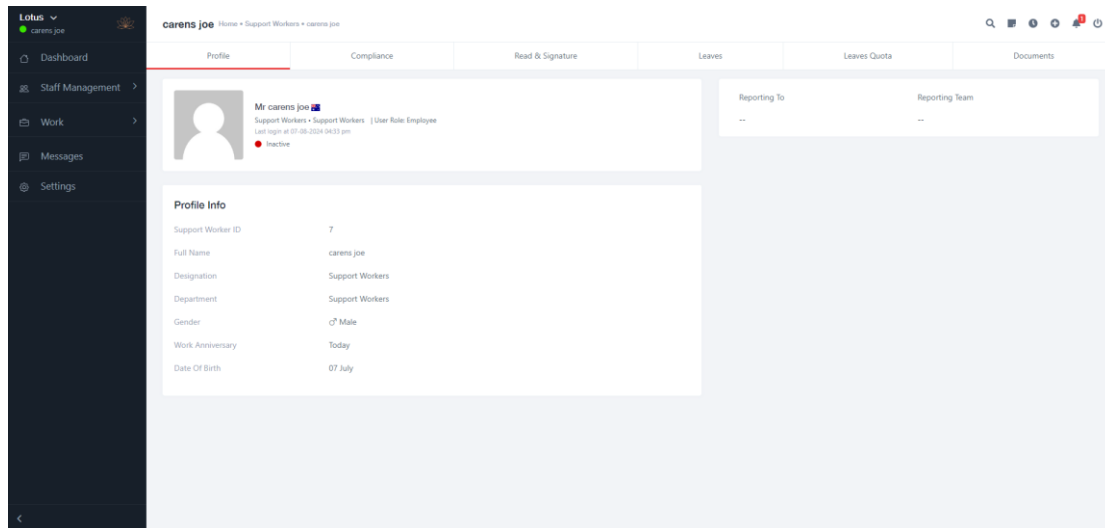
On Board Email Send To Staff

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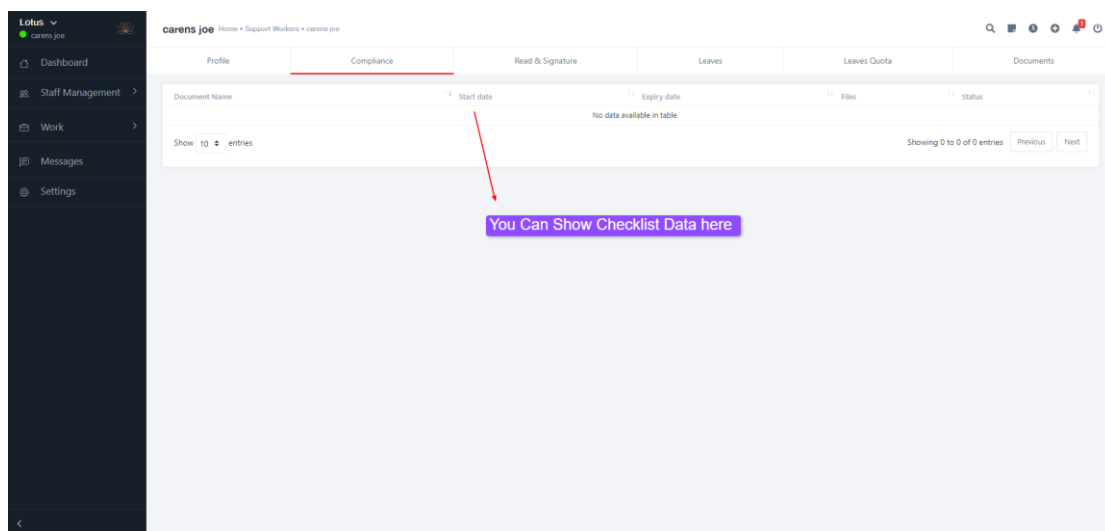
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11. Staff Log-into CRM :-



12. Access their OnBoarding Checklist :-

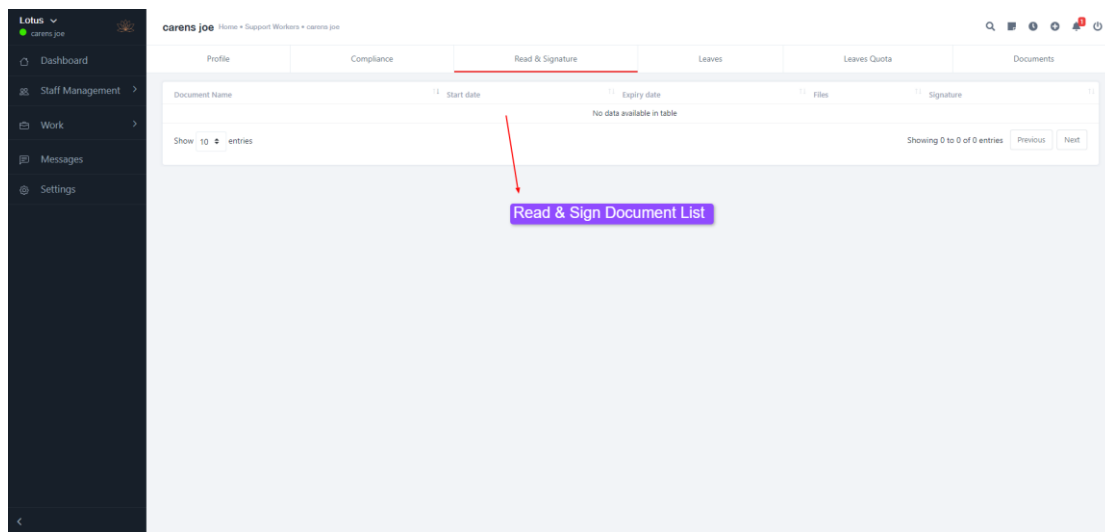


13. Click on each item on checklist - takes them to the relevant populated document and they confirm read/'sign' :-

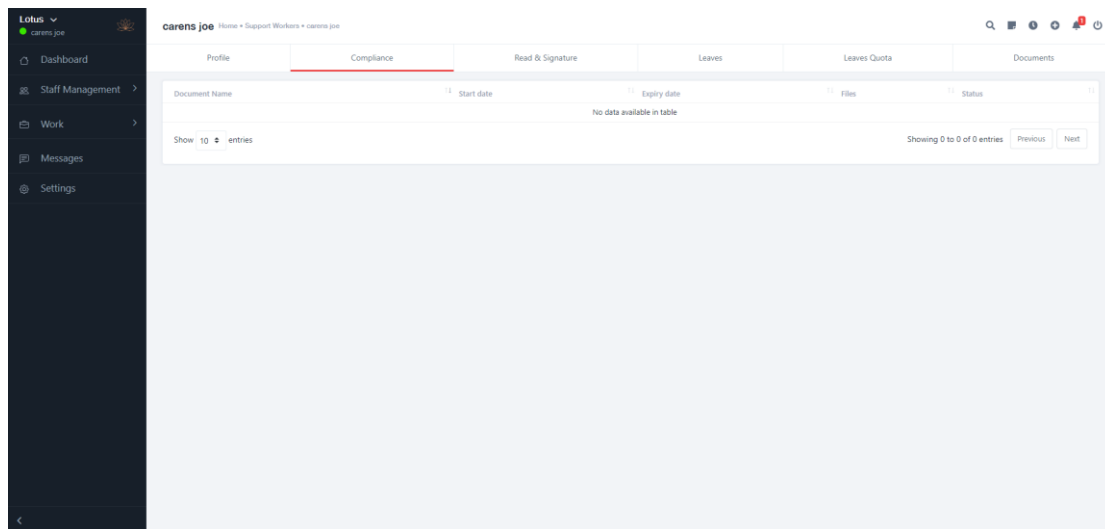
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14. List of required documents to be uploaded :-

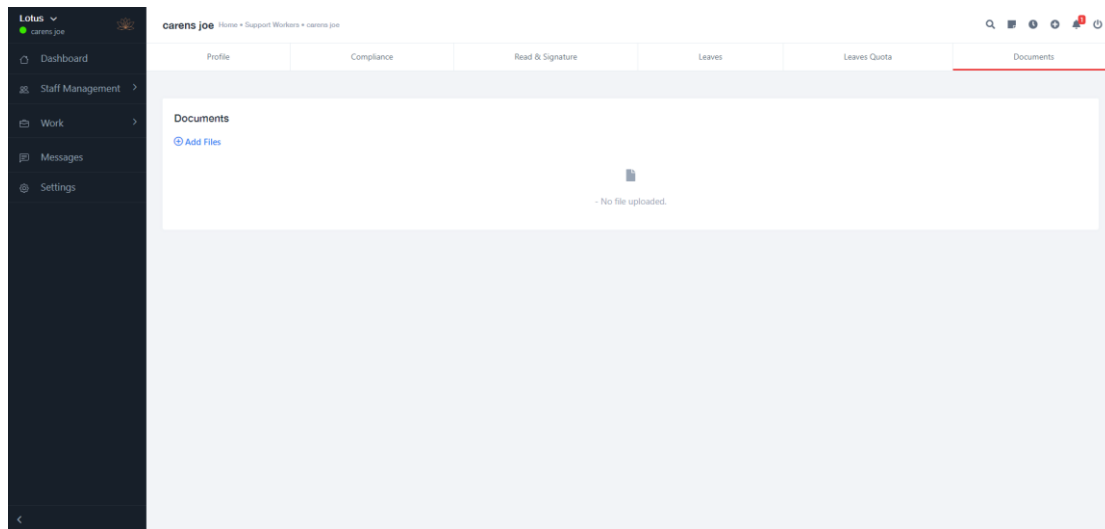


15. Additional documents :-

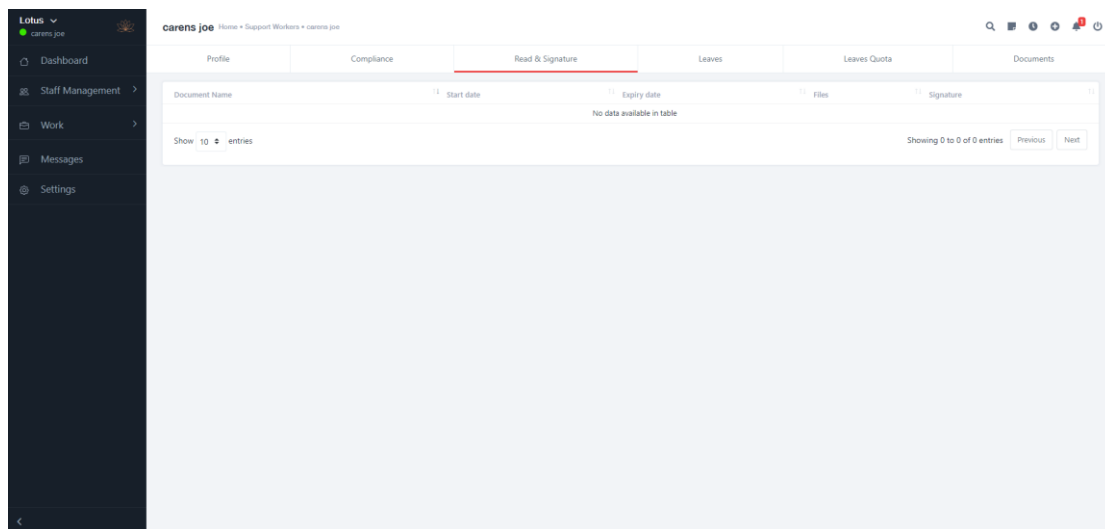
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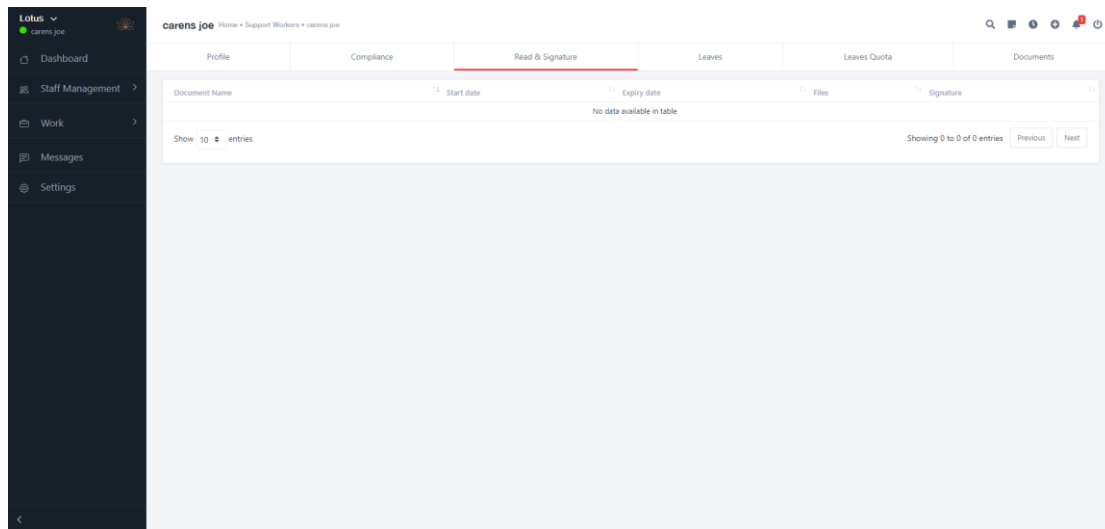
Screenshots shared are for reference only as it might change due to further development in any of the modules



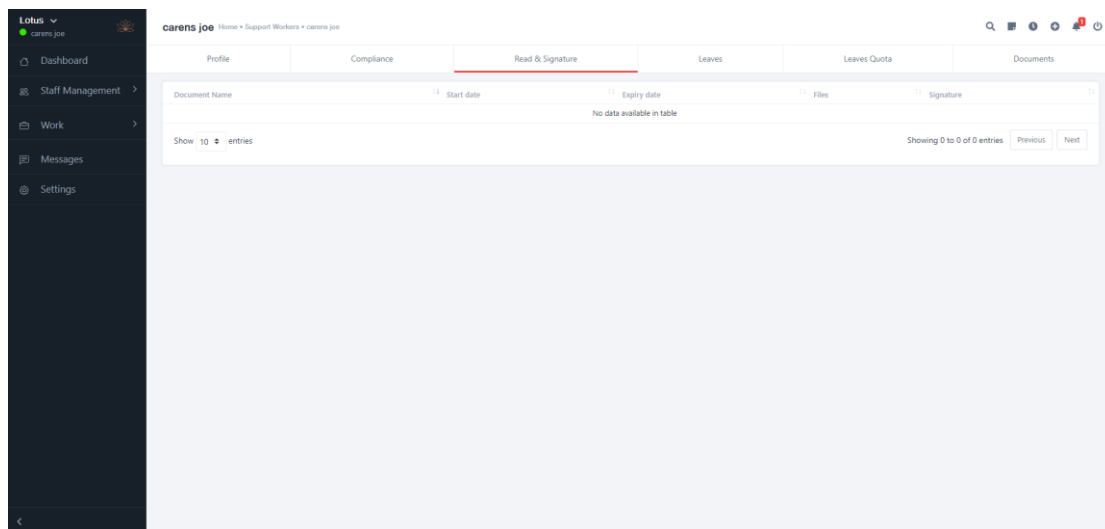
16. Present table of Policy documents :-



17. All policy docs confirmed as read :-



18. Link to Company induction :-



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PARTICIPANTS

Enter Name – Participants

The screenshot displays the 'Participants' management page. On the left is a dark sidebar with navigation links: Dashboard, Prospects, Participants (active), Staff Management, Work, Finance, Programs, Tickets, Events, Properties, Messages, Notice Board, Knowledge Base, Payroll, and Reports. The main content area has a header with 'Participants' and a breadcrumb 'Home > Participants'. It includes a search bar, a filter dropdown set to 'All', and buttons for '+ Add Participant', 'Import', and 'Export'. Below this is a table with columns: #, Name, Email, Status, Compliance, Created, Updated, and Action. The table lists 10 participants, including 'Mr new test client user', 'testing', 'new Participant', 'Miss drashti', 'priya test demo', 'Case Manager Case Manager Case M', 'client new Participant', 'UserSkill', 'preferneect skill', and 'skil test'. Each row shows a status (e.g., 'On boarding successfully' or 'On boarding') and a compliance progress bar. The bottom of the table shows 'Showing 1 to 10 of 24 entries' and pagination controls (Previous, 1, 2, 3, Next).

#	Name	Email	Status	Compliance	Created	Updated	Action
1	Mr new test client user	client2805@yopmail.com	On boarding successfully	07.64	05-08-2024	06-08-2024	
2	testing		On boarding		31-07-2024	06-08-2024	
3	new Participant		On boarding successfully		30-07-2024	05-08-2024	
4	Miss drashti	drashti2805@yopmail.com	On boarding		27-07-2024	05-08-2024	
5	priya test demo	priyadubey20032@gmail.com	On boarding		25-07-2024	05-08-2024	
6	Case Manager Case Manager Case M	testparticipant29@yopmail.com	On boarding successfully		23-07-2024	05-08-2024	
7	client new Participant		On boarding		22-07-2024	05-08-2024	
8	UserSkill		On boarding		19-07-2024	19-07-2024	
9	preferneect skill		On boarding		19-07-2024	19-07-2024	
10	skil test		On boarding		19-07-2024	19-07-2024	

Create New Profile for – Participants

Step-1 Add Account Details for Participants

Add Participant

Account Details | Individual Address | Guardian Information | Authorised Information | NDIS

Salutation: --

Participant Name: *
First Name: First Name
Middle Name: Middle Name
Last Name: Last Name
Email: e.g. johndoe@example.com

Date of Birth: --
Country: e.g. John Doe
Mobile: First Name
Choose a file

Middle Name: Middle Name
Last Name: Last Name
Email: e.g. johndoe@example.com
Choose a file

Date of Birth: Select Date
Country: Afghanistan
Mobile: +93 e.g. 1234567890

Gender: Male
Change Language: Demo
Participant Category: -- Add
Participant Sub Category: -- Add

Login Allowed?: ☐ Yes ☒ No
Receive email notifications?: ☒ Yes ☐ No
Case Manager: --
Case Manager 2: --

Step-2 Add Individual Address for Participants

Add Participant

Account Details | Individual Address | Guardian Information | Authorised Information | NDIS

Individual Address House Number: Individual Address House Number
Address Line 1: Address
Address Line 2: Address
Suburb: Suburb

State: e.g. California, Rajasthan, Dubai
Postcode: Postcode

Individual Address House Number: Individual Address House Number
Address: Address
Address: Address
Suburb: Suburb

State: e.g. California, Rajasthan, Dubai
Postcode: Postcode

Step-3 Add Guardian Information for Participants

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Demo Company ...

Admin

Dashboard

Prospects

Participants

Staff Management

Work

Finance

Programs

Tickets

Events

Properties

Messages

Notice Board

Knowledge Base

Payroll

Reports

Add Participant

Account Details

Individual Address

Guardian Information

Authorised Information

NDIS

Guardian Key Contact Person

Guardian address house number

Guardian address line 1

Guardian address line 2

Guardian suburb

Guardian state

Guardian postcode

Guardian mobile phone number

Guardian Key Contact Person

Guardian address house number

Address

Address

suburb

state

1234

1234567896

Guardian Key Contact Person

Guardian address house number

Address

Address

suburb

state

1234

1234567896

Save

Save & Add More

Cancel

Step-4 Add Authorised Information for Participants

Demo Company ...

Admin

Dashboard

Prospects

Participants

Staff Management

Work

Finance

Programs

Tickets

Events

Properties

Messages

Notice Board

Knowledge Base

Payroll

Reports

Add Participant

Account Details

Individual Address

Guardian Information

Authorised Information

NDIS

Is authorised to make legally binding agreements

Authorised person name

Primary emergency contact person name

Primary emergency contact person mobile number

Primary authorised to pick up from program

Secondary emergency contact person name

Secondary emergency Contact Person mobile number

Secondary authorised to pick up from program

Relationship to participant

First Visit Check In

Yes

Authorised person name

Person name

1234567896

Yes

Person name

1234567896

Yes

Yes

Parent

Select Date

Yes

Authorised person name

Person name

1234567896

Yes

Person name

1234567896

Yes

Yes

Parent

Select Date

Save

Save & Add More

Cancel

Step-5 Add NDIS for Participants

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Add Participant

Account Details Individual Address Guardian Information Authorised Information **NDIS**

Plan Number Plan Start Date Plan End Date Friend Need

Overnight Support Ndis fund managing style Is under guardianship Sacat in place

Family court info

Save Save & Add More Cancel

Admin can View, Edit, Delete Participants Profile information

Participants Home • Participants

Added On Start Date To End Date Participant All Start typing to search Filters

+ Add Participant Import Export

#	Name	Email	Status	Compliance	Created	Updated	Action
1	Mr new test client user	client2805@yopmail.com	On boarding successfully	17.64	05-08-2024	06-08-2024	View Edit Delete
2	testing		On boarding		31-07-2024		
3	new Participant		On boarding successfully		30-07-2024		
4	Miss drashti	drashti2805@yopmail.com	On boarding		27-07-2024	05-08-2024	
5	priya test demo	priyadubey20032@gmail.com	On boarding		25-07-2024	05-08-2024	
6	Case Manager Case Manager Case M	testparticipant29@yopmail.com	On boarding successfully		23-07-2024	05-08-2024	
7	client new Participant		On boarding		22-07-2024	05-08-2024	
8	UserSkill		On boarding		19-07-2024	19-07-2024	

Edit Participants Profile information

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Demo Company ...
Admin

Dashboard

Prospects

Participants

Staff Management

Work

Finance

Programs

Tickets

Events

Properties

Messages


Update Participant

Account DetailsIndividual AddressGuardian InformationAuthorised InformationNDIS

Salutation
Mr

Participant Name *
new test client user

First Name
test

Profile Picture ?


Middle Name
user

Last Name
client

Email ?
client2805@yopmail.com

Date of Birth
06-08-2000

Country
India

Mobile
+91 9898157280

Gender
Male

Change Language
Demo

Participant Category
support Add

Participant Sub Category
subcategory Add

Login Allowed?
☒ Yes ☐ No

Receive email notifications?
☒ Yes ☐ No

Status
☒ Active ☐ Inactive

Case Manager
Case Manager 2

Bring up Participants Profile

Demo Company ...
Admin

Dashboard

Prospects

Participants

Staff Management

Work

Finance

Programs

Tickets

Events

Properties

Messages

Notice Board

Knowledge Base

Payroll

Reports

Custom Link

Settings

new test client user

Home • Participants • new test client user

Upgrade Plan

20

Profile

NDIS

Compliance

Preference

Projects

Invoices

Contracts

Credit Note

Payments

Contacts

Notes

More

Mr new test client user

Last login at 06-08-2024 02:06 pm

Total Projects

0

Total Earnings

0

Due Invoices

0

Profile Info

Full Name

Mr new test client user

First Name

test

Middle Name

user

Last Name

client

Email

client2805@yopmail.com

Password

--

Mobile

+919898157280

Gender

Male

GST/VAT Number

--

Language

Demo

Added By

Admin

Individual Address

Individual Address House Number

e-201

Address Line 1

surt

Address Line 2

tpi

Suburb

sdfsdff

State

sdfdf

Postal Code

2252

Guardian Information

Guardian Key Contact Person

demo

Guardian Address House Number

e-21

Guardian Address Line 1

surt

Guardian Address Line 2

ssrs

Guardian Suburb

jnjnjin

Guardian State

njknjnjin

Guardian Postcode

564464

Guardian Mobile Phone Number

3698521478

Authorised Information

Is Authorised To Make Legally Binding Agreements

yes

Authorised Person Name

fdgdfg

Primary Emergency Contact Person Name

sdfsdff

Primary Emergency Contact Person Mobile Number

147852369

Primary Authorised To Pick Up From Program

no

Secondary Emergency Contact Person Name

sfsf

Secondary Emergency Contact Person Mobile Number

14785236985

Secondary Authorised To Pick Up From Program

yes

Relationship To Participant

parent

First Visit Check In

01-08-24

Projects

- Not enough data -

Invoices

- Not enough data -

Change status to on boarding by Default when New Participants Created.

Participants Home • Participants

Added On Start Date To End Date Participant All Start typing to search Filters

+ Add Participant Import Export

#	Name	Email	Status	Compliance	Created	Updated	Action
1	Mr new test client user	client2805@yopmail.com	On boarding	17.5%	05-08-2024	06-08-2024	
2	testing		On boarding		31-07-2024	06-08-2024	
3	new Participant		On boarding successfully		30-07-2024	05-08-2024	
4	Miss drashti	drashti2805@yopmail.com	On boarding		27-07-2024	05-08-2024	
5	priya test demo	priyadubey20032@gmail.com	On boarding		25-07-2024	05-08-2024	
6	Case Manager Case Manager Case M	testparticipant29@yopmail.com	On boarding successfully		23-07-2024	05-08-2024	
7	client new Participant		On boarding		22-07-2024	05-08-2024	
8	UserSkill		On boarding		19-07-2024	19-07-2024	

Primary contact logs in and starts On boarding checklist

Participants Login Page

Login to the Participants Panel

John Deo Home • Participants • John Deo

Profile NDIS Compliance Preference Projects Invoices Contracts Estimates Credit Note Payments Notes More

Mr John Deo Last login at 06-08-2024 05:52 pm

Total Projects 0

Total Earnings 0

Due Invoices 0

Profile Info

Full Name Mr John Deo

First Name John

Middle Name deo

Last Name

Email client2805@yopmail.com

Password --

Mobile +919898157280

Gender ♂ Male

GST/VAT Number --

Language Demo

Projects

- Not enough data -

Invoices

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