A2B

FREE · FOR NDIS PROVIDERS

Support Coordinator Organiser

A simple routine that stops follow-ups falling through, so handovers go smoothly.

PAGE 2

My day & week

Start and end every day the same way. Give each weekday a job.

PAGE 3

Caseload & follow-ups

Every participant, plan date and promise, on one page.

PAGE 4

Handover & Friday review

Hand over cleanly, and check the week in 15 minutes.

PAGE 4

Let's talk

Want this set up for your whole team? Message me.

1

Print a fresh copy each week. One per coordinator.

2

Use initials or an internal ID, not full participant names.

3

Store completed pages securely, like any participant record.

This organiser is a practical planning tool. It is not legal, NDIS compliance or clinical advice. NDIS rules for support coordination are changing over 2026–2028. Always check current guidance from the NDIA, the NDIS Quality and Safeguards Commission, the NDIS Pricing Arrangements and your organisation's policies.

SAME STEPS, EVERY DAY

My day

Name _____ **Date** _____

☀ Start of day · 15 min

- [ ] Check emails, messages and portal notifications
- [ ] Open the follow-up log: what's due or overdue?
- [ ] Flag anything urgent (safety, housing, a provider pulling out)
- [ ] Prep for today's calls and meetings

☾ End of day · 15 min

- [ ] All case notes for today written
- [ ] Time recorded for every participant
- [ ] Follow-up log updated, each item with a due date
- [ ] Urgent issues passed to manager or on-call

My top 3 today

1 _____

2 _____

3 _____

Golden rule: write the case note straight after each contact, and log every "I'll get back to you" right away.

AN EXAMPLE RHYTHM. CHANGE IT TO FIT YOU.

My week

Mon
PLAN
Update caseload page. Set priorities. Book calls.

Tue
PARTICIPANTS
Calls, meetings and check-ins.

Wed
PROVIDERS
Quotes, referrals, service bookings.

Thu
PARTICIPANTS
Visits and meetings. Reports in progress.

Fri
REVIEW
Notes and time done. Plan dates. Friday review.

UPDATE EVERY MONDAY

Caseload at a glance

One row per participant. Start reassessment prep early: set your own lead time.

Participant (initials / ID)	Plan end	Prep started	Next action	Due	Last contact	Status
J.S. / 1042	*30 Mar*	*☑ 2 Jan*	*Send 2 OT referrals*	*Wed*	*Mon*	*● Watch*
		☐				
		☐				
		☐				
		☐				
		☐				
		☐				
		☐				
		☐				
		☐				
		☐				

Status: ● On track · ● Watch (needs attention this week) · ● Urgent (overdue or at risk)

IF YOU SAID IT, LOG IT

Follow-up log

Raised	Participant	With whom	What's needed	Due	Done
3 Feb	*J.S.*	*OT provider*	*Quote for assessment*	*7 Feb*	☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

ONE PER PARTICIPANT

Handover

Participant

From → to

Period

Plan dates

Goals in focus

Key contacts

Open items

Risks / watch-outs

Upcoming dates

Files kept at

- [ ] Consent to share info confirmed (per policy)

EVERY FRIDAY · 15 MIN

Friday review

- [ ] All case notes written
- [ ] All hours recorded
- [ ] No overdue follow-ups (or each has a new date)
- [ ] Every participant has a next action
- [ ] Plans ending soon have prep started
- [ ] Budgets on "Watch" have a plan
- [ ] Anyone not contacted lately has a call booked
- [ ] Urgent or safeguarding issues raised

Next week's top 3

1

2

3

Want this working for your whole team?

I'm Shay. I help NDIS providers set up simple systems for routines, trackers, onboarding and audit prep. Remote and practical.

💬 Message me on WhatsApp

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