Foxtrot NDIS

Foxtrot for NDIS Providers

Overview *as at September 2023*

Introduction

Stepsoft Pty Ltd, founded in Canberra in 1998, is an independent software development company specialising in hosted ('cloud computing') online client management systems. **Foxtrot CKS (Customer Knowledge System)**, developed by Stepsoft, is at the core of our wide range of integrated online systems and services. **Foxtrot NDIS** is a purpose built version of Foxtrot CKS for NDIS Providers. Foxtrot NDIS allows NDIS Providers to manage all aspects of service delivery to NDIS Participants as well as Private Clients, including: Client Plan Management & Budget controls; Support Coordination and support delivery; support activity tracking; appointments and scheduling; rostering and timesheets; reporting & dashboards. It also includes comprehensive and fully integrated billing features to automate invoicing of Agency, Plan and Self-managed Participants, including bulk uploads of claims data to the NDIS Portal for Agency Managed Participants. Foxtrot NDIS also comes standard with comprehensive CRM (Customer Relationship Management) features to supplement your NDIS activities.

Foxtrot NDIS is provided as a 100% 'cloud computing' service and is fully and professionally managed by Stepsoft in Australia. Stepsoft utilises **Amazon Web Services** (AWS) as its hosting infrastucture. AWS is the world's leading IaaS (Infrastructure as a Service) provider ensuring that Foxtrot is available to all users 24 hours a day, 7 days a week. AWS also provides maximum scalability for Stepsoft allowing Foxtrot NDIS to be *ideal for the smallest or largest of organisations*. Whether you are operating as a sole-trade managing a few Participants or whether you have hundreds of staff and manage hundreds or thousands of Participants makes no difference from a systems point of view to Foxtrot. The system will handle all sizes. Pricing is based on equity, so smaller organisations with less staff will pay less. A flexible pricing policy also ensures that you only pay for what you need.

Foxtrot NDIS Features

Foxtrot NDIS comes with the following standard features & modules:

Manage Participant & Client Contacts, and any other contacts

Manage all Participant details including all contact and emergency contact details, and key relationships with others such as Plan Managers, Support Coordinators, General Practitioners, etc using the Foxtrot *Relationships* module. Foxtrot NDIS can also be used to manage other types of contacts, including any other type of person, organisation or entity that you regularly deal with.

Participant & Client NDIS Plan Management

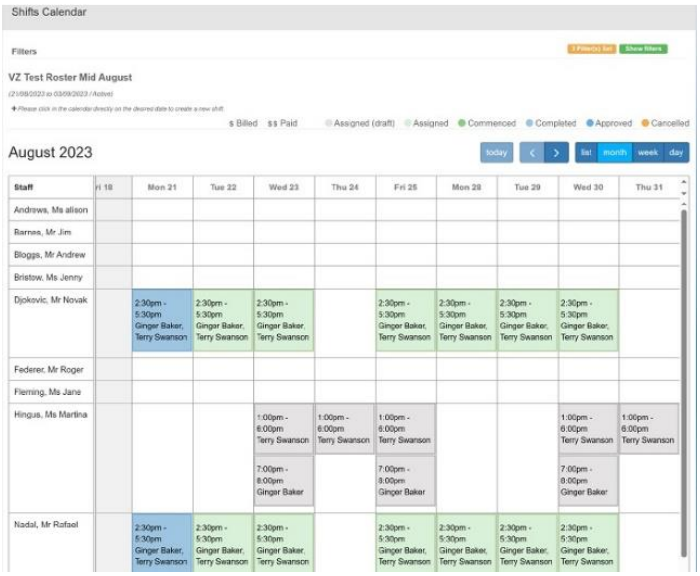
Manage NDIS Plans for Participants. Define goals and set budgets in dollars or in units at Category and Item level. Foxtrot NDIS even allows budgets and controls to be set at sub-item level for specific tasks or activities that need to be managed within the plan. Once budgets are set, the system will monitor and report expenditure against budget every time support activity is recorded against the plan. The system will also warn when a budget is approaching overspend and prevent over-spending once a budget has been exceeded.

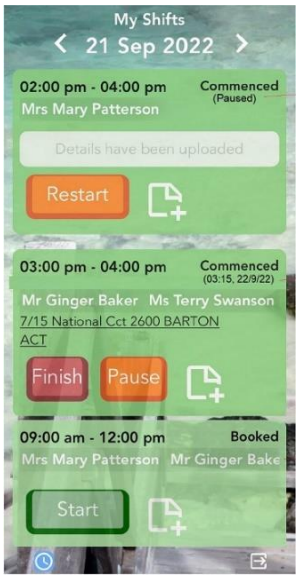
Support Notes and Task Management

Track every service delivered to a client or Participant through the system's comprehensive File Note/Support Note management feature. Every support activity can be recorded as a File Note in the system, recording details of the support provided, when it was provided, the time spent, and the support worker who provided the support. The system will automatically determine the correct hourly rate to apply based on the items defined in the client plan, and by referencing its internal NDIS Price Guide. The system will also take into account past and current plans, determining the correct rate to apply based on when the service was actually delivered. The system will also automatically take into account service delivery that happens to span two client plans (the current one and the previous one), correctly attibuting and apportionting the cost to the correct plan.

Rostering and Timesheets

Quickly and easily create and disseminate work Rosters for staff, volunteers, support workers, therapists and practitioners. Staff receive their Roster notifications by email or via the online portal. Managers can set, manage and monitor tight budgets in real time as the Roster is being created. Staff and support workers can clock ON and OFF and PAUSE shifts via the companion OZShifts mobile App. Timesheets are automatically created when staff end a shift. Staff can also enter timesheets online via the OZone and managers can approve and report on timesheets with ease. Timesheets can also be transferred to Xero for payroll purposes via the Foxtrot to Xero Interface.





Appointments & Scheduling

Used by Practitioners or by Administrators to manage appointment schedules for any number of Therapists or Practitioners. Use the appointments calendar to visually create new bookings that are automatically linked to NDIS support items included in the client's plan. Record attendance and therapy notes. Send automated reminders to participants / attendees. Re-arrange schedules visually as needed. Automatically generate invoices and reimbursement claims. Run a variety of performance and other reports.

Billing of Agency, Plan and Self-Managed Participants.

Use Foxtrot's powerful but easy to use billing & invoicing processes to create and send invoices to Plan and Self-Managed Participants, and to generate a claims export file for upload to the NDIS portal for Agency Managed Participants. Create and send invoices in minutes using this time-saving feature. All information is drawn from the File/Support notes recorded in the system and the correct rates are applied. The agency managed export file complies with NDIA requirements and ensures that rejected payment claims are minimal. Once payment is received from NDIA, use Foxtrot's NDIS payment reconciliation feature to quickly and easily reconcile monies received against invoices raised and claims submitted. Rejections and the reasons for rejection can also be recorded and, after correction, claims re-submitted.

Financial Management

Foxtrot is also a comprehensive Debtors management system. Manage all of your billings, invoicing and receipting in Foxtrot, and move data into Xero periodically or in real-time. Foxtrot comes with an extensive range of financial reports and exports to help you manage your finances effectively.

Security, Privacy and Confidentiality

Foxtrot comes standard with comprehensive and flexible security features including role based security levels and the ability to define custom roles and feature sets. Foxtrot also includes multiple levels of privacy and confidentiality options to meet the legal requirements of clinical practises. Restricted Client Access (RCA) options allow administrators to, where required, restrict access by individual staff to selected clients.

Security & Audit Trails

Foxtrot includes a comprehensive and flexible security module so that access to functions and data is granted only to those who need it. Creating or disabling login accounts and setting role based access profiles is quick and easy. Custom security requirements can also be implemented by Stepsoft support staff on request. Important changes to records are also automatically logged by Foxtrot, providing an indelible data audit trail, making Foxtrot audit-proof. Foxtrot also supports Multi-Factor Authentication (MFA), which is optional at the organisation level.

Customer Relationship Management (CRM)

Foxtrot comes standard with a comprehensive set of CRM capabilities including the ability to record important contact and other details about every client and the ability to track interactions with clients. Foxtrot also comes standard with the simple to use but powerful Foxtrot Groups module which is the ideal marketing tool. Manage groups or lists or clients and other contacts for whatever purpose and send bulk email or SMS to selected groups, including e-Newsletters.

Relationships

The relationships module allows for relationships between any two customer records to be defined and maintained. This includes family relationships but can be used to maintain any important relationship including those relating to: employers, emergency contacts, GPs, sponsors, mentors, friends, volunteers, etc. Relationships can be viewed in a variety of ways. Relationships can also be added one at a time or many at a time through time saving features such as *mutli-relationship allocation.*

Online Zone (OZone) - Staff & Client Portal

Allow staff to login to the staff portal to update their own details, set availability for rosters, and interrogate their own support or appointments schedule and their own shifts and rosters. Staff can also view and add timesheets entries from within OZone.

Configurable Customer Data Module

Create new fields and forms for collecting any additional data about your customers or members. Foxtrot's unique Customer Data Module allows the system to be expanded and custom configured to suit any specific data requirements. It allows the system to be expanded quickly and easily without the hefty cost of software development. When fully implemented, Foxtot will behave and feel like custom built software.

Calendar and Tasks & Reminder Alerts

The Calendar and Tasks module provides a fully integrated calendar for setting events and defining tasks against a client or staff record. Calendars can be viewed in many different ways and reminders can be set for events and tasks as required. Reminders can be allocated to multiple staff who will each receive the reminder SMS, email or pop-up (as defined at the time of setting the reminder). The Calendar and Tasks module is also fully integrated with the exetnsive Notes features of Foxtrot.

Documents & Files

In addition to the extensive Notes features, Foxtrot allows for any document, image, audio or video file to be attached to a client/customer record. This allows for as much information as required to be stored against a client. Some examples may include: scanned copy of residency visa, qualifications evidence, health certificates, client photos, client contracts, site photos and videos, etc.

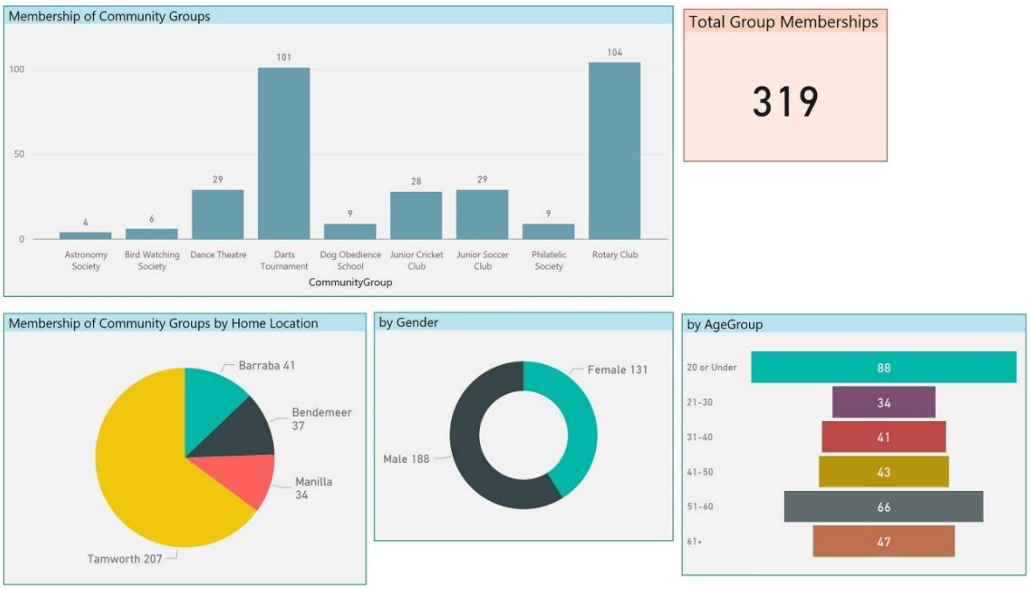
Foxtrot Sharing

This optional module of Foxtrot is an online service that allows for staff and other registered users or stakeholders to upload and share information with each other in a completely secure way. Access is restricted according to a user's security profile, and any type of information can be shared online. Such information could include: documentation, manuals, policy documents, board minutes, meeting minutes, photos, videos, etc. The nature of the material uploaded is up to the the host organisation's administrators and to users of OZone. The OZone can also be configured by region or location or other category and access rights restricted in accordingly. Data audit trails are also maintained on all information uploaded and downloaded.

Advanced Reporting and Dashboards

Foxtrot provides a wide range of standard reports, ad-hoc query facilities, data export facilities and dashboard reports. Custom reports and dashboards are also easily created and added to the system as required. Below is an example of an existing dashboard report for one Stepsoft client. Note that dashboard dimensions can be created to suit specific requirements (e.g. revenue by month, staff hours by client, etc):

Dashboard - Sample Only



Integration with other Cloud Services

Foxtrot currently supports the following (optional) integrations and interfaces, and more are currently under development or consideration:

- Xero
- Mailchimp
- PayPal
- Securepay
- IntelliSMS

Foxtrot Research and Development

Stepsoft conducts an ongoing, comprehensive research and development program for Foxtrot and its associated Modules. All versions and modules of Foxtrot are continuously reviewed, evaluated and enhanced with new features, modules or systems to improve functionality and useability of the application. There are many exciting projects currently underway and soon to be released into the Foxtrot application.

Contact

For more information about **Foxtrot** or **Stepsoft** please contact the Managing Director,
Victor Zappia by email to vzappia@stepsoft.com.au, or phone the office on +61 2 6233 0900, or send an email to enquiries@stepsoft.com.au

www.stepsoft.com.au