Plans and Entitlements

Last Modified on 19/02/2024 1:44 pm ACDT

CareRight models simple Plans & Entitlements, for the purposes of tracking things such as a *Mental Health Care Plan* (MHCP) or NDIS Budget.

These are user definable and simply a way to keep track of what a Patient is entitled to, and what they have used.

Permissions

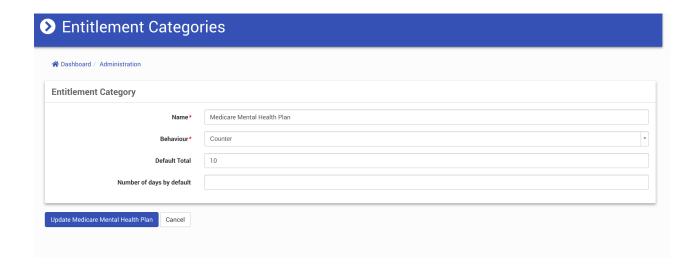
Three basic permissions exist

- Entitlement Manager Able to create and archive entitlement categories
- Entitlement Viewer Can read only see a Patient's plans and usage
- Entitlement Editor Can create, update, and record usage of plans

Entitlement Categories

Under Administration > Entitlement Categories, you can created, edit and archive.





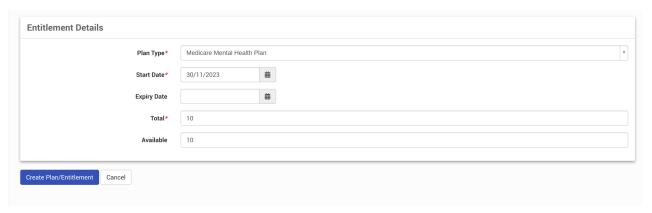
- Name Choose a name for your plan.
- Behaviour One of "Counter" or "Budgetary". A counter is a simple 1/10 style plan, where a budget is for dollar amounts, ie \$10,000 of funding.
- Default total If every plan has a typical total, for example a *Mental Health Care Plan* comes with a 10 session default entitlement.
- Number of days by default Sets an expiry date, if known. For example, using 10 sessions within a 12 month period.

Patient Entitlements

With appropriate permissions, simply view the Plan/Entitlements area of the Patient record.

Add a Plan/Entitlement for a Patient

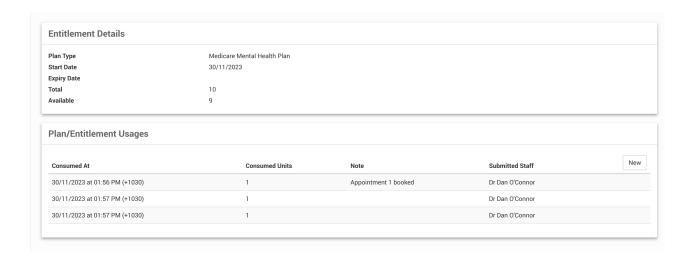
To start a new plan, select New.



The system presents defaults, but you may override these. For example, if a patient states they have used 5/10 sessions with another provider, you may wish to update the available amount.

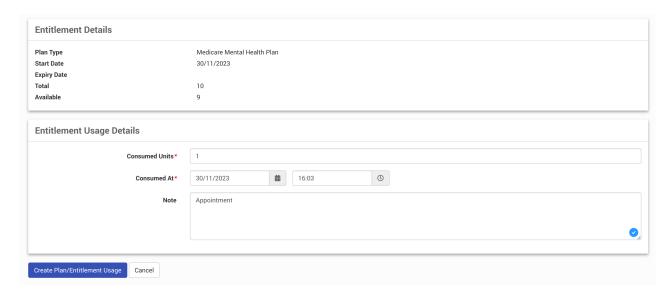
View usage of a Plan/Entitlement for a Patient

Select the *History* control, and you will be presented with the usage by the patient, as well as Staff who recorded consumption of a plan.



Usage of a Plan/Entitlement for a Patient

From either the overview screen, via Use or from viewing the History, via New, you can record usage.



Counter style plans will default to 1 unit.

Budgetary style plans will require you to enter the amount.

Automations and Trigger Scripts

Plans/Entitlements are available via the Automation system.

This allows you achieve things such as:

- The provider performs an assessment, and consumes a mental health care plan appointment type.
- A staff member does an intake assessment, and creates an NDIS budget as a result of their processes

