

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.

Entitlement Categories

New

Dashboard / Administration

Entitlement Category

Search...

Q

Name	Behaviour	Default Total	Number of days by default	Archived At	Enabled
Medicare Mental Health Plan	Counter	10			Enabled
NDIS Self Managed Budget	Budgetary Total		90		Enabled
Physio Gym Pass Program	Counter	10	30		Enabled
Discontinued Incentive Plan	Budgetary Total			30/11/2023 at 01:49 PM (+1030)	Disabled

Entitlement Categories

Dashboard / Administration

Entitlement Category

Name*

Medicare Mental Health Plan

Behaviour*

Counter

Default Total

10

Number of days by default

Update Medicare Mental Health Plan

Cancel

- 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*.

Entitlement Details

Plan Type*	Medicare Mental Health Plan	
Start Date*	30/11/2023	
Expiry Date		
Total*	10	
Available	10	

Create Plan/Entitlement
Cancel

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.

Entitlement Details

Plan Type

Medicare Mental Health Plan

Start Date

30/11/2023

Expiry Date

Total

10

Available

9

Plan/Entitlement Usages

Consumed At	Consumed Units	Note	Submitted Staff	New
30/11/2023 at 01:56 PM (+1030)	1	Appointment 1 booked	Dr Dan O'Connor	
30/11/2023 at 01:57 PM (+1030)	1		Dr Dan O'Connor	
30/11/2023 at 01:57 PM (+1030)	1		Dr Dan O'Connor	

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.

Entitlement Details

Plan Type

Medicare Mental Health Plan

Start Date

30/11/2023

Expiry Date

Total

10

Available

9

Entitlement Usage Details

Consumed Units *

Consumed At *

Note

1

30/11/2023

16:03

Appointment

Create Plan/Entitlement Usage

Cancel

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

- Dashboard
- Patients
- Miss Lady Smith
- Plan/Entitlements



Miss Lady Smith

My Health Record NOTICE Health and disability Mailhog Pricing

Facility: TTEST Location MRN: 000049 CRN: PN1811282 Primary Provider: Mr Stefan FORBES Referrer: Dr Brenda Reed ()
Fund: Better Health Cover (thelma), 6666666
Female , aged 43 years , born on October 27, 1980 , currently admitted to Adelaide . Mobile Phone: 0410412053
Do not contact Medicare Mental Health Plan NDIS Self Managed Budget

Dashboard / Patients / Miss Lady Smith / Plan/Entitlements

Plan/Entitlements

Category	Start Date	Expiry Date	Available	Consumed	Total	New			
NDIS Self Managed Budget	27/12/2023		\$10.00	\$0.00	\$10.00	Edit	Use	History	Archive
Medicare Mental Health Plan	05/12/2023		7	3	10	Edit	Use	History	Archive