

What do we need the tool to do?

Complete this together before comparing products. Start with one recurring problem and the participant's preferences.

Participant / chosen supporters / date:

The recurring coordination problem, with one example:

What a better result would look like:

Who needs to contribute, and who only needs an update:

Participant's preferences for involvement and sharing:

Devices, accessibility and communication needs to try:

Our three essential requirements:

Information each role actually needs to see:

Who can manage access, and how changes will be checked:

Existing provider systems we still need to use:

Who will maintain each type of information:

Acceptable cost, including time and any team-member fees:

What we need to keep or retrieve if we stop using the tool:

Our simplest workable option to try first:

Optional coordination tool. Not an NDIA form, clinical instruction or funding approval.
Store completed copies appropriately and share only with the people who need them.
Full guide and official sources: <https://www.kinovo.com.au/resources/ndis-care-coordination-app-checklist>

Compare one option fairly

Copy a card for each option. Use meets / partly meets / does not meet / unknown. Record what you actually checked; an unknown stays open.

Option / version or plan checked / date:

Requirement 1 / result / evidence from the trial:

Requirement 2 / result / evidence from the trial:

Requirement 3 / result / evidence from the trial:

Participant and team accessibility check / result:

Who can invite, view, change and remove access:

Privacy, storage and support questions still unanswered:

How we tested finding the current document:

How we tested a task owner, reply and completion:

Notification settings / what still needs a direct call:

Provider systems or records it cannot replace:

Costs, account requirements and cancellation terms checked:

How we would retrieve our information and leave:

Decision / reason / unresolved essential requirement:

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Try one real task for a week

Begin with a fictional example to test access. If it works, agree a small real trial using only the information and people needed.

Trial dates / people who have agreed to participate:

Participant's chosen priority:

One task we will complete or clarify:

Task owner who has accepted it / agreed check-in:

Current document needed / appropriate access checked:

Where the official provider record still belongs:

Who will update the task and the document:

How someone will ask for help using the tool:

What happened / how much extra chasing was needed:

Could the participant find or receive the agreed update?

Could each person find the right information?

What still caused confusion or duplicated work:

Decision: keep / adjust / stop, and why:

Next step / owner / date, including access cleanup:

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