

User guide – Managing budgets

Home Care Manager

Version 6.1

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1 Introduction

This guide is to assist the user in creating and modifying a client budget. Recommendations have been included which specifically relate to Home Care Packages, however budgets may be used for other situations where funds need to be monitored by the provider.

A budget must be created for all Home Care Package recipients to manage income, expenditure and creating statements.

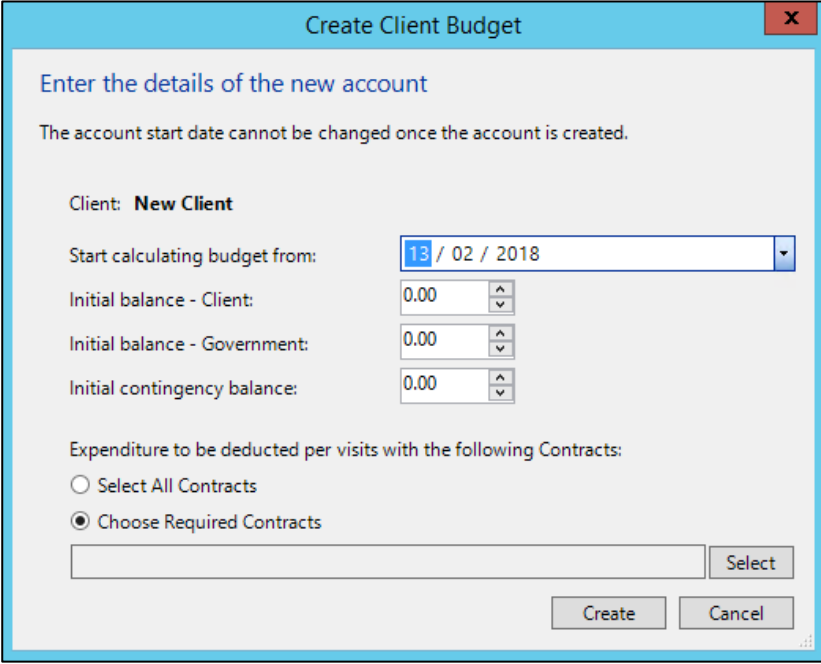
2 Creating a budget

Follow the below steps to create a budget:

1. Navigate to Clients and select the correct client.
2. Navigate to Client and then Budget.
3. Select 'Create budget'. The 'Create Client Budget' screen will appear.
4. Enter the start date of the budget under 'Start calculating budget from:'.
5. Under 'Initial balance – Client', enter the client balance amount if they have transferred from another provider.
6. Under 'Initial balance – Government', enter the client's government subsidy balance if they have transferred from another provider.


Note: The 'Initial balance – Client', and 'Initial balance – Government' may not be available at the time of setting up a new client budget. If this is the case, leave these fields as zero. These can be added at a later date using the 'Add Adjustment' function.

7. Expenditure to be deducted per visits with the following Contracts:
 - a. **Option 1 – Select All Contracts** – This option will enable the budget to utilise all contracts in Home Care Manager to deduct visit costs from the budget. This option should only be selected if the organisation manages Home Care Packages and no other contracts.
 - b. **Option 2 – Choose Required Contracts** – Click on 'Select', and choose the contracts that should be applied to the budget.
8. Select 'Create'.



Once the budget is created, the account details will be shown.

- Client – The client name.
- Budget ID – A unique number is created for the budget.
- Start calculating budget from – The date entered within the Create Client Budget screen.
- Current service level – All contracts currently held by the client are listed here.
- Balance (available) – Two balances are referred to:
 - **0.00 (Balance)** – Calculated based on all income as of today minus expenses as of today that have been invoiced. This is the actual budget balance.
 - **(0.00) (available)** – Calculated based on all income up to the last rostered date minus all expenses up to the last rostered date. This is the projected budget balance.
- Contingency balance – The current balance of contingency will be shown. If contingency is not being utilised, (Contingency not used) will show next to the balance.



3 Income and Expenses

Within the Income and Expenses tab, a list of all recurring income and expenses should be added. These income and expense occurrences will automatically update the transactions tab on the applicable days based on the recurrence.

Note: Visualise the budget screen as a bank account. The Income and Expense tab will show a list of all the direct debits planned to be deducted from the bank account and salary planned to be added to the bank account.

3.1 Adding a new recurring income

Within the client budget Income and Expenses tab, select 'Add Income' from the bottom right corner. The Add Recurring Income screen will appear.

1. Starting from – Enter the date that the recurring income must commence.
2. Ending on – Enter a date in this field if the recurring income has an end date.

Note: An end date is not critical if the amount is being populated from the package rates. Renewing the package rates will automatically set an end date to the recurring income and start a new recurring income.

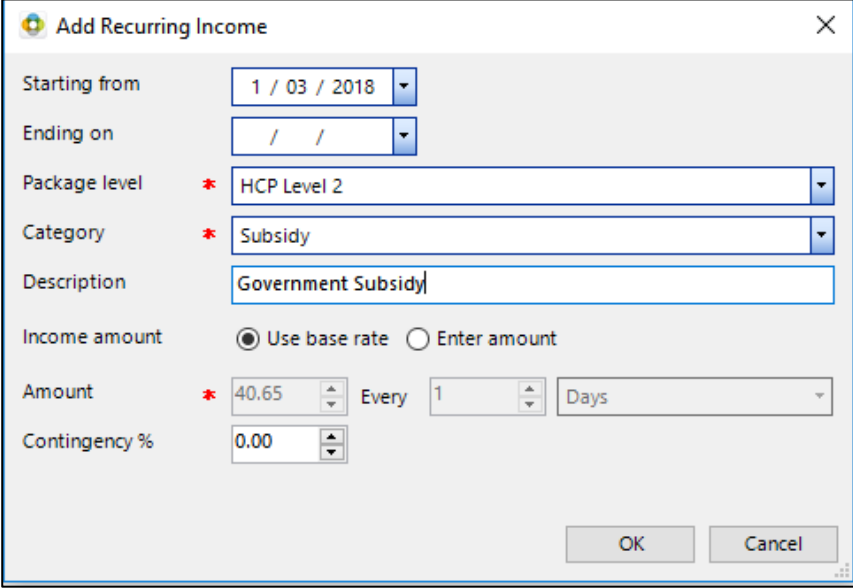
3. Package level – Select the appropriate Home Care Package level from the drop-down list.
4. Category – Select the appropriate category from the drop-down list.
5. Description – Enter a description for the recurring income.

Note: If the description field has been marked as mandatory, a description must be entered here.

6. Income Amount – If the 'Use base rate' option is selected, the pre-determined dollar amount and frequency will be displayed, if the 'Enter amount' option is selected, the dollar amount and frequency is required.
7. Contingency % - Enter the percentage to be calculated for contingency if required.

Note: If the Income Category selected relates to client income, the 'Invoice To' checkbox will appear. Select the box and choose the client or client contact to be billed to for the income.

8. Click 'OK'.



3.2 Adding a new recurring expense

Within the client budget Income and Expenses tab, select 'Add Expense' from the bottom right corner. The Add Recurring Expense screen will appear.

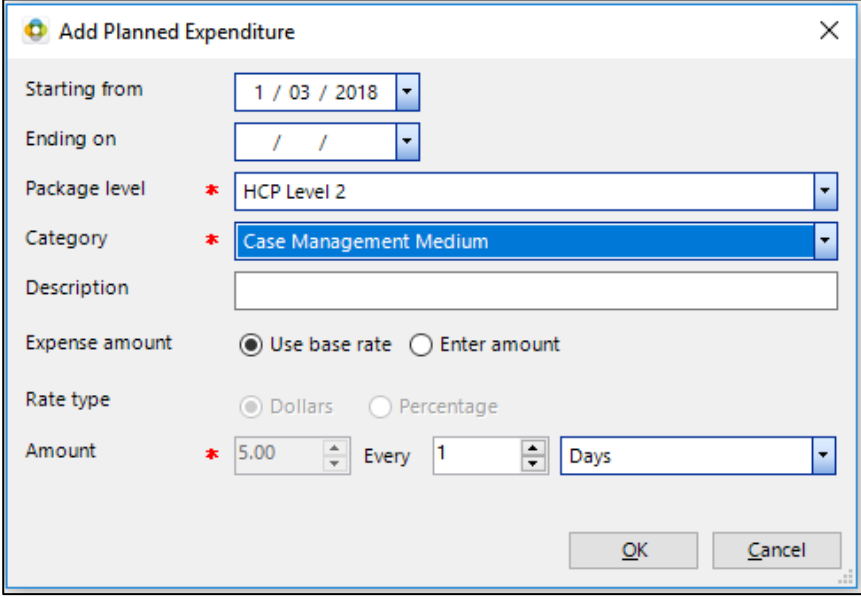
1. Starting from – Enter the date that the recurring expense must commence.
2. Ending on – Enter a date in this field if the recurring expense has an end date.
3. Package level – Select the appropriate Home Care Package level from the drop-down list.
4. Category – Select the appropriate category from the drop-down list.
5. Description – Enter a description for the recurring expense.

Note: If the description field has been marked as mandatory, a description must be entered here.

6. Expense Amount – If 'Use base rate' option is selected, the pre-determined dollar amount will be displayed, if 'Enter amount' option is selected, the dollar amount or percentage is required.

Note: The percentage-based expenses will calculate the percentage amount on the income which is marked with 'Include in expenditure calculation' within the budget settings.

7. Frequency (Every) – Enter the frequency of the expense to occur.
8. Click 'OK'.

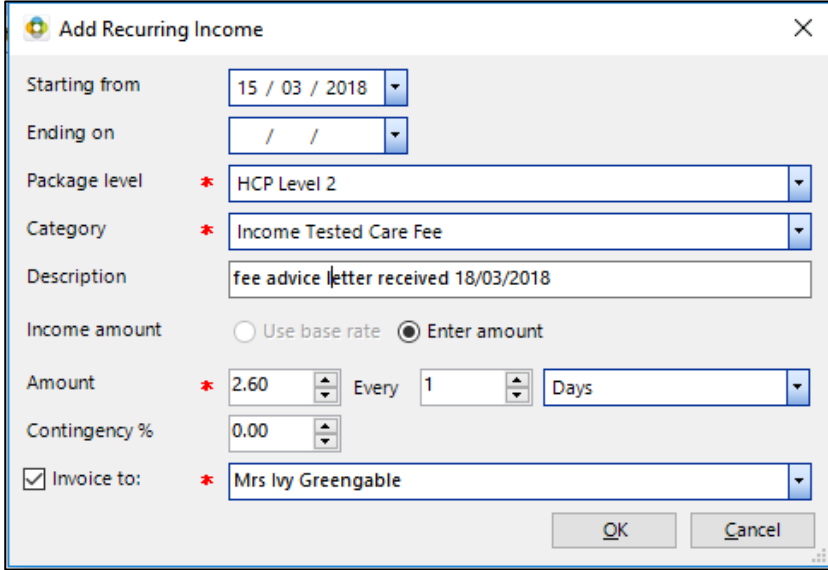


3.3 Adding an income tested care fee

If a client has been income assessed they may receive a fee-advice letter for income tested care fee to be payable in addition to their daily basic fee. The government reduces the amount of subsidy it pays based on the amount the client is asked to pay. The overall value of the package remains the same; what varies is the source of the funds.

From the Income and Expense tab, select 'Add Income' from the bottom right corner. The Add Recurring Income screen will appear.

1. Starting from – Enter the date the Income Tested Care Fee should commence.
2. Ending on – Leave this field blank.
3. Package level – Select the appropriate Home Care Package level from the drop-down list.
4. Category – Select Income Tested Care Fee from the drop-down list.
5. Description – Enter a description for the income tested fee if required.
6. Income amount – The Enter Amount option is automatically defaulted. Enter the amount per the fee advice letter issued for the client and ensure frequency is set to 'Daily'.
7. Contingency % – Add any contingency to be calculated on the Income Tested Care Fee.
8. Invoice to – Select the client or client contact to be invoiced from the drop-down list.
9. Click 'OK'.



Once the income tested care fee is created, Home Care Manager will automatically create a subsidy reduction as a negative recurring income. The amount will show as the negative value of the Income Tested Care Fee. The Government Subsidy income will remain as the full amount to ensure suspension income reduction calculations are correct.

Category	Description	Package Level	Amount
[-] Recurring expenses			
Case Management Medium		HCP Level 2	-5.00
[-] Recurring income			
Income Tested Care Fee	fee advice letter received...	HCP Level 2	2.60
Subsidy	Government Subsidy	HCP Level 2	40.65
Subsidy Reduction (ITCF)		HCP Level 2	-2.60

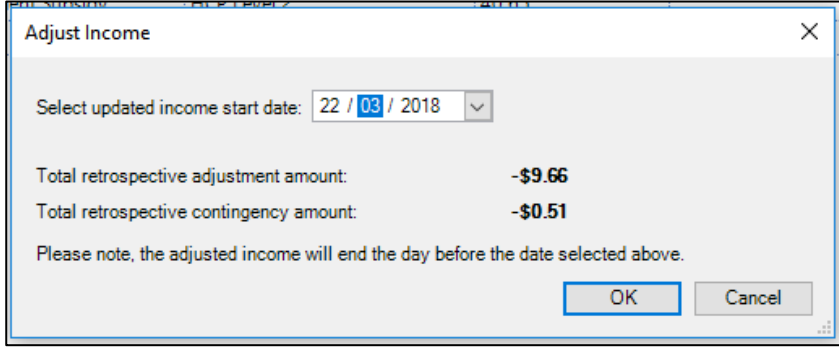
3.4 Modifying recurring income / expense

At any time, a recurring income or expense may need to be updated for the client if their circumstances change. For example, a change to the Income Tested Care Fee may need to be made, or if the client wishes for extra Case Management.

3.4.1 Adjusting recurring income / expense

Recurring income can be amended if required. Amending a recurring income will end the existing one and create a new recurring item.

1. Navigate to Client > Budget: Income and Expenses tab.
2. Right click on a recurring income and click on 'Adjust income'.
3. Enter the date the income should be updated from. Home Care Manager will calculate the total adjustment for the transaction balance and the contingency balance



Adjust Income

Select updated income start date: 22 / 03 / 2018

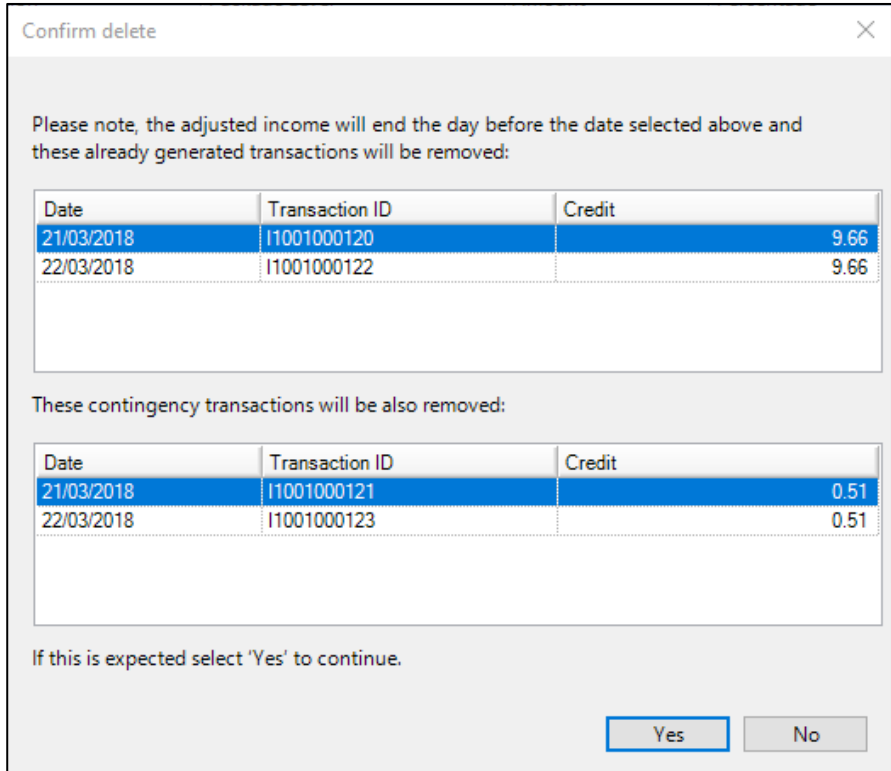
Total retrospective adjustment amount: **-\$9.66**

Total retrospective contingency amount: **-\$0.51**

Please note, the adjusted income will end the day before the date selected above.

OK Cancel

4. Click 'OK'. The Confirm Delete screen will appear. Home Care Manager will look for any transactions the adjustment will affect. Review the transactions and click 'Yes' to confirm deletion.



Confirm delete

Please note, the adjusted income will end the day before the date selected above and these already generated transactions will be removed:

Date	Transaction ID	Credit
21/03/2018	11001000120	9.66
22/03/2018	11001000122	9.66

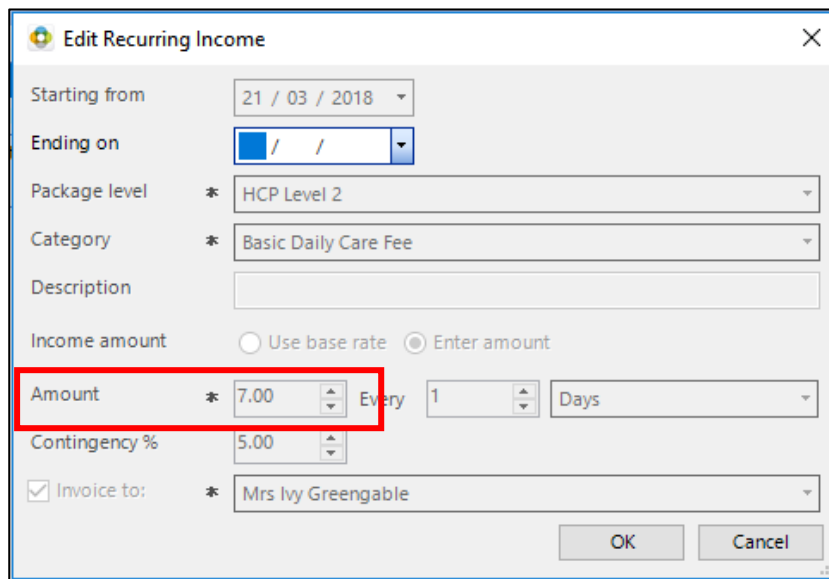
These contingency transactions will be also removed:

Date	Transaction ID	Credit
21/03/2018	11001000121	0.51
22/03/2018	11001000123	0.51

If this is expected select 'Yes' to continue.

Yes No

5. The Edit Recurring Income screen will appear. The start date will show as the adjustment date and all fields can be updated according to need. Make the changes and click 'OK'. In this example, the amount for the Daily Basic Care Fee has been changed to \$7.00.

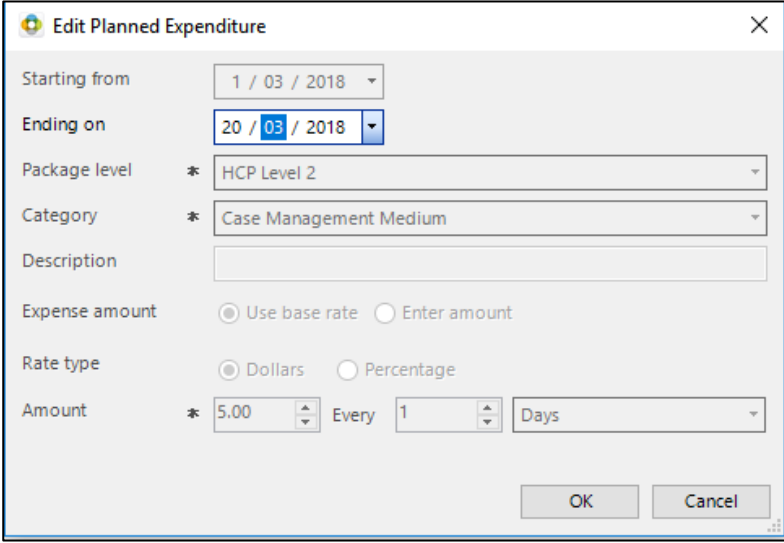


- The original recurring income has been populated with an end date and new recurring income has been added to the list.

Category	Description	Package Level	Amount	Percentage	Recurr...	Contingen...	Starting Fr...	Ending on	Invoiced To
Recurring expenses									
Case Management Medium		HCP Level 2	-5.00		Daily	0.00%	1/03/2018		
Recurring income									
Basic Daily Care Fee		HCP Level 2	10.17		Daily	5.00%	1/03/2018	20/03/2018	Mrs Ivy Greeng...
Basic Daily Care Fee		HCP Level 2	7.00		Daily	5.00%	21/03/2018		Mrs Ivy Greeng...
Income Tested Care Fee	fee advice lett...	HCP Level 2	2.60		Daily	0.00%	15/03/2018		Mrs Ivy Greeng...

3.4.2 Ending a recurring income / expense

- To end a recurring income or expense, click on the recurring item properties. Enter the end date for the recurring item and click 'OK'.



Edit Planned Expenditure

Starting from: 1 / 03 / 2018

Ending on: 20 / 03 / 2018

Package level: * HCP Level 2

Category: * Case Management Medium

Description: [Empty text box]

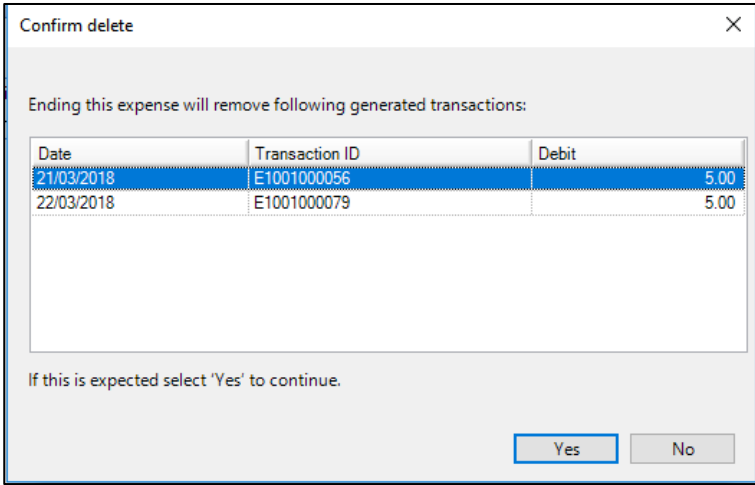
Expense amount: Use base rate Enter amount

Rate type: Dollars Percentage

Amount: * 5.00 Every 1 Days

OK Cancel

- Home Care Manager will look for any affected transactions and request confirmation to delete these. Click 'Yes' to confirm.



Confirm delete

Ending this expense will remove following generated transactions:

Date	Transaction ID	Debit
21/03/2018	E1001000056	5.00
22/03/2018	E1001000079	5.00

If this is expected select 'Yes' to continue.

Yes No

3.5 Filtering records

To hide the recurring income and expense items that have been entered, click on the 'Hide ended income and expense records' check box in the bottom left corner.

Income And Expenses									
Transactions									
Category	Description	Package Level	Amount	Percentage	Recurr...	Contingen...	Starting Fr...	Ending on	In
Recurring expenses									
Case Management Medium		HCP Level 2	-5.00		Daily	0.00%	1/03/2018	20/03/2018	
Recurring income									
Basic Daily Care Fee		HCP Level 2	10.17		Daily	5.00%	1/03/2018	20/03/2018	M
Basic Daily Care Fee		HCP Level 2	7.00		Daily	5.00%	21/03/2018		M
Income Tested Care Fee	fee advice lett...	HCP Level 2	2.60		Daily	0.00%	15/03/2018		M
Subsidy	Government S...	HCP Level 2	40.65		Daily	0.00%	1/03/2018		
Subsidy Reduction (ITCF)		HCP Level 2	-2.60		Daily	0.00%	15/03/2018		

Hide ended income and expense records

Income And Expenses									
Transactions									
Category	Description	Package Level	Amount	Percentage	Recurr...	Contingen...	Starting Fr...	Ending on	In
Recurring income									
Basic Daily Care Fee		HCP Level 2	7.00		Daily	5.00%	21/03/2018		M
Income Tested Care Fee	fee advice lett...	HCP Level 2	2.60		Daily	0.00%	15/03/2018		M
Subsidy	Government S...	HCP Level 2	40.65		Daily	0.00%	1/03/2018		
Subsidy Reduction (ITCF)		HCP Level 2	-2.60		Daily	0.00%	15/03/2018		

4 Transactions

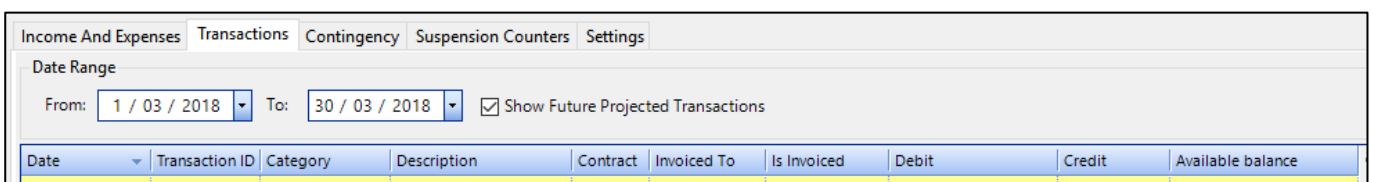
The Transactions tab lists all transactions that have occurred since the start of the budget and will occur up to the booked visits date. This includes all recurring income and expenses as they occur, visits that have been booked in for the client against the applicable contract and any adjustments that may have been entered manually. The Transaction tab determines the balance of the budget on any given day.

4.1 Understanding the transaction fields

The Transaction tab shows the following information:

- Date Range – Enter the date range for the transactions to appear.
- Show Future Projected Transactions – If this check box is ticked, transactions scheduled for the future will appear. The date range will dictate up to what date to show the projected transactions. The maximum date to see the projected transactions will correspond to the date the visits have been booked up to.
- Transaction columns:
 - a. Date – The date of the transaction.

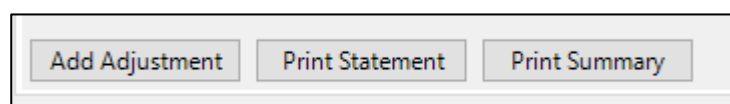
- b. Transaction ID – Home Care Manager will automatically add a Transaction ID to each line:
 - i. I transactions – Income type transactions.
 - ii. E transactions – Expense type transactions.
 - iii. V transactions – Visit type transactions.
 - iv. A transactions – Adjustment type transactions.
 - v. R transactions – Subsidy reduction transactions.
- c. Category – Identifies the income based on the type selected within the Recurring Income / Expense or Adjustment.
- d. Description – Will show as the description listed within the Recurring Income or Expense, the Visit type, Adjustment.
- e. Contract – The contract will show against visit transactions.
- f. Invoice To – Indicates who should be billed for the transaction.
- g. Is Invoiced – Indicates if a line has been invoiced or not through Home Care Manager.
- h. Debit – The amount of the transaction being deducted from the budget. Hover over this field to see this amount.
- i. Credit – The amount of the transaction being added to the budget. Hover over this field to see this amount.
- j. Available balance – Indicates the budget balance as each transaction appears.



Date	Transaction ID	Category	Description	Contract	Invoiced To	Is Invoiced	Debit	Credit	Available balance
30/03/2018		Subsidy	Equipment Subsidy					18.55	736.45

Actions which can be taken from the Transactions tab are:

- Add Adjustment – To add a one-off adjustment line to the transactions.
- Print Statement – To print a statement for the client with any given date range.
- Print Summary – To print a summary of transactions for the client with any given date range.



4.2 Reviewing the transaction entries

- Transaction lines identified in green have occurred in the past (including the current day).

- Transaction lines identified in yellow have yet to occur. These transactions will only show if the Show Future Projected Transactions check box is checked and the date range is selected for the future.
- Transaction lines identified in white are booked visits that have not been invoiced within Home Care Manager. Once the visits have been invoiced, they will appear in green.

Income And Expenses Transactions Contingency Suspension Counters Settings						
Date Range						
From: 1 / 03 / 2018		To: 30 / 03 / 2018		<input checked="" type="checkbox"/> Show Future Projected Transactions		
Date	Transaction ID	Category	Description	Contract	Invoiced To	Is Invoiced
22/03/2018	V1001000063		Visit - Personal Care	HCP2		
22/03/2018		Subsidy Reduction (ITCF)				
22/03/2018		Income Tested Care Fee	fee advice letter received 18/03/2018		Mrs Ivy Greengable	No
22/03/2018		Subsidy	Government Subsidy			
22/03/2018		Case Management Medium				
21/03/2018	V1001000071		Visit - Nursing Care - EN Medication	HCP2		
21/03/2018	I1001000028	Subsidy	Government Subsidy			
21/03/2018	R1001000007	Subsidy Reduction (ITCF)				
21/03/2018	A1001000074	Purchase	Continence Aids			
21/03/2018	I1001000035	Income Tested Care Fee	fee advice letter received 18/03/2018		Mrs Ivy Greengable	No
21/03/2018	E1001000056	Case Management Medium				
20/03/2018	V1001000070		Visit - Nursing Care - EN Medication	HCP2		
20/03/2018	V1001000062		Visit - Personal Care	HCP2		
20/03/2018	E1001000055	Case Management Medium				
20/03/2018	I1001000027	Subsidy	Government			
20/03/2018	I1001000034	Income Tested Care Fee	fee advice letter received 18/03/2018		Mrs Ivy Greengable	No
20/03/2018	R1001000006	Subsidy Reduction (ITCF)				
19/03/2018	V1001000069		Visit - Nursing Care - EN Medication	HCP2		
19/03/2018	E1001000054	Case Management Medium				

4.2.1 Adding an adjustment

Right click on any transaction line to create an adjustment against the transaction, the Make Adjustment screen will appear:

- Category – Select the appropriate category from the drop-down list.
- Amount – Enter the amount to adjust the transaction.
- Description – The description will automatically appear as 'Adjustment for... identifying the original transaction details the adjustment is being linked to.
- Type – Select the Credit or Debit option (Credit = add to balance, debit = deduct from balance).
- Date – Enter the date related to the adjustment.
- Invoice To – Select the client or client contact to bill the adjustment to if required.

Account ID	Description	Category	Amount	Balance
V1001000070	Visit - Nursing Care - EN Medication	HCP2		2.50
V1001000062	Visit - Personal Care	Personal		0.00
E1001000055	Case Management Medium			5.00
I1001000027	Subsidy	Government Subsidy		
I1001000034	Income Tested Care Fee	fee advice letter received 18/		2.60
R1001000006	Subsidy Reduction (ITCF)			2.50
V1001000069	Visit - Nursing Care - EN Med			5.00
E1001000054	Case Management Medium			
I1001000033	Income Tested Care Fee	fee advice letter received 18/		2.60
I1001000026	Subsidy	Government Subsidy		
R1001000005	Subsidy Reduction (ITCF)			2.60
I1001000032	Income Tested Care Fee	fee advice letter received 18/		5.00
E1001000053	Case Management Medium			
I1001000025	Subsidy	Government Subsidy		
R1001000004	Subsidy Reduction (ITCF)			2.60
I1001000031	Income Tested Care Fee	fee advice letter received 18/		

Make Adjustment

Category: * Visit

Amount: * 1.00

Description: Adjustment for Visit - Nursing Care - EN

Type: Credit Debit

Date: 20 / 03 / 2018

Invoice to:

Add Cancel

5 Contingency

The Contingency tab lists the transactions which have impacted the contingency balance. The settings for contingency can be set at a global level and can be individually customised for each client within their budget settings.

5.1 Individual contingency settings

If the global settings do not represent the client requirements for contingency, navigate to Client > Budget: Settings tab > Contingency Settings.

1. Enable Contingency – Tick the check box to enable contingency.
2. Min contingency value – If there is a minimum value required within the contingency budget, enter the value.
3. Contingency cap – If there is a capped value required within the contingency budget, enter the value.

Contingency Settings

Enable contingency:

Min contingency value:

Contingency cap:

Client specific contingency settings have been applied.

If contingency is not in used for the client, the contingency balance in account details will state that contingency is not in use. Similarly, if the contingency settings have been changed from the global settings, the contingency settings will state 'Client specific contingency settings have been applied'.

5.2 Contingency transactions

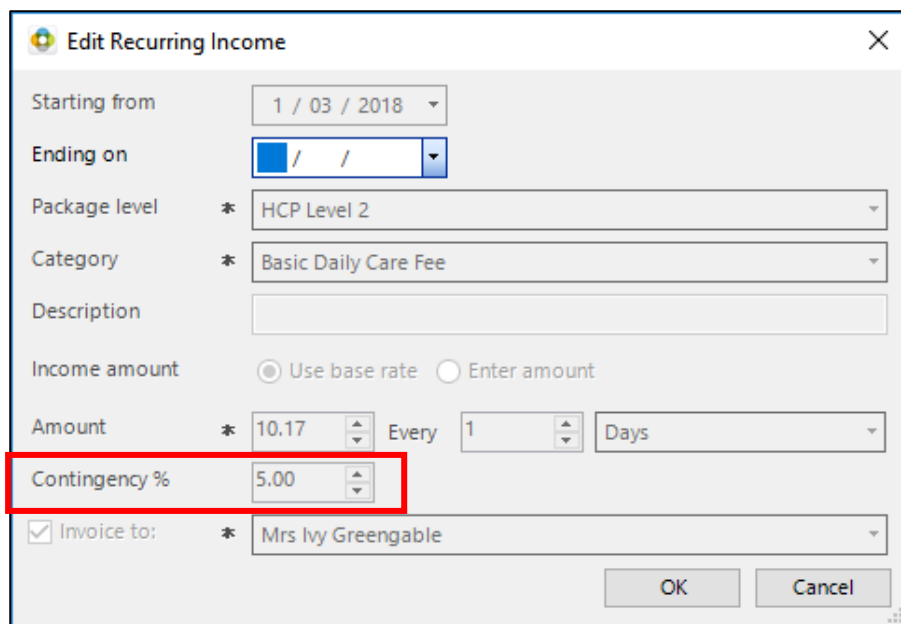
The transactions shown on the contingency tab are generated by:

- Contingency calculations on recurring income.
- Adjustments manually entered.

5.2.1 Contingency calculations on recurring income

When a Recurring Income is created in the Income and Expenses tab, the contingency percentage should be completed in the 'Contingency is required' field to be calculated and inputted into the Contingency tab.

Home Care Manager will automatically generate the contingency amount, input this into the Contingency tab and deduct the value from the recurring income transaction, effectively splitting the entire income into two portions.



Edit Recurring Income

Starting from: 1 / 03 / 2018

Ending on: / /

Package level: * HCP Level 2

Category: * Basic Daily Care Fee

Description:

Income amount: Use base rate Enter amount

Amount: * 10.17 Every 1 Days

Contingency %: 5.00

Invoice to: * Mrs Ivy Greengable

OK Cancel

For example: Mrs Greengable has nominated 5.00% of her Basic Daily Care Fee to be allocated to contingency. The Daily Basic Care Fee is set to 10.17 per day. Home Care Manager will calculate 5.00% of 10.17 (= 0.51) and add this to the contingency transactions:

Income And Expenses Transactions Contingency Suspension Counters Settings									
Date Range									
From:		22 / 02 / 2018	To:		22 / 04 / 2018				
Date	Transaction ID	Category	Description	Contract	Invoiced To	Is In...	Debit	Credit	Available b...
22/03/2018	I1001000123	Basic Daily Care Fee			Mrs Ivy Gre...	No	0.51		11.22
21/03/2018	I1001000121	Basic Daily Care Fee			Mrs Ivy Gre...	No	0.51		10.71

In addition, the transaction tab will show the Daily Basic Care Fee as the balance of the full value ($10.17 - 0.51 = 9.66$).

Income And Expenses Transactions Contingency Suspension Counters Settings									
Date Range									
From:		22 / 02 / 2018	To:		21 / 03 / 2018	<input checked="" type="checkbox"/> Show Future Projected Transactions			
Date	Transaction ID	Category	Description	Contract	Invoiced To	Is In...	Debit	Credit	Available bal...
21/03/2018	V1001000071	Multi-Nursing Care Fee					0.51		891.16
21/03/2018	I1001000120	Basic Daily Care Fee			Mrs Ivy Gr...	No		9.66	893.66
21/03/2018	I1001000035	Income Tested Care Fee	Fee advice letter received...		Mrs Ivy Gr...	No	2.60		884.00

If the Contingency Cap has been set for the client to \$2000, Home Care Manager will continue to allocate \$0.51 of the Daily Basic Care Fee until the cap is reached. Once the cap is reached, Home Care Manager will allocate 100% of the Daily Basic Care Fee to the transactions tab. When the contingency balance falls below the cap, Home Care Manager will start calculating contingency again.

If the minimum contingency value has been set for a client, an information icon is shown next to the contingency balance until the minimum is reached.

5.2.2 Utilising contingency

Contingency can be used directly from the Contingency tab by manually inputting an adjustment. For example, using contingency to make a purchase for the client would require an adjustment to be entered to debit the balance.

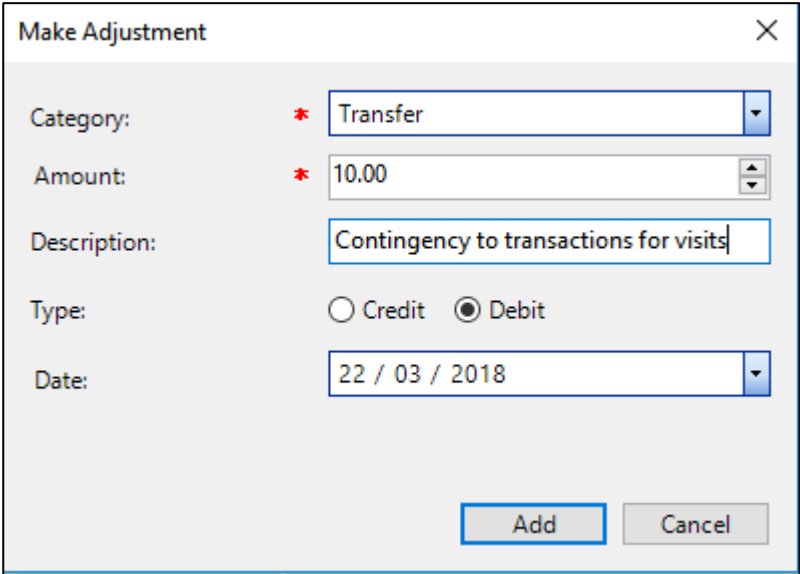
If contingency needs to be used to cover the cost of visits, then a transfer between the contingency balance and the transaction balance should be completed as visits automatically are debited from the transaction balance.

5.2.3 Transferring funds to and from contingency

Moving funds between the contingency balance and the transaction balance is categorised as Transfer. By selecting this category when making the first adjustment, Home Care Manager will automatically create a second adjustment on the alternate balance.

To transfer funds from contingency to transactions, navigate to Client > Budget: Contingency tab and select 'Add Adjustment' from the bottom left corner. The Make Adjustment screen will appear.

1. Category – Select Transfer from the drop-down list.
2. Amount – Enter the amount to be transferred from contingency to transactions.
3. Description – Enter a description or reason for the transfer.
4. Type – Select the Debit option to deduct the funds from Contingency.
5. Date – Select the date for the transaction.
6. Click 'Add'.



A confirmation screen will appear: Please confirm you wish to transfer \$10.00 from contingency to transactions. Click 'OK'. Within the Contingency tab, a debit line is created for \$10.00:

Income And Expenses									
Transactions									
Contingency									
Suspension Counters									
Settings									
Date Range									
From:		22 / 02 / 2018	To:		22 / 04 / 2018				
Date	Transaction ID	Category	Description	Co...	I	Is In...	Debit	Credit	Available balance
22/03/2018	I1001000123	Basic Daily Care Fee				M:No		0.51	1.22
22/03/2018	T1001000124	Transfer	Contingency to transactions for visits (Transfer to transactions)				10.00		0.71
21/03/2018	I1001000121	Basic Daily Care Fee				M:No		0.51	10.71

Home Care Manager will automatically add a credit line to the Transaction tab:

Income And Expenses Transactions Contingency Suspension Counters Settings									
Date Range									
From:		22 / 02 / 2018	To:		22 / 03 / 2018	<input checked="" type="checkbox"/> Show Future Projected Transactions			
Date	Transaction ID	Category	Description	Co	Invoiced To	Is In...	Debit	Credit	Available bal...
22/03/2018	V1001000072		Visit - Nursing Care - EN Medication	HC			2.50		938.97
22/03/2018	V1001000063		Visit - Personal Care	HC			5.00		941.47
22/03/2018	I1001000122	Basic Daily Car...			Mrs Ivy G...	No		9.66	946.47
22/03/2018	I1001000078	Income Tested	fee advice letter received 18/03/2018		Mrs Ivy G...	No		2.60	936.81
22/03/2018	T1001000125	Transfer	Contingency to transactions for visits (Transfer from contingency)					10.00	934.21
22/03/2018	R1001000076	Subsidy REDUC...					2.60		924.21

Note: To move funds from Transactions to Contingency, follow the same steps starting from Add Adjustment from the Transaction tab.

6 Suspension Counters

The Suspension Counters tab lists the suspensions occurring from the contract linked to the budget. When suspensions are actioned under Care Plan Planning, the balances are updated within the budget to control the income and possible income reduction required.

Refer to the *2.2 Suspensions and Suspension Counters* document for further details.

6.1 Income reduction counters

In the top right corner of the Budget screen, 25% income reduction counters are identified. The number of days recorded against each of the suspension types is the balance to date for the financial year.

HCP – Hospital

HCP – Transition Care

The government subsidy is paid in full up to 28 consecutive days of hospital or transition care leave in a financial year. After 28 consecutive days is reached, Home Care Manager will reduce income to 25%. When the suspension is ended, the year to date balance will revert to zero and income will resume back to 100%.

HCP – Residential Respite Care

HCP – Social

The government subsidy is paid in full up to 28 cumulative days of respite or social leave in a financial year. After 28 cumulative days is reached, Home Care Manager will reduce income to 25%. When suspensions are ended for respite and social leave, balances will remain to continue to count the leave for the entire financial year.

The counters will revert to zero if the client changes package level within the financial year.

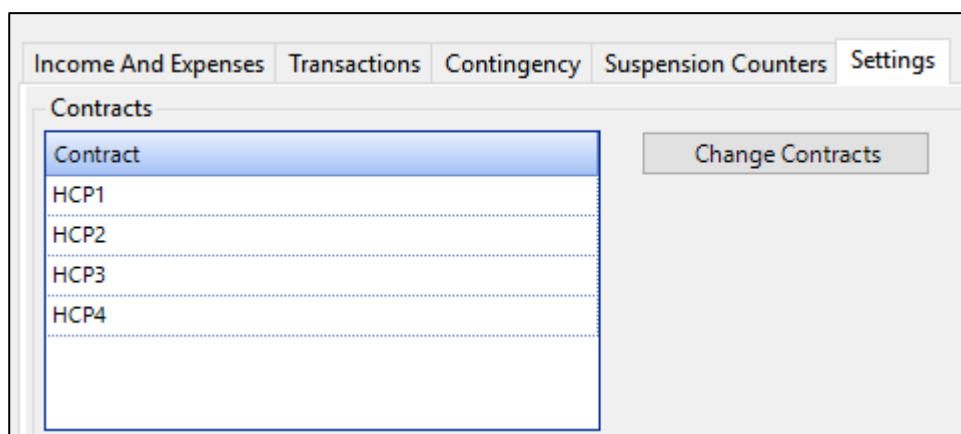
Suspension type	# of days
HCP - Hospital	0
HCP - Transition Care	0
HCP - Residential Respite C...	0
HCP - Social	0

7 Settings

7.1 Contracts

During the creating budget process, contracts were selected to link them to the budget. These contracts can be managed from the Settings tab.

The Contracts box will show the contracts are linked to the budget.



To update the contracts list, click on Change Contracts.

1. Select All Contracts – Select this bullet if all contracts should be linked to budget.
2. Choose Specific Contracts – Click on select and check the contracts from the Multi Select screen.

3. Click Ok, this will update the list of contracts within the Choose Specific Contracts field.
4. Click OK to confirm the changes.

