

Plans and Entitlements Usage

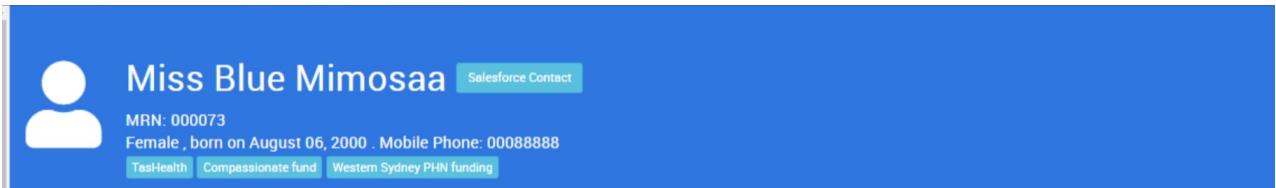
Last Modified on 18/10/2024 1:46 pm ACDT

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

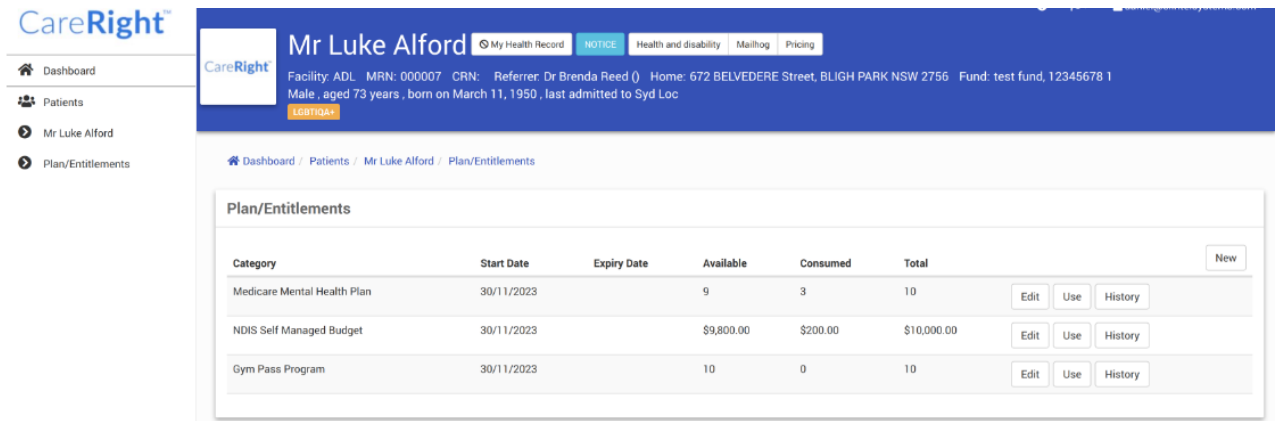
These are user definable and simply a way to keep track of what a Patient is entitled to, and what they have used.

Patient Entitlements

With appropriate permissions, users will see up to three current plans and entitlements shown in the patient banner. To see usage at a glance, hover over the entitlement.



Clicking on the entitlement drills down to see all Plan/Entitlements for 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 *

1

Consumed At *

30/11/2023

16:03

Note

Appointment

Create Plan/Entitlement Usage

Cancel

Counter style plans will default to 1 unit.

Budgetary style plans will require you to enter the amount.

Cases are typically the primary "container" for an episode of care, and multiple consultations may occur within the context of managing a patient over time. Often, a case may be closely associated with a plan or entitlement. See [Assign a Patient Entitlement to Cases](#).

When viewing or editing an appointment, CareRight presents the linked **Case**.

If a plan/entitlement is currently associated with that specific case, detail will be shown of the current usage and remaining entitlement:

Dr Clinician B GFA

View PatientEdit AppointmentNew Correspondence

[Dashboard / Appointments](#)

Appointment

Date

Start Time

Duration

Client

Provider

Location

Session Name

Session Type Category

Status

Condition

Appointment Type

Comments

Created By

18/10/2024

01:30 PM

60

Miss Blue Mimosaa

Clinician B GFA

CLAYTON

test

Consultation

Ready for Billing

Ready for Billing

C - Initial F2F

Better Access Initiative (Medicare) - 67

Better Access Initiative (Medicare)

sarah Clintel, 18/10/2024 12:49 PM (+1030)

This requires a **billing wizard** specific to your plans and entitlements to enable automated usage, as invoices and claims are created.

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



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

Contact Clintel to discuss your specific billing and claiming requirements.