



Kinovo

FREE PRINTABLE RESOURCE

Care Team Clarity Starter Pack

A calm, practical set of worksheets for a participant, family and invited professionals to build one useful shared picture - without rebuilding every record.

Use it to answer four care-team questions

- ? What matters now?
- ? What changed?
- ? Who owns the next step?
- ? What is waiting, and where is the current information?

Print the whole pack or just the worksheet you need. Use fictional initials if a printed copy may be seen by others.

Useful without a Kinovo account. Start with one current priority, not a large setup exercise.

Build one useful shared starting point

This is a short coordination exercise, not a request to recreate every note or record. Choose one current priority and stop when the next useful step is clear.

0-5 minutes

Choose the starting point

- ☐ Name the person or care-team workspace this sheet is for.
- ☐ Choose one current priority that would help the team now.
- ☐ Write one sentence about what good progress would look like.

5-10 minutes

Capture the current shared picture

- ☐ Note what changed or what the team needs to know now.
- ☐ Point to the current document or information source; do not copy every record.
- ☐ Mark anything that should stay in a professional, provider or clinical system.

10-15 minutes

Make the next step visible

- ☐ Give the next action one owner.
- ☐ Add a due date or a date to check again.
- ☐ Write what the action is waiting on, if anything.

15-20 minutes

Invite contribution, then review

- ☐ Choose one person who can contribute a useful document, response or update.
- ☐ Explain why they are being invited and what access they need.
- ☐ Set the next short check-in date. Leave the rest for later.

Done is deliberately small: one priority, one owner, one next date and one useful invitation.



The current shared picture

Capture only what the invited care team needs to coordinate the current priority. Keep formal case notes, clinical records and provider records in their required systems.

Person / workspace: _____

Date updated: _____

1. What matters now?

Write one current priority in plain language.

2. What changed?

Record the change, decision, completed work or new question the team should know.

3. What current information helps?

Point to the useful summary, document or instruction and say where the current version lives.

4. What is the next useful outcome?

Describe the next visible step - not the whole plan.

Time-sensitive coordination item (not an emergency): _____ Check by:

Who owns the next step?

Give each action one clear owner. If something is waiting, name what it is waiting on and when somebody will check again. Ownership here means coordination responsibility, not clinical or legal responsibility.

Current priority: _____

Next step	Owner	Due / check	Waiting on	Latest update
Example: request current progress summary	Jordan (SC)	12 Aug	Provider response	Requested 4 Aug

Useful status words Ready | In progress | Waiting | Needs review | Complete

At the next check-in, update the owner, waiting reason or next date rather than adding a second copy of the same action.

Plan review / reassessment evidence tracker

Use this page to coordinate reports, examples, requests and follow-up that your team has already identified as relevant. It is not a checklist of what the NDIA will require.

Important: this tracker is deliberately non-exhaustive.

Relevant information depends on the person's circumstances and the current process. Check current official guidance and ask the appropriate professional or NDIA contact where needed.

Question / area	Relevant item or example	Contributor	Requested / due	Current location / next check
Example: current goal progress	Recent practical examples and agreed summary	Family + allied health	Asked 4 Aug	Current report folder; check 12 Aug

Before sharing: confirm the item is current, relevant to the agreed purpose and appropriate for the people who will receive it. Keep professional records in the professional's required system.

Who should be invited - and why?

Invite a person because they can contribute something useful to the shared work. Access should fit that purpose and can be reviewed later.

Team leader - the person trusted to manage access and shared oversight. Participant-controlled does not mean the participant must maintain every item; invited people can contribute their own part.

Person / organisation	Why invite them?	What can they contribute?	Access needed	Who asks / when
Example: Sam, OT	Current goal context and requested report	Relevant update and current document	Goals + documents	Claire, 6 Aug

- ☐ Does this person need an account now, or can the Team leader add the missing item first?
- ☐ Have we explained what the workspace is for and what should stay in another system?
- ☐ Is the access limited to what this person needs to contribute?



A short weekly care-team check-in

Use this in a meeting, message thread or shared document. Keep updates concise and point to the current record rather than copying formal notes.

Week / date: _____

People contributing: _____

1. What changed since the last check-in?

2. What is the most useful current priority?

3. What moved forward or was completed?

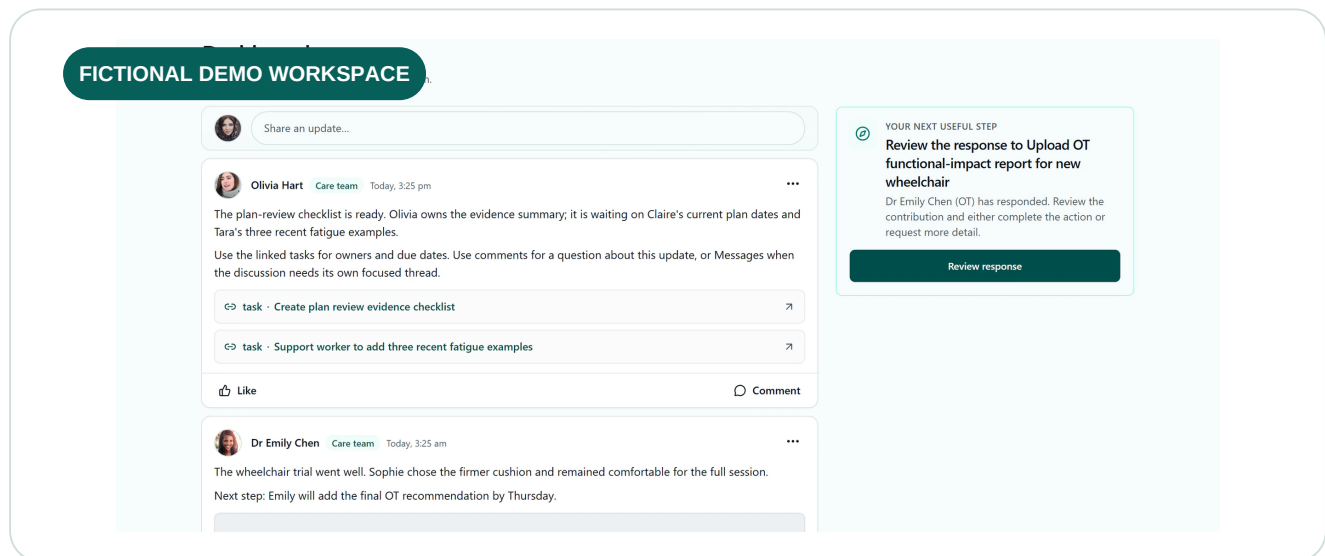
Next action	Owner	Due / next check	Waiting on / context

Current information updated or replaced: _____

Access or invitation to review: _____

How the same ideas appear inside Kinovo

The pack works on its own. If the care team wants a live shared workspace later, Kinovo keeps these same coordination ideas visible to the participant, family and invited professionals.



Current shared picture

Overview, goals and Important information keep useful context findable.



Owner and waiting

Actions show who owns the next step, its status, due date and waiting context.



Relevant evidence

Documents and goals point the team to current shared information without replacing formal records.



Purposeful invitations

The Team area supports separate access for each invited contributor.



Weekly check-in

Messages and activity let people add concise updates relevant to their part.

Kinovo is free during the MVP. No payment card required.

Create a workspace, join by invitation or explore first at kinovo.com.au