PROMPT WORKS STUDIO

Chaos to calm, built to be yours.

Campbell Street Home Care

Workflow Audit

Prepared for Dianne Ashdown, Director

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> **A made-up example.** Campbell Street Home Care and its people aren't real. The software, prices, rules and pay rates in it are, as read on the dates shown.

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About me and this Audit

Who I am. I'm Chad, and I help small businesses work out where AI fits. I run my own business on Claude, so I've learned firsthand what it does well and where it needs someone checking.

What this Audit is for. To show you, job by job, what AI can take off your office's plate, what it can do with a person checking, and what should stay with your people. It's information for you to decide with.

How I work.

- You deal with me, start to finish.
- Privacy's part of every job. Client details only go into tools you've approved.
- A person in your business checks everything AI does before it goes out.
- I'll tell you when the answer is not yet, or not AI at all.
- I'll show you the options I find, including ones that aren't mine. You choose.
- I only take on a Build (where I set a job up in AI with your team) that pays for itself within 12 months, counted job by job, with your time costed at the award minimum so the saving isn't overstated.
- When I report on the AI tools your people use, I name the tools and the jobs. I don't say who uses what.
- The report is yours. Take it to anyone you like.
- It's drafted with AI, and checked and signed off by me.

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Summary

What I did. A day and a half at your Campbell Street office, on Tuesday 27 and the morning of Wednesday 28 October. I sat with you, Leah (intake), both care partners on shift and Kylie (rostering), spent 20 minutes each with Sandra (finance) and Ben (rostering), and talked with three care workers about the notes they send the office. I looked at the five office jobs that take the most time. For a provider your size, about 42 people, the Audit was quoted at $2,250. Your IT provider logged in for the look at your mail and accounts.

Your data and who checks. Clients' details, and their health details most of all, only go into tools your business has approved under its AI use policy (section 9). Every piece of AI work is checked by a named person before it goes to a client, a family or the Commission, and the check is recorded.

What I found.

- **About 35 office hours a week go on the five jobs I looked at.** Four of them (27 hours) are jobs AI can help with. The fifth, monthly statements and claims, stays in ShiftCare with Sandra.
- **AI is already in use, and one use needs to stop now.** Incident write-ups and family emails are being tidied up in a free AI tool on a personal phone, with clients' names and health details in them.
- **ShiftCare already does more than you're using.** Your Premium plan includes the Family Portal and voice-to-text notes, and ShiftCare lists AI briefings for care workers before each visit. Using them costs nothing more.
- **The rules set the terms for using AI.** The Aged Care Act limits what you do with a client's information, the Privacy Act covers you whatever your size, and the privacy regulator recommends keeping health information out of public AI tools. You don't yet have an AI use policy, and your privacy policy doesn't mention AI.
- **Deciding whether an incident is reportable, what goes in someone's plan, clinical care and the figures on a statement stay with your people.** Nothing in this report hands those to AI.
- **Your mail and accounts have 4 gaps** (the page before section 10).

Fix now (section 7). Stop client details going into the free tool. Put an AI use policy in place. Add AI and overseas storage to your privacy policy and client consent. Add the missing set details to your incident form.

Your options without me (section 8). The best for each job: the fix without AI for jobs 1, 2 and 3, and the Family Portal for job 4. Together they cost about $721 of staff time to set up and nothing a month, and give back 3.25 to 4.75 hours a week, worth $538 to $783 a month at award rates. 22.25 to 23.75 of the 27 hours are still spent.

What I can do for you (section 10). Job 3, care plan reviews, is the one I'd build, in your own Claude account. It would cost $4,350 to build, plus $1,500 to set up your Claude plan, so $5,850 up front, and about $195 a month for the plan. It gives back 2.5 to 3.5 hours a week, worth $310 to $512 a month after the plan, and the Build pays back in 8.5 to 14 months. Jobs 1, 2 and 4 don't pay back within 12 months yet, so I wouldn't take them on. Done alongside the options without me for those three, you'd get back 5 to 7.25 hours a week. The choice is yours.

1. The business today

People	Office team of 8, the people this Audit covered: Dianne (director and registered nurse, clinical lead), Megan, Josh and Trish (care partners, Trish part-time), Kylie and Ben (rostering), Leah (intake and admin), Sandra (finance and claims). About 34 home care workers in the field
Clients	About 120 Support at Home clients across Toowoomba, Highfields, Oakey and Pittsworth, mostly on classifications 3 to 6, plus a few on the restorative care pathway. About 2 new clients a week
Registration	Registered provider in categories 1, 4 and 5 (home and community services, personal and care support, and nursing)
Software	ShiftCare Premium with the Support at Home add-on (rostering, notes, incidents, budgets and statements, with claims lodged with Services Australia through ShiftCare's quickclaim link), the My Aged Care provider portal, Microsoft 365 Business Standard (Outlook, Word, Excel), Xero
Busy times	The end of each month (statements) and the weeks before each quarterly claim deadline

Rostering takes most of Kylie's and Ben's week. ShiftCare's own AI (SmartMatch and the Vacant Visit Agent) is built for that, so at your request I've left rostering out of the jobs below.

Dianne's goal for the Audit, in her words: "Get the paperwork off the care partners so they can spend the time with clients."

2. AI already in use

Dianne agreed I could talk to each staff member on their own. As agreed, this section names tools and jobs. It doesn't say who uses what.

Tool	Paid for by the business?	Used for	Client details going in?
ChatGPT, free version, on a personal phone	No	Tidying up incident write-ups and emails to families	Yes: names, what happened, health details
ShiftCare's note tools: voice-to-text, AI note rephrase, Completeness Coach	Yes, in your Premium plan	Care workers' visit notes (a few workers use them)	Yes, inside ShiftCare
ShiftCare's AI Smart Visit Summaries (briefings for care workers before each visit)	Listed by ShiftCare (check it's in your plan)	Care workers read them before visits	Yes, inside ShiftCare
ShiftCare's SmartMatch, Vacant Visit Agent, and the link to outside AI tools (MCP)	Yes, in your plan	Not turned on	No
Claude, or any other business AI plan	No plan	Nothing	No

Nobody was doing anything they thought was wrong. The free tool was just the easiest thing to hand. But the free version isn't set up for health information, and the business doesn't know what's been put into it.

ShiftCare says its built-in AI runs inside its own Amazon cloud set-up and doesn't send your data to an outside AI company. Its AI pages now say that's hosted in Sydney. It's worth checking your contract says

the same. The AI built into ShiftCare counts as AI you use. The National AI Centre suggests listing it alongside anything you add yourself (section 3).

3. What the guidance says, and what I saw

This section sets out what the law and the regulators say, next to what I saw on the day. **It isn't legal advice.** For what it means for your business, talk to your own adviser.

Guidance	What it asks for, in short	What I saw
Aged Care Act 2024 (in force since 1 November 2025), Statement of Rights (s 23) and protecting personal information (s 168)	Each person's privacy respected and their information protected. Use their information only for their care or the reason it was given. Pass it on only with their consent, for their care, or to meet the Act. Reasonable safeguards against loss or misuse.	Health details going into a free AI tool.
Aged Care Rules 2025, Quality Standards Outcome 2.7	Information about a person is accurate and current, can be understood by them and their supporters, and is kept confidential in line with their informed consent.	Client consent forms don't mention AI.
Aged Care Rules 2025, incident management (164-25) and SIRS (165A-25, 165A-30)	Every incident recorded with set details (13 of them, including witnesses, whether it's reportable and who was consulted), kept 7 years. Priority 1 notice to the Commissioner within 24 hours, the rest within 5 days. Priority 2 within 30 days. Both through the My Aged Care provider portal.	Your ShiftCare incident form doesn't ask for witnesses' contact details, whether it's reportable, or who was consulted.
Privacy Act 1988, s 6FB and s 6D(4), and APP 1	Care in aged care counts as a health service, so a provider that holds health information is covered whatever its turnover, including the data breach scheme. Your privacy policy says whether personal information is likely to go overseas, and where.	Privacy policy doesn't mention AI, or information stored overseas.
OAIC (privacy regulator), guidance on commercially available AI products, 21 October 2024, updated 17 January 2025	Recommends no personal information, and sensitive information most of all, in public AI tools. Tell people in your privacy policy how you use AI. Get consent before an AI tool records or transcribes a conversation with health information in it.	As above. No one records meetings with AI yet.
OAIC, automated decisions in privacy policies, from 10 December 2026	If a computer program makes, or substantially and directly helps make, a decision that could significantly affect someone, your privacy policy must say so. The OAIC lists aged care among the areas usually in scope.	Nothing in this report feeds a decision about a person. If you turn on SmartMatch or the Vacant Visit Agent to choose who visits whom, ask your adviser whether it's caught.

Guidance	What it asks for, in short	What I saw
Aged Care Quality and Safety Commission (runs the Serious Incident Response Scheme, SIRS)	No AI guidance for providers on its site, searched on 31 October 2026. Its AI Transparency Statement (16 July 2026) covers its own use of AI.	Nothing to act on yet. Worth checking again at your 12-month review.
National AI Centre, Guidance for AI adoption: foundations, first published October 2025 (current version 5 May 2026)	Someone accountable for AI. An AI policy. A register of the AI you use, including AI built into other software. Human review matched to the stakes.	No one named. No register.

The good news: none of this is hard to put right. Section 7 lists what to do.

4. The jobs and hours now

Hours are a typical week, outside the end of the month. Dianne checked and signed off these figures on the day.

Job	Hours a week	Who does it	How I timed it
1. Getting a new client started (about 2 a week)	9	Leah, care partners, rostering	Watched, and your records
2. Incident records and notices (about 6 logged a week)	5	Care partners, Dianne	Your records (ShiftCare)
3. Care plan reviews (about 3 a week)	7	Care partners	Your estimate
4. Keeping families in the loop	6	Care partners, Leah	Your records (Outlook, portal)
5. Monthly statements and claims	8	Sandra	Your estimate
Total	**35**		

"Your records" means counts and times your staff pulled for me. I didn't look at clients' details.

Signed: Dianne Ashdown, 27 October 2026

5. The map

Each step of each job goes one of three ways:

- **Hand to AI:** AI drafts it. A person reads it before it goes anywhere.
- **Hand over with a check:** AI does the work, and a named person checks it against the source every time. The checking time is shown, and it's already taken off the hours back in sections 8 and 10.
- **Keep human:** a person does it. AI doesn't touch it.

Job and step	Where it goes	Why
1. New client: first call, and recording what's been approved	Hand over with a check, about 15 minutes a week	Leah checks the details against the person's Notice of Decision.
1. New client: the home visit, the person's needs and goals, and going through the agreement with them	**Keep human**	See section 6.

Job and step	Where it goes	Why
1. New client: the service agreement in plain language, from your template and price list	Hand over with a check, about 20 minutes a week	It must be plain language and readily understood (Rules 148-65). The care partner checks prices and services against ShiftCare.
1. New client: writing up the care plan from the care partner's visit notes	Hand over with a check, about 40 minutes a week	What goes in is worked out with the person. The care partner checks every line against their own notes (Outcome 2.7).
1. New client: welcome letter and the start-day checklist	Hand to AI	Drafting from a template. Leah reads it before it goes.
2. Incidents: turning the worker's account into a draft record with the set details	Hand over with a check, about 30 minutes a week	The care partner checks every detail against the worker's account (Rules 164-25).
2. Incidents: deciding if it's reportable and priority 1 or 2, and lodging the notice	**Keep human**	See section 6.
2. Incidents: drafting the notice wording once Dianne has decided	Hand over with a check, about 15 minutes a week	Dianne reads it against the record before she lodges it (SIRS).
3. Reviews: list of reviews due and plans that need changing	Hand to AI	Read from ShiftCare's review dates, once they're moved there (job 3). Megan checks the list each week.
3. Reviews: a review pack from the notes since the last plan	Hand over with a check, about 30 minutes a week	A summary can miss something. The care partner reads the flagged notes in full (Outcome 3.3).
3. Reviews: the updated plan and covering letter after the meeting	Hand over with a check, about 45 minutes a week	The person gets a copy every time it changes. The care partner checks every line (Rules 148-80).
4. Families: replies and updates from ShiftCare notes	Hand over with a check, about 45 minutes a week	Only what the person has agreed to share (Act ss 29 and 168). Whoever sends it reads it first.
5. Statements and claims: the figures	**Keep human**	See section 6.

6. What stays human, and why

- **Deciding whether an incident is reportable, how serious it is, and lodging the notice.** The Rules put that on the provider, and the Commission says workers ask the manager if they're unsure. Dianne decides and lodges.
- **What goes in a person's care plan.** The Department says care partners prepare care plans, and the person's choices are theirs (Act s 23). AI can set out what the care partner wrote. It doesn't decide anything.
- **The home visit, and going through the agreement.** The person has to be involved and helped to understand the terms, with a supporter there if they want (Rules 148-65).
- **The monthly care management contact.** Support at Home needs at least one direct care management activity every month with each client or their registered supporter. That's your care partners' work.
- **Clinical care and medicines.** Under the Quality Standards, medicines are administered, monitored and reviewed by registered health practitioners (Outcome 5.3), and clinical oversight is Dianne's. Care workers' medication prompts follow your medication policy.
- **Noticing that someone's getting worse.** Changes have to be escalated (Outcome 3.3). An AI summary can't be the only way a change gets picked up.
- **The figures on budgets, statements and claims.** Each statement lists every service with its price, the subsidy and the client's contribution, and you must not claim for a service you haven't delivered. The figures come from ShiftCare, and Sandra checks them against what was delivered.

These stay human for good. The notes summary could change if ShiftCare's or another tool's summaries prove reliable over a year of your own checks. I'd look at that again at your 12-month review.

7. Fix now

These are risks, so they don't wait for a choice between options. Each one comes from the guidance in section 3. None of them needs anything from me.

What to do	Why	Guidance
Stop client details going into the free AI tool on the personal phone	The free version isn't set up for health information	Act s 168, OAIC
Put a written AI use policy in place. Write your own from the guidance in section 3, or use any provider's	You don't have one, and it's the base for everything else	National AI Centre, OAIC
Add AI, and information stored overseas, to your privacy policy and client consent forms, and ask clients again for their consent	Neither mentions it, and confidentiality has to be in line with each person's informed consent	Privacy Act (APP 1), OAIC, Outcome 2.7
Add the missing set details to your ShiftCare incident form: witnesses' contact details, whether it's reportable, and who was consulted	Every incident record needs them, kept 7 years	Rules 164-25
Name who's accountable for AI, and keep a list of the AI you use, including ShiftCare's	No one's named and there's no list	National AI Centre

8. Your options

For each of jobs 1 to 4 I've set out the options I found that don't involve me: what each does, what it costs, and how many hours a week it gives back after checking. Job 5 stays in ShiftCare with Sandra (section 6), so it has none. What I'd do is in section 10, kept apart so you can weigh these on their own.

How I worked out the figures. I didn't ask what anyone's paid. I cost the time at the award minimum for the role, under the Social, Community, Home Care and Disability Services Industry Award (SCHADS), at the equal remuneration rates in the Fair Work Ombudsman's current pay guide (from 1 September 2026): Leah and Sandra at social and community services level 2 ($36.22 an hour), the care partners at level 4 ($46.70). Your care workers are on home care level 2 ($34.42), the lowest award rate in your business, so that's the rate for Dianne's time. Where a job is shared, I've used the lower rate of the people doing it. So these are the least the time is worth.

Check any figure yourself, or any quote you get. Months to pay back = cost to start ÷ (hours back a week × the hourly rate × 4.33 weeks, less any cost a month). Set-up time is costed the same way.

Hours back are my estimates from what I saw, after checking time is taken off. "Hours still spent" is what the job still takes each week with that option in place. Your real figures go in your records.

These are the options I found. There may be others. I looked at what ShiftCare and Microsoft 365 already do, the makers' own price pages, and products built for aged care. Prices are from each maker's page on 31 October 2026. You can do a fix without AI and use ShiftCare's features together. I haven't added them up, since they take time from the same steps.

Job 1. Getting a new client started (9 hours a week)

How it runs now. The person has been assessed, has their Notice of Decision and Support at Home classification, and once their funding's allocated they choose you, often as a referral through the My Aged Care provider portal, sometimes after a call from them or their family. Leah accepts the referral or takes the call, records what's been approved, and books a care partner for a home visit. At the visit the care partner works through the person's needs, goals and risks with them, and goes through the service agreement and your price list in plain words, with their supporter there if they want. That includes contributions: Services Australia assesses income and assets, and since 1 October 2026 there's nothing to pay for personal care. The agreement carries a 14-day cooling-off period. It and the care plan both have to be in place before or on the first day of services, and the individualised budget goes with the plan as soon as possible. Back at the office the care partner writes up the plan, Leah sets the person up in ShiftCare with their budget, Kylie or Ben rosters workers to their preferred days and times, and copies of the agreement, plan and budget go to the person or their supporter. That's about 4.5 office hours for each of the 2 or so new clients a week. The visit stays human whatever you choose (section 6). Costed at Leah's rate ($36.22), the lower of the people doing it.

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
What it does	One start-day checklist from first call to first visit, kept with each client's file, and one plain-language agreement template with your price list built in	Voice-to-text: the care partner speaks the visit notes into the ShiftCare app after the visit, and ShiftCare's AI transcribes and sets them out	Copilot in Word and Outlook drafts the welcome letter, the agreement from your template and the care plan wording, from what the care partner gives it
What's left for your staff	Writing the plan, the letter and the agreement for each person, and every copy	Turning the notes into the plan, and writing the letter and the agreement	Giving it the notes, checking every draft, and putting the final versions into ShiftCare
Setting it up (my estimate)	About 6 hours: the checklist, the template and a test run	About 2 hours: turning it on and trying it on two visits	About 4 hours: templates and a short session for 4 users

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
Where client details are kept	ShiftCare, as now	ShiftCare, as now	Microsoft 365, under your licence, as well as ShiftCare
Who checks	The care partner, as now	The care partner reads the transcribed notes before using them	The care partner checks the plan and agreement. Leah checks the letter
Limits	Doesn't write anything for you	It sets out the notes, but doesn't write the plan or agreement	It doesn't see ShiftCare unless you connect it, which ShiftCare's help pages say takes some technical set-up
Cost to start	$217 (6 hours of Leah's time)	$72 (2 hours)	$145 (4 hours)
Cost a month	Nothing	Nothing (in your Premium plan)	$138 (4 users at $31.40 plus GST, paid yearly)
Hours back a week (my estimate)	0.75 to 1.25	0.5 to 1	1 to 1.5
Hours still spent a week	7.75 to 8.25	8 to 8.5	7.5 to 8
Saves a month, after costs	$118 to $196	$78 to $157	$19 to $97
Pays back in	1 to 2 months	Under a month	1.5 to 8 months

What I'd take from this: the fix without AI saves the most for its cost. Copilot only earns its keep if you'd use it on jobs 3 and 4 as well.

Job 2. Incident records and notices (5 hours a week)

How it runs now. A care worker who sees an incident, such as a fall, a client found unwell, a missed medication prompt or a worry about how someone's being treated, tells the office straight away and logs it in the ShiftCare app. The care partner follows up the same day: what happened, the harm, who was there, witnesses, what was done for the person, and who's been told. The record has to hold the set details the Rules list, kept 7 years. Dianne decides whether it's reportable under the Serious Incident Response Scheme (SIRS) and whether it's priority 1 or 2. A priority 1 notice goes to the Commissioner through the My Aged Care provider portal within 24 hours, with the rest of the details within 5 days. A priority 2 notice goes within 30 days. The person and their supporter are kept informed, and once a month Dianne looks across the incidents for patterns. About 6 incidents are logged a week, with a priority 1 notice about once a month. Most of the 5 hours is care partners writing records up. Costed at the lowest rate ($34.42), since Dianne's time is part of it.

	Fix without AI	What you already have: ShiftCare
What it does	The ShiftCare incident form rebuilt with the 13 set details as required fields, and a one-page SIRS guide (reportable or not, priority 1 or 2) beside it	Voice-to-text, AI note rephrase and the Completeness Coach help workers write a fuller account. ShiftCare also lists risk flags on notes that may describe an incident (check it's switched on in your account)
What's left for your staff	Following up and writing the record, deciding, drafting and lodging the notice	Writing the record from the worker's account, deciding, drafting and lodging

	Fix without AI	What you already have: ShiftCare
Setting it up (my estimate)	About 5 hours: the form and the guide	About 2 hours: turning the features on and showing workers
Where client details are kept	ShiftCare, as now	ShiftCare, as now
Who checks	The care partner and Dianne, as now	The care partner reads each flag and each note
Limits	Doesn't write anything for you	These work on visit notes. ShiftCare's pages don't say they work inside the incident form
Cost to start	$172 (5 hours)	$69 (2 hours)
Cost a month	Nothing	Nothing (in your Premium plan)
Hours back a week (my estimate)	0.75 to 1	0.25 to 0.5
Hours still spent a week	4 to 4.25	4.5 to 4.75
Saves a month, after costs	$112 to $149	$37 to $75
Pays back in	1 to 2 months	Under a month to 2 months

I found one incident product whose own page says it covers SIRS, Riskonnect. It's priced by quote and is a large risk and compliance system, likely more than an office your size needs, so I haven't put it in the table.

What I'd take from this: fix the form first. It's in Fix now anyway (section 7), and it saves the most.

Job 3. Care plan reviews (7 hours a week)

How it runs now. Each care plan is reviewed at least every 12 months, and sooner when the person's needs change, they move to a higher classification, they're approved for assistive technology or home modifications, or they start end-of-life care. The budget is reviewed with it, and the person gets a new copy every time the plan changes. Here, the care partners keep review dates in a spreadsheet. Before each review the care partner reads back through the visit notes since the last plan, then meets the person (and their supporter) at home, updates goals, services, preferences and risks, updates the budget in ShiftCare, asks Kylie or Ben to change the roster, and sends the new plan out. About 3 reviews a week, at about 2 office hours each plus the date-keeping. Costed at the care partners' rate ($46.70).

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
What it does	Review dates moved from the spreadsheet into ShiftCare, with a weekly list, and one review template that follows your plan headings	AI Smart Visit Summaries: concise briefings from recent shift notes, made for care workers before each visit. The care partner can read the latest one before a review. How well they suit reviews isn't checked	Copilot in Word drafts the updated plan wording and the covering letter from the care partner's notes
What's left for your staff	Reading the notes, writing the updated plan, sending it	Reading the notes since the last plan, writing the updated plan, the letter and the budget changes	Giving it the notes, checking every line, and putting the plan into ShiftCare

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
Setting it up (my estimate)	About 4 hours	About 1 hour: checking they're switched on and trying them on a few reviews	About 2 hours, on the same licences as job 1
Where client details are kept	ShiftCare, as now	ShiftCare, as now	Microsoft 365 and ShiftCare
Who checks	The care partner, as now	The care partner, as now	The care partner checks every line before it goes
Limits	Doesn't write anything for you	Built for the next visit, not the months since the last plan	Doesn't see ShiftCare's notes unless they're given to it
Cost to start	$187 (4 hours)	$47 (1 hour)	$93 (2 hours)
Cost a month	Nothing	Nothing (in your Premium plan)	Nothing more, if you have it for job 1 ($138 on its own)
Hours back a week (my estimate)	0.75 to 1	0.25 to 0.5	0.75 to 1.25
Hours still spent a week	6 to 6.25	6.5 to 6.75	5.75 to 6.25
Saves a month, after costs	$152 to $202	$51 to $101	$152 to $253
Pays back in	About a month	Under a month	Under a month

What I'd take from this: move the dates out of the spreadsheet and use one review template. That saves the most without a monthly cost.

Job 4. Keeping families in the loop (6 hours a week)

How it runs now. Families and registered supporters ring and email the office: who's coming on Tuesday, why the worker changed, how Mum's been, a question about the monthly statement. Some use ShiftCare's Family Portal. Most still ring or email. The care partners answer most of it and Leah the rest, from what's in ShiftCare. Under the Act, information goes to a registered supporter where the person has agreed, and to anyone else only with the person's consent, so staff check what each person has agreed to share before they answer. The monthly care management contact isn't counted here, as it's care time. Costed at Leah's rate ($36.22), the lower of the people doing it.

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
What it does	Templates for the common replies (roster change, new worker, after a review) and set times each day to answer	The Family Portal: families see upcoming visits, completed visit records, worker profiles, shared documents and messages from you. ShiftCare also lists AI reminder message generation	Copilot in Outlook drafts replies from what staff give it
What's left for your staff	Every reply	Messages the portal doesn't answer, and inviting families onto it	Giving it the facts, checking and sending every reply

	Fix without AI	What you already have: ShiftCare	Microsoft 365 Copilot Business
Setting it up (my estimate)	About 3 hours	About 4 hours: checking consent and inviting supporters	About 1 hour, on the same licences as job 1
Where client details are kept	Outlook and ShiftCare, as now	ShiftCare, as now	Microsoft 365 and ShiftCare
Who checks	Whoever sends it	You choose what families see in the portal	Whoever sends it reads it first
Limits	Still one reply at a time	Only helps families who use it	Doesn't see ShiftCare unless it's given the facts
Cost to start	$109 (3 hours)	$145 (4 hours)	$36 (1 hour)
Cost a month	Nothing	Nothing (in your Premium plan)	Nothing more, if you have it for job 1 ($138 on its own)
Hours back a week (my estimate)	0.5 to 0.75	1 to 1.5	0.5 to 1
Hours still spent a week	5.25 to 5.5	4.5 to 5	5 to 5.5
Saves a month, after costs	$78 to $118	$157 to $235	$78 to $157
Pays back in	About a month	Under a month	Under a month

What I'd take from this: the more families use the portal, the fewer calls you get. Start with the supporters who've agreed.

All four jobs, without me

If you took the option that saves you the most each month for each job, this is the total. None of them costs anything a month.

	1. New client	2. Incidents	3. Reviews	4. Families	Total
Option	Fix without AI	Fix without AI	Fix without AI	Family Portal	
Cost to start	$217	$172	$187	$145	**$721**
Cost a month	Nothing	Nothing	Nothing	Nothing	**Nothing**
Hours back a week (my estimate)	0.75 to 1.25	0.75 to 1	0.75 to 1	1 to 1.5	**3.25 to 4.75**
Hours still spent a week	7.75 to 8.25	4 to 4.25	6 to 6.25	4.5 to 5	**22.25 to 23.75**
Saves a month, after costs	$118 to $196	$112 to $149	$152 to $202	$157 to $235	**$538 to $783**

The four jobs take 27 hours a week now. Without me, 22.25 to 23.75 of those hours are still spent each week.

9. Policy and staff

You need a written AI use policy (section 7). It should cover five things:

- what staff can and can't put into AI tools, with health information named
- which tools the business has approved, including ShiftCare's AI
- who checks AI work before it goes to a client, a family or the Commission, and how that's recorded
- what clients are told, and how their consent is noted
- who's accountable (usually the director)

Staff. Everyone I spoke to was keen, and nobody had been shown how to use AI safely. A short session once the policy's in place would cover what's allowed, how to check AI work, and where client details can and can't go. Your care workers would need a shorter version, since they use ShiftCare's note tools.

PROMPT WORKS STUDIO

Your mail and accounts

Your email, your domain name and who can get into them sit under everything else in this report, so they get a page of their own. Your domain's public records were read from outside. On the day, your IT provider logged in and we went through the admin screens together with you. I didn't log in or take a password, nothing was changed, and no client mail or client files were opened.

What I looked at	What I found	Where it stands
Your domain name	It's in the business's name, and your IT provider holds the login. It renews in August 2027	Yours and theirs
Where your mail goes	To Microsoft 365, on your own domain	OK
Proof your mail is really from you	SPF and DKIM are right. DMARC is set to its first step and hasn't been moved on, so it reports on fake mail and doesn't stop it	Gap 1
Other things that send as you	We didn't find anything else sending with your address on the day	OK
Who looks after it	An outside IT provider, on a monthly contract, holds the admin login and sends your bill	Yours and theirs
Plan and licences	Business Standard for the office team of eight, all in use. Care workers have no mailbox	OK
Getting back in	Two admin accounts, both held by the provider. If the contract ended, you'd need them to hand it over	Gap 2
Two-step sign-in	Microsoft's security defaults are on	OK
Mail protection	The built-in protection is on, and so are Microsoft's Standard settings	OK
Mail forwarded out	Set to Automatic. Microsoft says to set it to On or Off	Gap 3
One login a person	One account a person, and intake@ is a shared mailbox. Nobody said they share a login	OK
People who've left	Two unlicensed accounts can still sign in. There are no written steps for when someone leaves	Gap 4
Where the screen says your data sits	Australia. That's as far as this page goes	Noted
Backup	Your IT provider says they keep a copy of your mail. I didn't see it	Ask them

What this means for your security. Microsoft's own list for a small business starts with two-step sign-in and looking after admin accounts. Your security defaults cover the first. The second is gap 2: nobody in the business holds an admin account. Your mail is about older people's care, so gap 4 is worth asking about too.

What I didn't look at. Your computers, phones, network, antivirus, firewall, files and folders. This isn't a security audit, and a clean row doesn't mean nothing can go wrong.

What I can't do. I don't work on a domain or account someone else holds, or on the things I didn't look at. If you think someone's already got into your accounts, you need an IT security firm. I'm not one.

What to do with this. Your IT provider holds the login, so I can't quote on any of these. Section 10 lists what to ask them. This page is yours, so you can take it to anyone you like.

10. What I can do for you

This is what doing it with me would look like. I'd build job 3 now, in your own Claude account. All four jobs are set out below so you can see each one, but only job 3 passes my 12-month rule. Each run is started by one of your people. Claude reads client details, funding, care plan review dates and rosters from ShiftCare through ShiftCare's own Claude connection. ShiftCare's pages don't show it sharing visit notes or incident records yet (ShiftCare calls it an initial rollout), so staff copy those in. All prices include GST.

My solution, job by job

	1. New client	2. Incidents	3. Reviews	4. Families
What Claude does	When the care partner starts it after a visit, reads the client's details in ShiftCare and the visit notes they copy in, and drafts the welcome letter, the agreement from your template (your price list goes in as it is) and the care plan. It keeps the start-day checklist for that client	When the care partner starts it, turns the worker's account, copied in from ShiftCare, into a draft record with the set details and lists what's missing. Once Dianne has decided, it drafts the notice wording	When the care partner starts it each week, lists reviews due from ShiftCare (once the dates are moved there), builds a review pack from the notes copied in, and drafts the updated plan and letter after the meeting	When a staff member starts it, drafts the reply or update from the roster in ShiftCare and the notes they copy in, holding back anything the person hasn't agreed to share
Who checks	Leah checks details against the Notice of Decision. The care partner checks the agreement and plan, then goes through both with the person	The care partner checks every detail against the worker's account. Dianne decides and lodges	The care partner reads the flagged notes in full and checks every line of the plan	Whoever sends it reads it first
Tier, and why	Tier 2: drafting, plus one for the rules on agreements and care plans. Your published price list goes in unchanged and staff add the contribution rate from Services Australia's letter, so Claude produces no figure	Tier 2: drafting, plus one because it sits beside your SIRS duty	Tier 2: summarising and drafting, plus one because care plan reviews have rules to meet	Tier 2: drafting, plus one because it must hold back what the person hasn't agreed to share (Act ss 29 and 168)
Build	$4,200	$4,200	$4,200	$4,200

	1. New client	2. Incidents	3. Reviews	4. Families
Extra Claude accounts	$300 (4 people use it: 2 past the first two)	$300 (4 people)	$150 (3 people)	$300 (4 people)
Hours back a week (my estimate)	2 to 3	1.5 to 2	2.5 to 3.5	1.5 to 2.5
Hours still spent a week	6 to 7	3 to 3.5	3.5 to 4.5	3.5 to 4.5

A Tier is a job's price band: Tier 1 for drafting or summarising, Tier 2 for review, plus one for a figure you rely on and one for work beside a compliance duty, up to Tier 3. Personal information gets its own safeguards on every Tier. I build each job with you, train your staff on it, come back for a short follow-up session two to three weeks after go-live, answer your questions free for 30 days, and check in at 3, 6 and 12 months. All of that is in the Build price.

What a Build needs

A Build runs in a Claude plan in your business's name, under Anthropic's business terms. For your office that's the Team plan, US$25 a seat a month billed monthly, with tax added at billing. I couldn't find an Australian price on Anthropic's pages. Five seats (Dianne, the three care partners and Leah) come to about $178 a month before tax at the 30 October exchange rate, about $195 with GST on top, and that's the figure in the tables below. Your plan is paid to Anthropic, on top of my prices. The first two seats cost nothing extra from me. Each person past two who uses a job adds $150 to that job, once.

Why a business plan rather than a free or Pro one: on the Free, Pro and Max plans, Anthropic may use what you type to train its models unless each person turns that off in their own settings. On Team it doesn't, by default.

Because every one of these jobs handles clients' personal information, each run is started by a named person in your office. It can run in a Claude chat, in Cowork or in Claude Code, and I'll pick whichever suits the job. In Cowork I set it to stop and ask before each action. Nothing runs on its own or on a timer with clients' details in it. Any automatic step would only work on information with names taken out, or with none at all.

ShiftCare's connection to Claude is turned on by a ShiftCare admin, and for office staff it's read-only: Claude can read what that person can already see in ShiftCare (today that's clients, funding, review dates, shifts and invoices), and can't change anything. Your staff still put the final version into ShiftCare themselves.

You don't have a Claude plan now (section 2). Setting one up properly, with the privacy settings, the ShiftCare connection, your business's context and your AI use policy inside it, is my **Set-up and Onboarding** service: $1,500, my price for 1 to 5 people, because only five of your people use Claude. It's a service in its own right, so it isn't counted in each job's 12-month test, but it's in the totals below.

Where your clients' information goes

A common worry is health information going off to a server overseas, so here's the straight answer. Claude runs on Anthropic's servers in the United States and other countries, and anything the Build reads from ShiftCare is processed there. ShiftCare's own pages say that once data leaves ShiftCare for an AI tool you've connected, looking after it is your responsibility. On a Team plan, Anthropic doesn't use it to train its models by default, and your business controls the account. Your clients' information doesn't come to me: I work inside your account with your named person present, and my data handling addendum, which comes with the Build agreement, sets out what can reach me (at most, file names in

the reports your person sends, if you choose that, and those can carry clients' names) and what never does. The Privacy Act covers you (section 3), so your privacy policy should say that personal information is likely to go overseas, and under the Quality Standards each person's information is kept confidential in line with their informed consent. Before a Build starts, I sit with you and read Anthropic's terms for your plan, so the decision to put clients' details in is yours, made with the terms in front of you, once you have your clients' consent, as in section 7.

Your mail and accounts. Your IT provider holds the login to everything on the mail and accounts page, so I can't quote on any of the four gaps. They're the list to take to your provider: move DMARC on, add an admin account the business holds, set forwarding to Off, close the two old accounts and write down the steps for when someone leaves. Whether your contract covers these is between you and your provider.

Each job, counted on its own

I only take on a Build that pays for itself within 12 months, counted job by job and judged on the better end of my estimates. A job carries its Build price and its extra accounts, plus its share of the $195 a month Claude plan with the other jobs taken on. The **Build fee** ($1,500, once per Build, for planning it and agreeing how we'll test it) comes to nothing here, because your Audit fee ($2,250, quoted for a provider your size) comes off it if you go ahead within 90 days, and that covers the whole $1,500 (the **Audit credit**). The rest of the Audit fee isn't credited anywhere else.

Job 3 saves the most, so I've tested it on its own first, then each other job alongside it, sharing the plan half each:

Job	Cost	Saves a month	Pays back in	Within 12 months?
3. Reviews, on its own	$4,350	$310 to $512	8.5 to 14 months	Yes
1. New client, with 3	$4,500	$216 to $373	12.1 to 20.8 months	Just misses
4. Families, with 3	$4,500	$138 to $294	15.3 to 32.7 months	No
2. Incidents, with 3	$4,500	$126 to $200	22.5 to 35.7 months	No

"Saves a month" is after each job's share of the plan, judged on the better end of my estimates. Sharing the plan more widely doesn't change the answer: with all four together, job 1 would come to 10.7 months, but only because jobs 2 and 4, which don't pass, carry half the plan. So job 3 is the one I'd take on now. I'd look at job 1 again at your 3-month check-in, once your own records show what job 3 gives back.

These are the least the time is worth, at the award minimum. If your people are paid more than that, every job pays back sooner than shown.

PROMPT WORKS STUDIO

The two totals side by side

	All four jobs, without me (section 8)	Job 3 with me, the other three without me	All four jobs with me
Cost to start	$721	$6,384: job 3's Build with its extra account ($4,350), Set-up ($1,500) and $534 of staff time for the other three	$19,350: four Builds with their extra accounts ($17,850) and Set-up ($1,500)
Cost a month	Nothing	$195 (Claude Team plan, five seats)	$195
Hours back a week (my estimate)	3.25 to 4.75	5 to 7.25	7.5 to 11
Hours still spent a week (of 27 now)	22.25 to 23.75	19.75 to 22	16 to 19.5
Saves a month, after costs	$538 to $783	$696 to $1,093	$1,083 to $1,673
Pays back in	About a month	5.8 to 9.2 months	11.6 to 17.9 months
Catches up with "without me" after		18.3 to 35.7 months	20.9 to 34.2 months
Ahead after three years, after all costs	$18,643 to $27,450	$18,688 to $32,955	$19,627 to $40,881

Your Audit fee covers the Build fee in both "with me" columns. I wouldn't take on jobs 1, 2 and 4 yet. All three columns are at the award minimum.

Prices

A Build, per job	$3,400 (Tier 1), $4,200 (Tier 2) or $5,500 (Tier 3), with the follow-up session, 30 days of questions and check-ins at 3, 6 and 12 months included
Build fee	$1,500, once per Build, however many jobs are in it
Extra Claude accounts	None for the two seats a Team plan needs. $150 a job for each person past two
The Audit fee	$2,250, quoted for a provider your size. It comes off the Build fee, up to the full $1,500, if you go ahead within 90 days of this report
Set-up and Onboarding	$1,500, the 1 to 5 people price, since five of your people use Claude: your Claude plan set up properly, with your AI use policy
An AI use policy	$750. You don't have to use mine: any provider's will do, or write your own
Monthly tune-up (optional)	$750 a month, for up to 4 hours of checks and fixes to what's built

To start, reply to this report or call me, and we'll go through it together.

In 30 days I'll book a 20-minute call: what you've done, what's stuck. It's part of the Audit either way.

This report is yours. Keep it, share it, take it to any provider.

It was drafted with AI (Claude) from my notes on the day, then checked and finalised by Chad Maxwell.