

Current-document index card

Copy one card per useful document. The index tells people where the right file is; it does not require everyone to have a copy.

Document title and what it is used for:

Author / issuing service:

Date on the document / version, if supplied:

Status: current confirmed / draft / superseded / needs confirmation

Who confirmed its status, and when:

Where the agreed working copy is stored:

Who holds the original or required record:

Person who has agreed to obtain updates:

Who needs this information for their role:

Participant's sharing choices / authority to clarify:

What is missing, unclear or awaiting a response:

Next action, accepted owner and check-in date:

Review date or event that should trigger a check:

Older copies: where retained and how labelled:

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/organise-ndis-documents>

Ask for the right document

Name the document, why it is needed and the agreed sharing method. Do not attach unrelated personal information to make the request look complete.

Subject: Request for [document title / current version]

Hi [name],

With [participant's] agreement, I am helping organise [specific next step].

We need [document / confirmation of the current version] for [purpose].

The copy we currently have is [title, author, date / no copy held].

Could you confirm whether this is current, or provide the appropriate version?

The agreed recipient is [person and role].

Please use [agreed secure channel / contact us to arrange one].

Let us know if you need to confirm consent or authority before sharing.

If a new report or charge would be involved, please explain this before proceeding.

Could you confirm an expected response date?

[Name] has agreed to follow up on [date].

Thank you, [name and role]

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Before sharing or replacing a file

Work through the prompts with the participant or appropriate authorised person. An organising note does not replace a required consent or provider process.

What task needs this document:

Exact recipient and role:

Information they need, and why:

Current file / version checked with:

Participant's agreement or other authority confirmed through:

Any limits on what should be shared:

Delivery method and correct address / access checked:

Who will confirm the recipient can open the file:

If replacing a file, which version becomes superseded:

Who needs to know about the new version:

Required original records and older copies retained where:

If someone's role has ended, who will review workspace / link access:

Date and person recording this check:

Reminder: removing online access cannot recall copies already downloaded.

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