

Log activities, referrals and reports

Log billable and non-billable activities, send referrals to providers and read the email they received, and create stored reports for a participant.

WHO IT IS FOR Owner, Admin, Manager, Coordinator	TIME NEEDED About 18 minutes	LAST REVIEWED 14 October 2026
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Who this is for

Permissions: To open a participant's Activities, Referrals and Reports tabs, view and download a report, and use **View email** you need **Can view support coordination**. To log or change an activity, send an email, add, send or change a referral, and create, email or delete a report you also need **Can manage support coordination**. Without it you see the same tabs with the buttons that save things left out, and a referral or an activity opens to read only.

Before you begin

- The participant is on the Support Coordination caseload and has a coordinator. See Support Coordination caseload and record.
- To bill time, the participant has an active Service Agreement with line items. See Add line items.
- To send a referral, you know the provider's email address. You can type it when you save the referral or when you send it.



Steps

1 Go to **Support Coordination** > the participant > **Activities**

The **Activities** tab is the participant's register of case notes: every call, meeting, visit, email and piece of work you record. Billable ones also draw from the participant's budget.

- 1 In the left menu, choose **Support Coordination**, then choose the participant in the **Caseload** list. See Support Coordination caseload and record if the page is new to you.
- 2 Choose the **Activities** tab. The filter above the table chooses what it lists. **All activities** lists every activity. **Billable** lists only the activities marked billable. **Unbilled** lists only the activities that are not billable, such as case notes and time that is not charged to the budget. It does not mean billable activities that have not been claimed yet. To find those, look for **Unclaimed** in the **Claimed** column.
- 3 **Send email** emails someone from here and logs the email as an activity.
- 4 **Log activity** opens the form for a new activity. **Log activity** in the participant header and **+ Log activity** on the Overview open the same form.
- 5 The table lists the activities, newest first. Choose a column heading to sort.

The screenshot shows the BondiByte Support Coordination interface. On the left is a dark sidebar with navigation options: Workspace Navigation, Platform (Dashboard), Operations (Clients, Staff, Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing), and Registers (Service Agreements, Staff Contracts, Documents, Reports, Charts). The 'Support Coordination' option is highlighted in the sidebar.

The main content area is titled 'Support Coordination' and includes a sub-header 'Manage your participant caseload and coordination activities.' It features a 'Caseload' section with a search bar, a list of participants, and a '+ Add participant' button. The participants listed are Amelia Watson, Chloe Davis, Daniel Mensah, Grace O'Connor, and Noah Bennett. Noah Bennett is selected, and his details are shown: 'Noah Bennett', 'Active', 'Coordination of Supports | NDIS No. 400000000 | DOB 2 Nov 1988 | Indooroopilly, QLD', and 'Coordinator: Emma Clarke'. Below his details are statistics: '\$365,464.41 Budget remaining of \$365,700.05, 0% used', '1 Open tasks 1 overdue', '1 Open referrals 1 awaiting response', and '198 days Plan remaining Ends 30 Apr 2027'.

The 'Activities' tab is selected, showing a table of activities. The table has columns: DATE, TYPE, SUBJECT, DURATION, BILLABLE, and CLAIMED. The activities listed are:

DATE	TYPE	SUBJECT	DURATION	BILLABLE	CLAIMED
13 Oct 2026	Email	End-of-plan reassessment report emailed Sent "End-of-plan reassessment report" (dated 12 Oct 2026) to reports@example.com as a PDF.	0 mins	No	Not billable
12 Oct 2026	Meeting	Plan review preparation with Noah and family Went through each funded support with Noah and his family and agreed what to keep, change or add before the plan review.	60 mins	Yes \$78.81	Unclaimed
10 Sept 2026	Phone call	Called plan manager about OT funding Confirmed core funding can be used for the OT assessment. Plan	30 mins	Yes \$78.02	Claimed

Choose Support Coordination (1), open the Activities tab, then use the filter (2), Send email (3) and Log activity (4). The table (5) lists the activities.



2 Read the activities table

Each row is one activity. The columns are below. The table opens sorted by **Date**, newest first, and you can sort by **Date**, **Type**, **Subject**, **Duration**, **Billable** or **Claimed** by choosing its heading.

If no activity matches the filter, the table says **No billable activities** or **No unbilled activities**, then **No activities match this filter**. **Show all activities** brings the list back. With no activities at all it says **No activities recorded yet** and suggests logging a phone call, meeting, home visit or case note.

Date: The day the activity happened.

Type: **Phone call**, **Email**, **Meeting**, **Home visit**, **Research**, **Report** or **Other**.

Subject: The subject, with the start of the case note under it.

Duration: The minutes spent, such as **60 mins**.

Billable: **Yes** with the dollar amount for a billable activity, or **No**. The **Billable** filter lists the **Yes** rows and the **Unbilled** filter lists the **No** rows.

Claimed: **Unclaimed** or **Claimed** for a billable activity, or **Not billable**. A claimed activity is locked.

Three-dot menu: If you can manage support coordination, **Edit** and **Delete**. For a claimed activity, **Edit** becomes **View** and **Delete** is greyed out, and hovering over **Delete** says **Claimed activities cannot be deleted**. If you can only view support coordination, the menu has **View** alone and no **Delete**. On a narrow window, scroll the table sideways to reach the menu.



3 Log an activity

Choose **Log activity**. The **Log activity** drawer opens on the right.

- 1 **Date** starts as today. Change it if the activity was on another day. This is required.
- 2 In **Activity type**, choose **Phone call**, **Email**, **Meeting**, **Home visit**, **Research**, **Report** or **Other**. This is required.
- 3 In **Duration (minutes)**, type whole minutes from 1 to 1440. This is required.
- 4 **Travel (km)** is optional. Type the kilometres travelled, zero or more.
- 5 **Billable** starts ticked. Untick it for time that is not charged.
- 6 In **Bill against**, choose the funded support the time is charged to. It lists each support with its hourly rate. It is required while **Billable** is ticked and greyed out when it is not.
- 7 In **Subject**, type a short subject, up to 200 characters. This is required.
- 8 In **Case note**, write what was discussed, decided or done. This is required.
- 9 Choose **Log activity**. A message confirms **Activity logged**. and the participant's tiles update.

The screenshot displays the BondiByte Support Coordination interface. On the left is a dark sidebar with navigation links: Dashboard, Clients, Staff, Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing, Support Coordination (highlighted), Service Agreements, Staff Contracts, Documents, Reports, and Charts. The main content area is titled 'Support Coordination' and includes a 'Caseload' section with a list of participants: Amelia Watson, Chloe Davis, Daniel Mensah, Grace O'Connor, and Noah Bennett. Noah Bennett is selected, showing details like 'Coordination of Supports', 'DOB 2 Nov 1988', and 'Coordinator: Emma Clark'. A budget summary shows '\$365,464.41' remaining. To the right, the 'Log activity' drawer is open, containing fields for Date (14/10/2026), Activity Type (Phone call), Duration (45 minutes), Travel (Optional), Billable (checked), Bill Against (Assistance With Self-Care Activities - Standard - Weekday Night (\$78.81/H)), Subject (Coordinated travel training referral), and Case Note (Spoke with the provider about a start date for travel training and agreed to send the referral this week). A 'Log activity' button is at the bottom right of the drawer.

Check the date (1), choose the type (2), type the duration (3) and any travel (4), keep Billable ticked (5), choose what to bill against (6), then write the subject (7) and case note (8) and choose Log activity (9).



4 Know how a billable activity changes the budget

BondiByte works out a billable activity's value as the minutes divided by 60, multiplied by the hourly rate of the support you chose in **Bill against**. At \$100.00 an hour, a 30-minute activity uses \$50.00. That amount is added to **Used** and taken from **Remaining** for that support, in the header tile and on the **Plan & Budget** tab. A not billable activity never touches the budget.

Bill against lists only supports on the participant's active Service Agreement. If there are none, it reads **No funded supports on this plan** and a billable activity cannot be saved. Untick **Billable**, or add line items to the agreement first.

To change an activity, open its three-dot menu and choose **Edit**. The drawer is titled **Edit activity** and its changes apply to the budget straight away. **Delete** asks you to confirm in a window titled **Delete activity?** Once an activity is claimed it is locked: it opens as **Activity** to read only and cannot be deleted.

Important: A billable activity reduces the participant's budget, so choose the funded support that matches the work.

5 Send an email from the Activities tab

Choose **Send email** to email a provider, planner, participant or family member without leaving the record. The **Send email** drawer says the email is sent from your organisation and logged as an activity.

To is required. **Recipient name** is optional. **Subject** and **Message** are required.

Billable starts unticked. Tick it to charge the time spent on the email. Then choose a funded support in **Bill against** and type the minutes in **Time spent (minutes)**. Both are required for a billable email.

Choose **Send email**. A message confirms **Email sent and logged as an activity**. The email appears in the table as an **Email** activity with a subject that starts **Email sent:**. If the email cannot be sent, a message says so and no activity is logged.



6 Read the Referrals table

The **Referrals** tab keeps the register of the participant's referrals. **Add referral** in the corner of the **Referrals** card opens the form, and shows only when you can manage support coordination. The table opens sorted by **Referral date**, newest first. Choose the heading of **Provider**, **Service**, **Referral date**, **Follow-up** or **Status** to sort. **Contact** and the menu column do not sort.

With no referrals the tab says **No referrals recorded yet.** and **Refer this participant to a provider and track the response here.** If you can manage support coordination, an **Add referral** button sits under it.

Provider: The provider the participant was referred to.

Service: The service type, for example occupational therapy.

Contact: The contact person's name, then the provider's email address and phone number under it. It reads **No contact details** when none were recorded.

Referral date: The day the referral was made.

Follow-up: The day you chose to check for a reply. It is blank when none was set.

Status: A coloured label: **Draft**, **Sent**, **Awaiting response**, **Accepted**, **Declined** or **Closed**. Once the referral has been emailed, the words **Sent** and the date show under the label, such as **Sent 14 Oct 2026**. They read **Sending...** while the email is going out.

Three-dot menu: The actions for the row, described in the steps below. If you can only view support coordination, it has **View**, and **View email** once an email was sent for the referral.



7 Add a referral

A referral records that you referred the participant to a provider, and what happened next. Choose the **Referrals** tab, then **Add referral**. The **Add referral** drawer opens.

- 1 In **Provider**, type the provider's name. This is required.
- 2 In **Service type**, type the service, for example occupational therapy. This is required.
- 3 In **Provider email**, type the address the referral will go to. It is optional, but it is needed to send the referral. Once a valid address is in the box, **Save and send** appears.
- 4 In **Follow-up date**, choose the day you want to check for a reply. It is optional and cannot be before the referral date.
- 5 **Status** starts as **Draft**. Leave it as **Draft** for a referral you have not sent.
- 6 **Save and send** saves the referral and emails it to the provider. Messages confirm **Referral added.** and **Referral sent to the provider.**
- 7 **Save referral** saves the referral without sending it. A message confirms **Referral added.** You can send it later from its menu.

The screenshot shows the 'Add referral' drawer in the BondiByte application. The drawer is open, showing a form for adding a referral for Noah Bennett. The form includes fields for Provider, Service Type, Contact Person, Provider Email, Phone, Referral Date, Follow-up Date, and Status. The Status is currently set to 'Draft'. At the bottom of the drawer, there are two buttons: 'Save and send' and 'Save referral'. The background shows the 'Support Coordination' interface with a 'Caseload' list and a 'Referrals' table.

Type the provider (1), the service type (2) and the provider email (3), choose a follow-up date (4) and check the status (5), then choose **Save and send** (6) or **Save referral** (7).

8 Know the other referral fields and statuses

Contact person and **Phone** are optional. **Referral date** is required and starts as today. **Notes** is optional and is included in the referral letter the provider receives.

Status can be **Draft**, **Sent**, **Awaiting response**, **Accepted**, **Declined** or **Closed**. Choose a status other than **Draft** only when the referral was handled outside BondiByte. In the table the colours are: **Draft** and **Closed** grey, **Sent** blue, **Awaiting response** amber, **Accepted** green and **Declined** red.



9 Send the referral to the provider

You can send a referral with **Save and send** when you add it, or later from its three-dot menu. The menu shows **Send to provider**, or **Resend to provider** once it has been sent.

- 1 After a referral is sent, its **Status** shows **Sent** and the date it was sent. If your window is narrow, scroll the table sideways to see **Status** and the menu button.
- 2 Choose the three-dot button at the end of the row to open the menu.

If the referral has no provider email, **Send to provider** opens a window titled **Send referral**. Type the address and choose **Send**. BondiByte keeps that address on the referral.

The screenshot shows the BondiByte Support Coordination interface. On the left is a dark sidebar with navigation options: Dashboard, Clients, Staff, Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing, Support Coordination (selected), Registers, Service Agreements, Staff Contracts, Documents, Reports, and Charts. The main area is titled 'Support Coordination' and 'Manage your participant caseload and coordination activities.' It features a 'Caseload' section with a list of participants: Amelia Watson, Chloe Davis, Daniel Mensah, Grace O'Connor, and Noah Bennett. The 'Referrals' section shows a table with columns: NAME, CONTACT, REFERRAL DATE, FOLLOW-UP, and STATUS. The status column shows 'Sent' and 'Accepted' with dates. A detailed view of a referral for Noah Bennett is shown on the right, including his NDIS number, coordinator, and a summary of budget, tasks, and referrals.

NAME	CONTACT	REFERRAL DATE	FOLLOW-UP	STATUS
el training	Alex Morgan referrals@example.com	12 Oct 2026	26 Oct 2026	Sent Sent 13 Oct 2026
upational apy ssment	Priya Nair delivered@example.com 0400 000 000	10 Sept 2026	24 Sept 2026	Accepted Sent 10 Sept 2026

A sent referral shows **Sent** and the date it was sent (1). Choose the three-dot button (2) to open its menu.

10 Know what the provider receives

The provider receives an email with a subject such as **Referral – Riverbend Community Services**, which is the word Referral and the provider's own name. It says your organisation is referring a participant to them and that the referral letter is attached as a PDF. It shows the provider and the service type, and says it was sent by your organisation using BondiByte.

The PDF letter lists the participant's name, **NDIS number**, who they are referred to, the service type and the referral date. It includes your **Notes**, asks the provider to contact you to confirm receipt and next steps, and carries your organisation's name, ABN and support email address.

Important: The referral letter includes the participant's NDIS number. Check the provider's email address before you send.

Note: Sending sets the referral's status to **Sent**, even when it was **Accepted** or **Declined** before. If the email cannot be sent, a message says **The email could not be sent.** and that the referral has not been marked as sent. You can try again.



11 Open the referral menu

- 1 Choose the three-dot button at the end of the row.
- 2 The menu lists the actions in the next step. It shows only what applies to that row. If you can only view support coordination, it lists **View**, and **View email** where an email was sent.

The screenshot shows the BondiByte Support Coordination interface. On the left is a dark sidebar with navigation links. The main content area is titled 'Support Coordination' and includes a 'Caseload' section with a list of participants. A dropdown menu is open for the participant 'Noah Bennett', showing a list of actions: 'View / edit', 'View email', 'Resend to provider', 'Mark awaiting response', 'Mark accepted', 'Mark declined', 'Close referral', and 'Delete'. The background shows a 'Referrals' table with columns for CONTACT, REFERRAL DATE, FOLLOW-UP, and STATUS. The table has two rows of data, one for 'Alex Morgan' and one for 'Priya Nair'. The status for 'Priya Nair' is 'Accepted'.

The three-dot button (1) opens the referral menu (2).

12 Know what each referral menu item does

View / edit opens the referral in the drawer, titled **Edit referral**. Change any field and choose **Save referral**. If you can only view, the item is **View** and the fields are read only.

View email opens the email that was sent. It shows only once BondiByte has sent an email for the referral. A referral can read **Sent** without one, for example when someone set the status by hand.

Send to provider or **Resend to provider** emails the referral, as described above.

Mark awaiting response, **Mark accepted** and **Mark declined** set the status. A message confirms each, for example **Referral marked as accepted**. The menu leaves out the status the referral already has. Changing a status never emails the provider.

Close referral sets the status to **Closed** when the referral is finished. Closed, accepted and declined referrals no longer count in **Open referrals** in the header.

Delete removes the referral after you confirm in a window titled **Delete referral?** It says **This cannot be undone**.



13 View the email that was sent

Choose **View email** in a referral's menu. The **Email to the provider** window opens. BondiByte keeps a copy of each referral email with the participant's record, so you can open it later and see what the provider received.

- 1 If the referral was sent more than once, **Emails** lists each email by date and time, with the newest marked **(latest)**.
- 2 The **Email** section shows **To**, **Subject**, a time and the delivery status.
- 3 **Message** shows the email as the provider received it. Scroll down to see all of it. If the message itself was not kept, it says **The message text was not stored**.

Close at the bottom shuts the window. If the email cannot be loaded, the window shows the problem with a **Try again** button.

The screenshot shows the BondiByte interface with a sidebar on the left containing navigation links like Dashboard, Clients, Staff, Rostering, Sites, etc. The main content area is titled 'Support Coordination' and 'Email to the provider'. It features a dropdown menu for 'Emails' with the latest entry '13 Oct 2026, 10:56 am (latest)'. Below this is an 'EMAIL' section with fields for 'To' (referrals@example.com), 'Subject' (Referral - Riverbend Community Services), 'Created' (13 Oct 2026, 10:56 am), and 'Delivery status' (Not delivered. The email was not delivered because email delivery is not switched on.). The 'MESSAGE' section shows a preview of a referral letter from 'Demo Organisation' to 'Riverbend Community Services'. The window has a 'Close' button in the top right and bottom right corners.

Choose an email (1) if there is more than one. The Email section (2) gives the recipient, subject, time and delivery status. The message (3) is shown as the provider received it. The referral letter is under the message.



14 Read the delivery status and the attachment

The time reads **Sent** when the email was handed to the mail service, and **Created** when it was not. Under **Message, Attachments** lists **Referral letter (PDF)**. **Download** saves it and confirms **Referral letter downloaded**. A line under it says which letter you are getting. For an email with a kept copy of its letter, when the time reads **Sent** it says **This is the letter as it was sent**. When the time reads **Created**, because the email never went out, it says **This is the letter that was attached to this email**. Emails from before copies were kept read differently, as described below.

The delivery status is one of these. **Waiting to be sent. Being sent. Waiting to try again after a temporary problem. Sent, delivery not yet confirmed. Delivered to the recipient's mailbox. Could not be sent. Bounced, the recipient's address did not accept it. Delivered, then marked as spam by the recipient. Not sent. Sending was blocked for this email.** Or, when email delivery is switched off, **Not delivered. The email was not delivered because email delivery is not switched on.**

After 90 days the delivery record behind the status is cleared, but the copy of the email stays. The label then reads **Status when sent**, or **Recorded status** if the email was never sent, with a line saying later delivery updates are not shown.

If the email had no attachment, **Attachments** says **This email had no attachment**.

A referral emailed before BondiByte began keeping a copy of each email behaves in one of two ways, depending on how long ago it was sent. If it was sent less than 90 days ago, **View email** still shows it. Under **Attachments**, the line reads **The letter is produced from the referral as it stands now, so it may differ from the copy that was emailed if the referral has been edited since.** and **Download** gives the letter as the referral reads today, not as it was sent. For an older email that never went out, the line says it may differ from **the letter that was attached to this email**. If it was sent more than 90 days ago, nothing is left to show, and the window says **No stored copy of this email was found. Stored emails are kept for 90 days, then removed.**

Important: The screens in this guide come from a demonstration workspace where email delivery is switched off, so no email is really delivered there. The status reads **Not delivered**, the time reads **Created** and the line under the attachment reads **This is the letter that was attached to this email**. In a workspace where delivery is on, the time reads **Sent**, that line reads **This is the letter as it was sent**. and the status moves through **Sent, delivery not yet confirmed** to **Delivered to the recipient's mailbox**.



15 Create a report

A report draws the participant's plan, budget, goals, referrals, outstanding tasks and activity together into one document, as the record stands today. Choose the **Reports** tab, then **Create report**. The **Create report** window opens.

- 1 In **Report type**, choose **Initial plan implementation report**, **Mid-term progress report** or **End-of-plan reassessment report**. This is required.
- 2 **Report date** is the date shown on the report. It starts as today.
- 3 Choose **Create report**. It stays greyed out until you choose a type. A message confirms **Report created.** and the report opens for you to read.

Important: A saved report does not change after it is created. It is a snapshot of the record at that moment, with the status **Final**. To show a later position, create a new report.

Choose the report type (1) and check the report date (2), then choose Create report (3).



16 Open a report's menu

The **Reports** tab lists each report in three columns. **Report** gives the report type with its **Report date** under it. **Created** gives the date and time, with the person who created it under that. **Status** reads **Final**. Choose **Created** to sort. With no reports the tab says **No reports created yet** and **Create a report to capture the plan, budget, goals, referrals and open tasks as they stand today**. If you can manage support coordination, a **Create report** button sits under it.

- 1 Choose **Create report** to make another report.
- 2 Choose the three-dot button on a report's row. The menu lists **View**, **Download**, **View email**, **Email copy** and **Delete**. **View email** shows only once the report has been emailed. If you can only view support coordination, **Email copy** and **Delete** are left out.

The screenshot shows the BondiByte Support Coordination interface. On the left is a dark sidebar with navigation links. The main content area is titled 'Support Coordination' and includes a 'Caseload' section with a list of participants. The 'Reports' tab is selected, showing a table of reports. A report's three-dot menu is open, highlighting the 'View' option.

Support Coordination

Manage your participant caseload and coordination activities.

Caseload

My caseload (1) All participants (5)

Search participants...

☐ Include inactive

[+ Add participant](#)

Amelia Watson
Coordination of Supports
Plan ends 30 Apr 2027

Chloe Davis
Specialist Support Coordination
Plan ends 30 Apr 2027

Daniel Mensah
Support Connection
Plan ends 19 Feb 2027

Grace O'Connor
Coordination of Supports
Plan ends 30 Apr 2027

Noah Bennett
Coordination of Supports
Plan ends 30 Apr 2027

Rows: 50

[Back](#) 1-5 of 5 participants [Next](#)

Back to caseload Plan ends 30 Apr 2027 (198 days)

Noah Bennett Active
Coordination of Supports | NDIS No. 400000000 |
DOB 2 Nov 1988 | Indooroopilly, QLD
Coordinator: Emma Clarke

[Log activity](#) [Add task](#)

\$365,464.41
Budget remaining of \$365,700.05, 0% used

1 Open tasks
1 overdue

1 Open referrals
1 awaiting response

198 days
Plan remaining
Ends 30 Apr 2027

Overview Plan & Budget Activities Tasks Goals Referrals **Reports**

Reports [+ Create report](#)

REPORT	CREATED	STATUS
End-of-plan reassessment report Report date 12 Oct 2026	12 Oct 2026, 08:50 pm by Demo User	Final
Initial plan implementation report Report date 10 Sept 2026	10 Sept 2026, 08:05 pm by Demo User	
Mid-term progress report Report date 10 Sept 2026	10 Sept 2026, 07:53 pm by Demo User	

Rows: 50 [Back](#)

- View
- Download
- View email
- Email copy
- Delete

Choose **Create report** (1) to make a report. A report's three-dot menu (2) has **View**, **Download**, **View email**, **Email copy** and **Delete**.



17 Know what each report action does

View opens the report as a document. The window's title is the report type, with the participant, the **Report date** and when and by whom it was created under it. The sections are described in the next step. Three buttons sit at the bottom. **Download** and **Email copy** do the same as the menu items below, and **Email copy** shows only when you can manage support coordination. **Close** shuts the window. If the report cannot be loaded, the window shows the problem with a **Try again** button.

Download saves the report as a PDF and confirms **Report PDF downloaded**. **Delete** removes it after you confirm in a window titled **Delete report?**

Email copy opens the **Email a copy of the report** window. **To** is required. **Recipient name** is optional. **Subject** starts as the report type and the participant's name. **Message** is optional and goes above the standard note that the report is attached as a PDF. Choose **Email copy** to send it. A message confirms the copy was emailed, and the email is logged as an **Email** activity on the participant's record. That needs the participant to have a coordinator.

View email opens the **Email about this report** window. It works like the referral email window. **Attachments** lists **Report (PDF)**, with the line **This is the saved report, which does not change after it is created**.

18 Read a saved report

The report window shows the record as it stood on the day the report was created. Scroll down to see all seven sections. A value that is not recorded reads **Not recorded**.

Participant and coordinator: **Participant**, **Report date**, **Coordinator** (**Not assigned** if there is none), **Coordination level** (**Not set** if there is none) and **Generated**, the date and time the report was created.

Plan: **Plan end date**, **Days until review** and **Review due soon**, which reads **Yes** or **No**.

Budget: A line saying how much of the budget was used and how much remains, then a table with **Support item** (the name and code), **Budget**, **Used**, **Remaining**, **Used %** and **Status**, which reads **On track**, **Nearly used** or **Over budget**. With no funded supports it says **No funded supports on the participant's plan**.

Goals: **Goal**, **Status**, **Target date** and **Progress note**, plus **Progress** when a goal carries a percentage. With none it says **No goals recorded**.

Referrals: **Provider**, **Service type**, **Status**, **Referral date** and **Follow-up date**. With none it says **No referrals recorded**.

Outstanding tasks: **Task**, **Status**, **Due date**, **Priority** and **Assigned to** (**Not assigned** if there is none). With none it says **No outstanding tasks**.

Activity: **Activities logged**, **Billable** and **Claimed**, each a count of activities.



What happens next

A billable activity is now part of the participant's budget. Check **Used** and **Remaining** on the **Plan & Budget** tab. **Create claim** there gathers the unclaimed billable activities into one claim. See Support Coordination caseload and record.

A sent referral stays on the **Referrals** tab until you mark it **Accepted**, **Declined** or **Closed**. Referrals still open count in **Open referrals** in the header.

Open **View email** at any time to see what was sent for a referral or a report.

Important notes

Note: The screens in this guide show a demonstration organisation with made-up participants and providers, with email delivery switched off. Your own screens will show your participants, and your emails will show the real delivery status.

Important: The budget figures are based on the work you record in BondiByte against the participant's Service Agreement. They are not the participant's official NDIS balance.

Good practice

- Log an activity soon after the work, and write the case note so a colleague could pick up the participant without asking you.
- Tick **Billable** only for time that really is charged to the participant's funding, and choose the funded support that matches the work.
- Set a **Follow-up date** on every referral so the **Referrals** tab shows when to chase a reply.
- Check the provider's email address before you choose **Save and send**. The referral letter includes the participant's NDIS number.
- Create a report at the start, middle and end of a plan. Create a new one rather than expecting an old one to update.

Troubleshooting

Bill against shows No funded supports on this plan, or I cannot save a billable activity.

Why it happens: The participant has no active Service Agreement with line items, so there is nothing to bill against.

What to do: Untick **Billable** if the time is not charged. Otherwise add line items to the agreement first. See Add line items.

A message asks me to assign a support coordinator first.

Why it happens: An activity or an email is recorded under the participant's coordinator, and the participant has none.

What to do: Open the header menu, choose **Change coordinator**, and choose one. See Support Coordination caseload and record.



I cannot delete an activity, or **Edit** shows as **View**.

Why it happens: The activity has been claimed and is locked, so **Delete** is greyed out and **Edit** reads **View**. Or your role can only view support coordination, so the menu has **View** alone.

What to do: A claimed activity cannot be changed or deleted, so log a new activity if you need to correct the position. If the menu has no **Delete** at all, ask an Owner or Admin to check your role.

Save and send is not there.

Why it happens: The **Provider email** is empty or is not a valid address.

What to do: Type a valid address. **Save and send** appears as soon as it is valid.

A referral shows **Sent**, but **View email** is not in its menu.

Why it happens: The status was set by hand, so no email was sent through BondiByte for it.

What to do: Choose **Send to provider** if the provider still needs the referral.

View email says **Not delivered** and the time reads **Created**.

Why it happens: Email delivery is switched off for the workspace, as it is in a demonstration workspace.

What to do: In a workspace with delivery on, the status reads **Sent, delivery not yet confirmed** and then **Delivered to the recipient's mailbox**. If it reads **Could not be sent** or **Bounced**, check the address and send again.

View email says **No stored copy of this email was found**.

Why it happens: The referral was emailed before BondiByte began keeping a copy of each email, and that was more than 90 days ago. Emails from before the lasting copies are held for 90 days and then removed.

What to do: The email was sent but cannot be shown. Resend the referral to create a stored copy.

View email shows a line saying the letter is produced from the referral as it stands now.

Why it happens: The referral was emailed before BondiByte began keeping a copy of each email, less than 90 days ago. There is no copy of the letter, so it is rebuilt from the referral as it reads today.

What to do: Read the letter as the current referral. If the provider needs exactly what was sent, check the referral for later edits, or resend it to create a stored copy.

The report does not show the changes I made today.

Why it happens: A saved report is a snapshot of the record at the moment it was created.

What to do: Create a new report. The old one stays as a record of that day.

Questions and answers

Does changing a referral's status email the provider?

No. **Mark awaiting response**, **Mark accepted**, **Mark declined** and **Close referral** only change the status. Only **Save and send**, **Send to provider** and **Resend to provider** email the provider.



Does BondiByte keep the emails it sends for a referral or a report?

Yes, for every email sent since BondiByte began keeping copies. A copy is kept with the participant's record. **View email** shows it with the delivery status, the email as the recipient received it and a download for the attachment. A referral emailed before that can be shown for 90 days after it was sent, with a note that its letter is rebuilt from the referral as it stands now, and after that no copy remains.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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