

Overview

Microsoft Dynamics 365 for Aged Care Supporting 2025 Reforms

Updated 27 December 2024



Business Applications



Modern Work

Microsoft
Partner



Gold Enterprise Resource Planning
Gold Small and Midmarket Cloud Solutions
Silver Cloud Customer Relationship Management



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Agenda

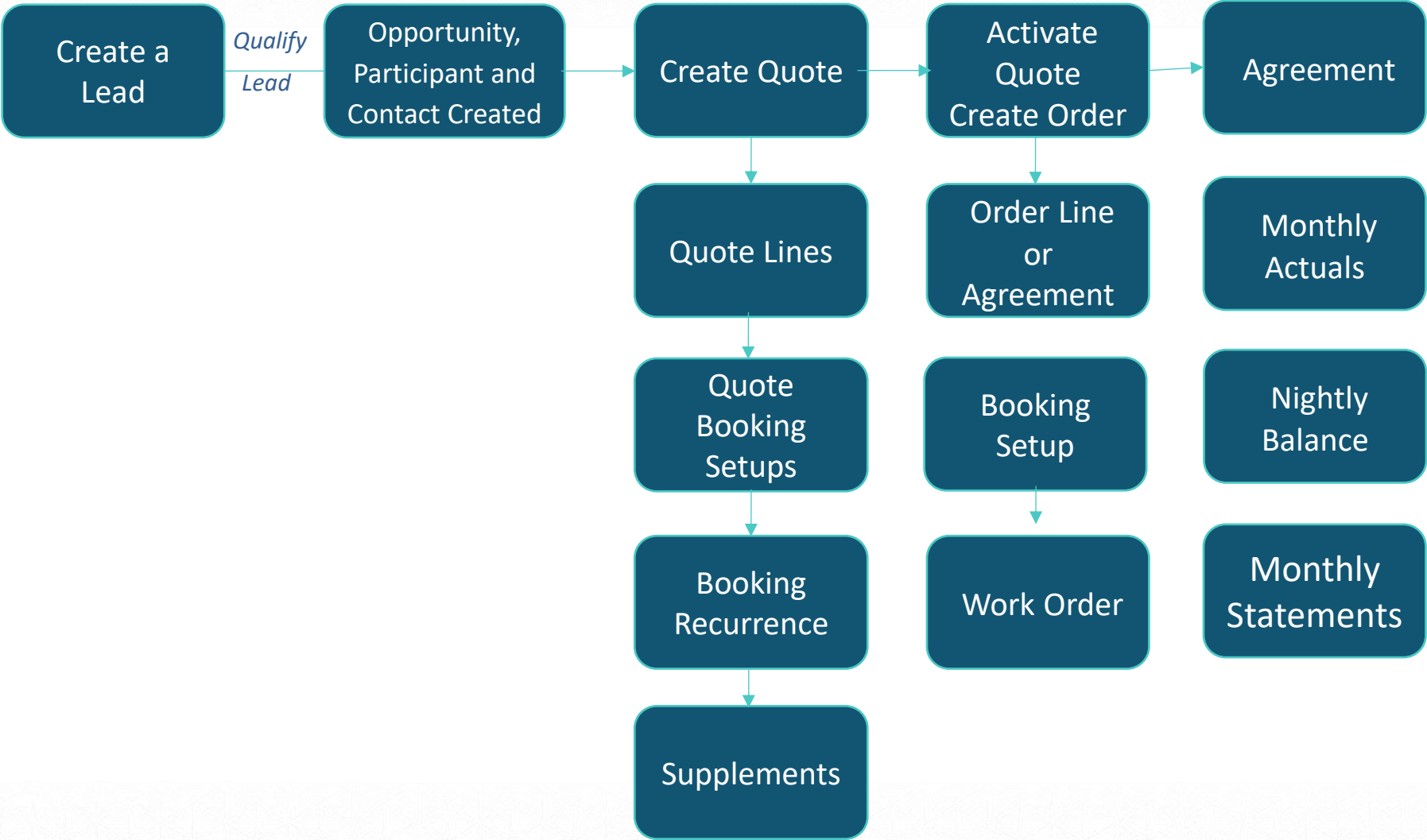
- > Purpose
- > Aged Care Process Flow
- > Components
- > Step by Step Process



Purpose

This document provides guidance on managing the 2025 Aged Care Reform processes within Microsoft Dynamics 365. The guide will help ensure that Dynamics 365 users can effectively deliver services, leading to better client outcomes and efficient service delivery.





← Back to solutions

HCP Solution

Overview

Objects

History

Pipelines

Search

All (29)

Agents (0)

Apps (1)

Cards (0)

Choices (3)

Cloud flows (5)

Connection references (4)

MetadataForArchival (1)

Processes (1)

Site maps (1)

Tables (12)

Account

Balance

HCP Claims

Lead

Monthly Actual Fee

Non Chargeable

Opportunity

Product/Support/Service

Quote

Quote Line

Service Agreement



Supplements

Web resources (1)

Code (1)

HCP Solution > All

Display name ↑	Name ↓	Type ↓	Managed ↓	Customized ↓	Last Modif... ↓
account	account	MetadataForArchival	No	Yes	3 months ago
Account	account	Table	Yes	Yes	3 months ago
Balance	d365_balance	Table	No	Yes	3 days ago
Check Daily HCP Balance of Agreement [Sched...	Check Daily HCP Balance of Agreement [Scheduled]	Cloud Flow	No	Yes	6 days ago
Child Flow - Monthly Actual Fee Calculation [M...	Child Flow - Monthly Actual Fee Calculation [Manual]	Cloud Flow	No	Yes	18 hours ago
Funding Management Type	d365_fundingmanagementsource	Choice	No	Yes	-
Funding Source	d365_fundingsource	Choice	No	Yes	-
Get Response from Monthly Flow [Manual]	Get Response from Monthly Flow [Manual]	Cloud Flow	No	Yes	2 days ago
HCP App	d365_HCPApp	Site Map	No	Yes	3 days ago
HCP App	d365_HCPApp	Model-Driven App	No	Yes	3 days ago
HCP Claims	d365_hcpclaims	Table	No	Yes	3 weeks ago
HCP Quote Line	d365_HCPQuoteLine.js	Web Resource (JScript)	No	Yes	1 day ago
Lead	lead	Table	Yes	Yes	3 months ago
Microsoft Dataverse HCPSolution-c1919	d365_sharedcommondataserviceforapps_c1919	Connection Reference	No	Yes	3 weeks ago
Monthly Actual Fee	d365_monthlyactualfee	Table	No	Yes	3 weeks ago
Non Chargeable	d365_nonchargeable	Table	No	Yes	2 weeks ago
Office 365 Outlook HCPSolution-6926b	d365_sharedoffice365_6926b	Connection Reference	No	Yes	3 days ago

 Dynamics 365 | HCP App

☰

HCP Process

📄

Participants

⚙️

Leads

📄

Opportunities

📄

Quotes

📄

Quote Lines

📄

Service Agreements

Service

📄

Supports

👤

Bookings

📅

Schedule Board

📄

Shift Notes

⚠️

Incidents

📄

Risk Assessments

📄

Risk Reviews

📄

Risks

Custom

📄

Supplements

📄

Monthly Actual Fe...

📄

HCP Claims

📄

Non Chargeables

←

📄 Focused view

📊 Show Chart

➕ New

🗑️ Delete

▼

Active Participants ▼

☐

Account Name ↑ ▼

☐

Annette Baird

☐

Benq

☐

Jenny Gilbert

☐

Jim Brown

☐

John Smith

☐

Michelle Grey

☐

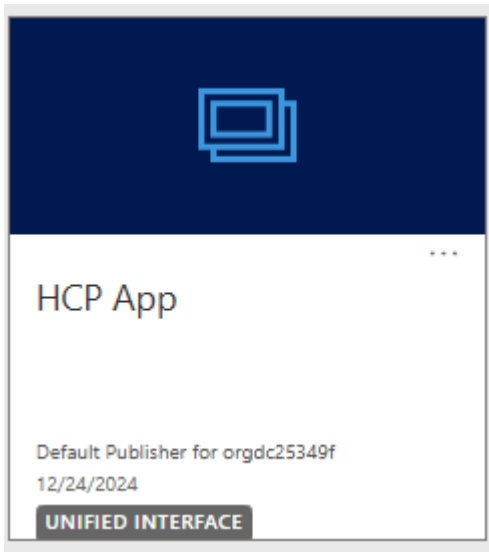
Rany Sen

☐

Sentt Josephh

Rows: 8

Model Driven App



Cloud Flows

- All (29)
- Agents (0)
- Apps (1)
- Cards (0)
- Choices (3)
- Cloud flows (5)**
- Connection references (4)
- MetadataForArchival (1)
- Processes (1)
- Site maps (1)

HCP Solution > Cloud flows

	Display name ↑ ↓
	Check Daily HCP Balance of Agreement [Scheduled]
	Child Flow - Monthly Actual Fee Calculation [Manual]
	Get Response from Monthly Flow [Manual]
	When agreement is created [Trigger]
	Work Order - Generate Monthly Invoice [Scheduled]

Workflow

This flow sets the name of the supplement based on the selected Supplement Type.

Search

All (29)

Agents (0)

Apps (1)

Cards (0)

Choices (3)

Cloud flows (5)

Connection references (4)

MetadataForArchival (1)

Processes (1)

Site maps (1)

> Tables (12)

> Web resources (1)

HCP Solution > Processes

Display name ↑ ↓

Populate Supplement Name

Webresource

This JavaScript web resource calculate the package level contribution daily fee for the quote line based on the selected funding level amount.

Search

All (29)

Agents (0)

Apps (1)

Cards (0)

Choices (3)

Cloud flows (5)

Connection references (4)

MetadataForArchival (1)

Processes (1)

Site maps (1)

> Tables (12)

> Web resources (1)

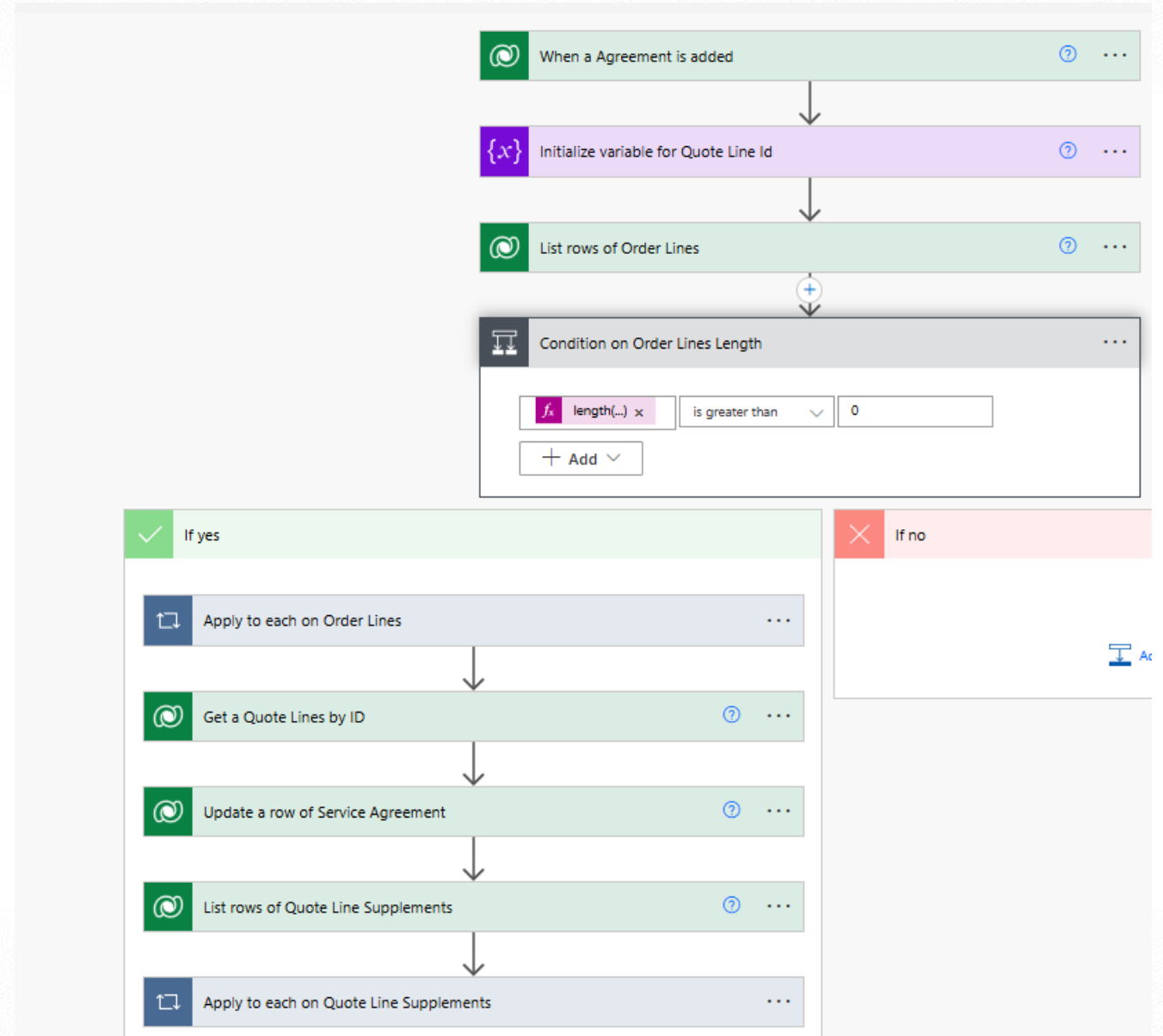
HCP Solution > Web resources

Display name ↑ ↓

HCP Quote Line

When agreement is created [Trigger]

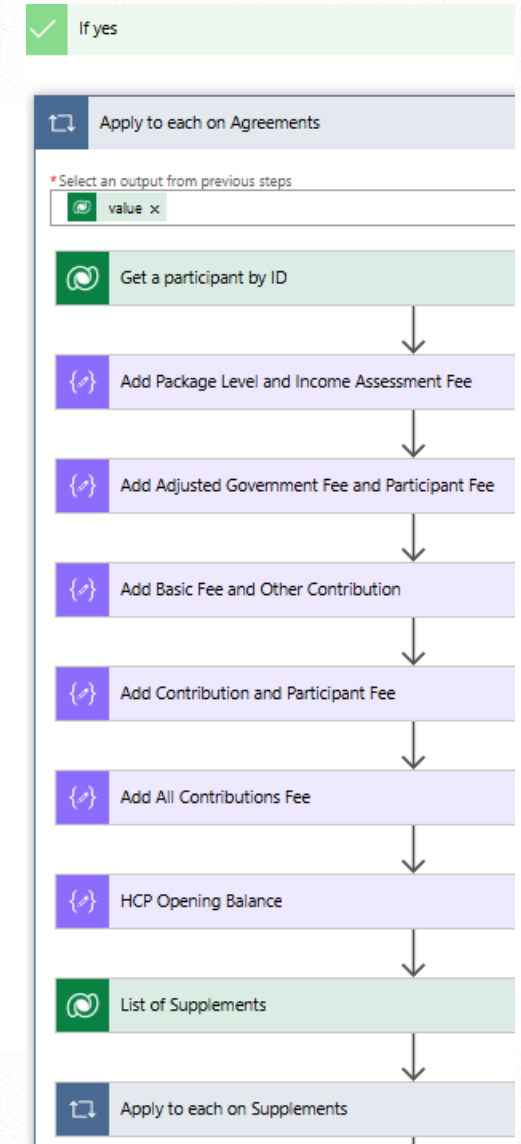
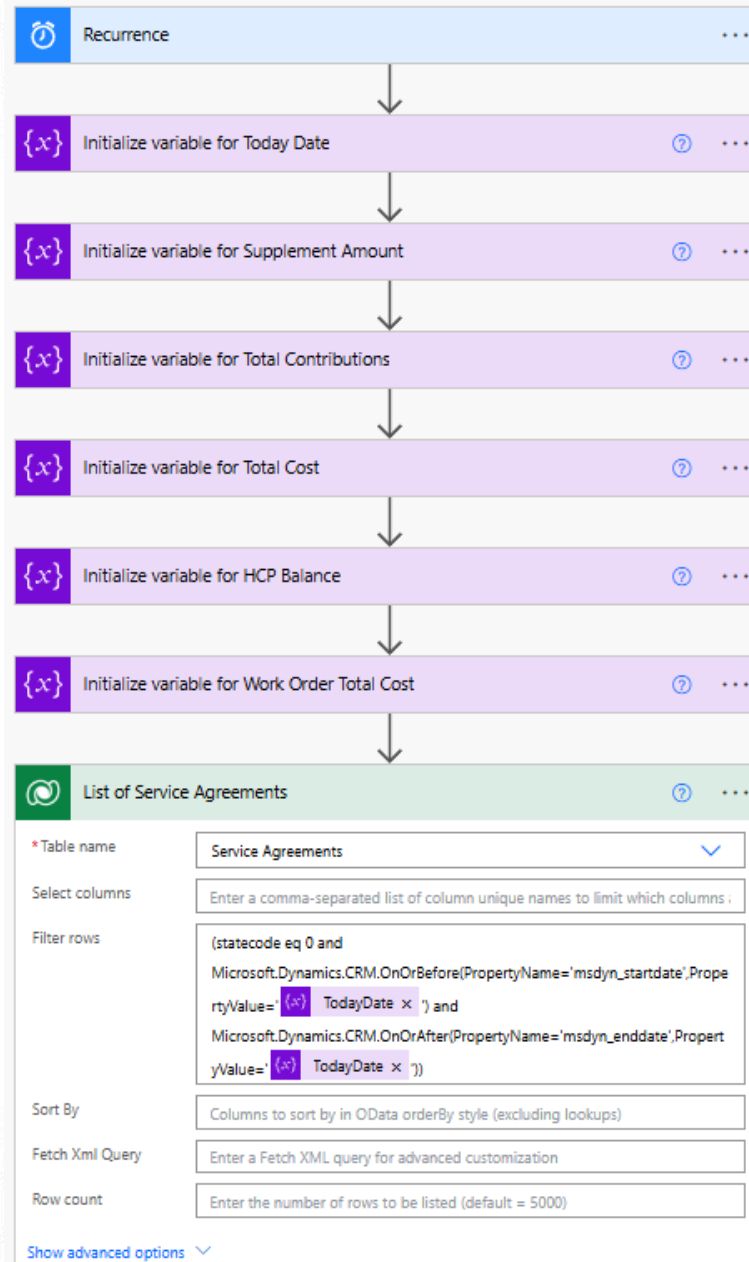
This is a trigger-based flow that activates when an agreement is created. It retrieves custom values from the Quote Line and Quote Line Supplements and updates them in the Agreement.



Aged Care – Daily Balance Flow

Check Daily Aged Care Balance of Agreement [Scheduled]

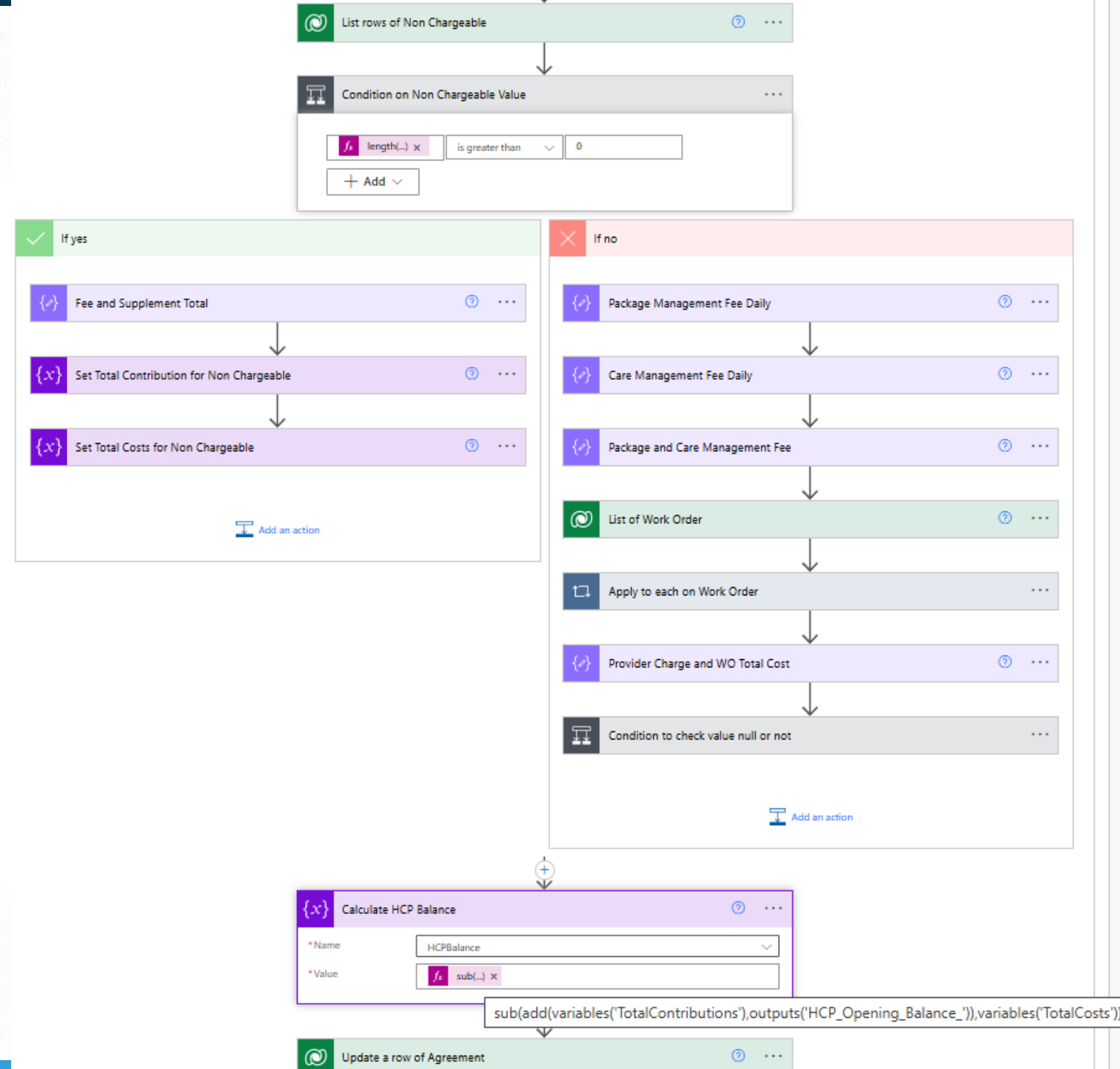
This is a scheduled flow that runs nightly to calculate the Aged Care balance of the agreement based on daily fee contributions, provider charges, and posted work orders.



Flow Customization

Check Daily Aged Care Balance of Agreement [Scheduled]

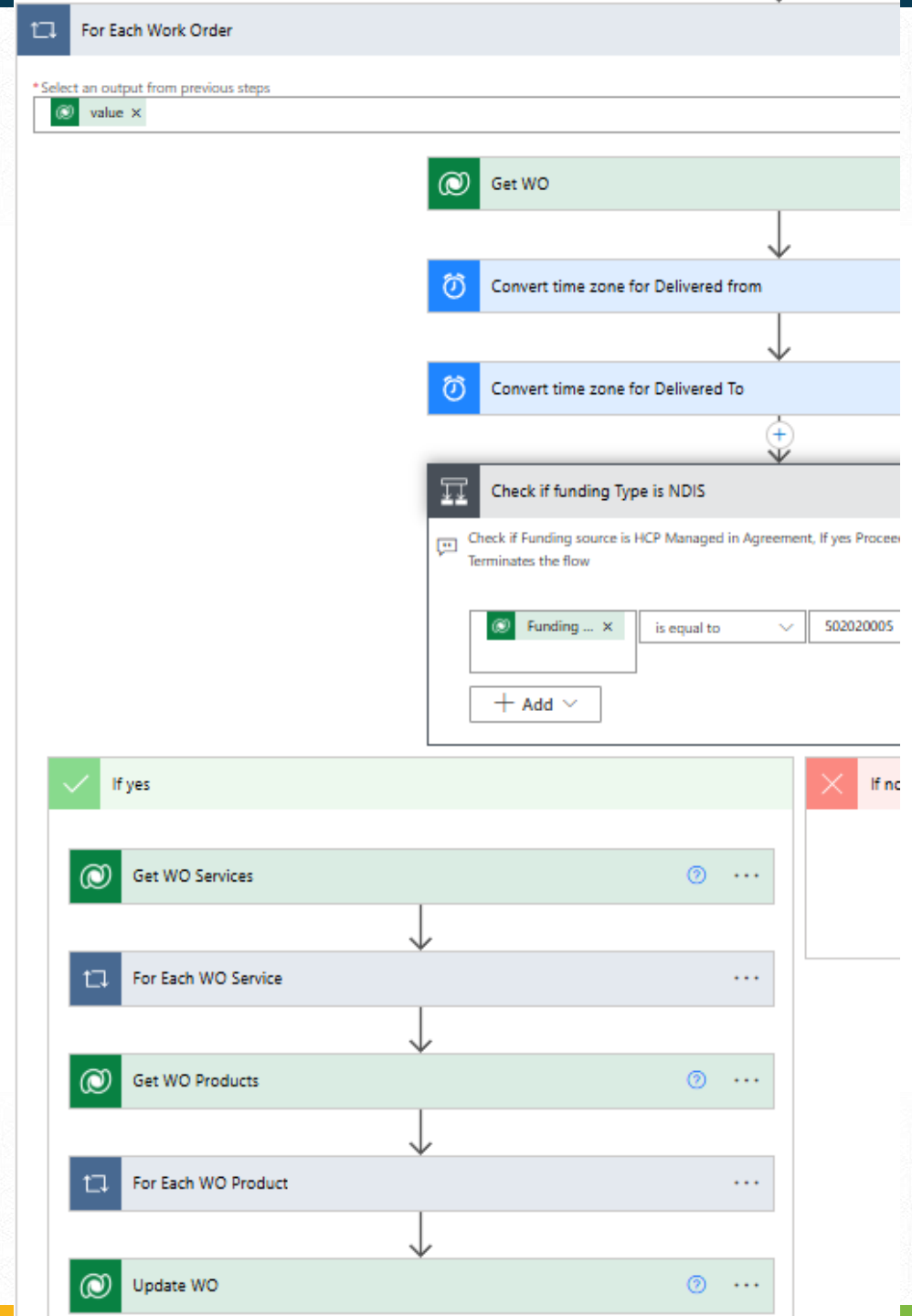
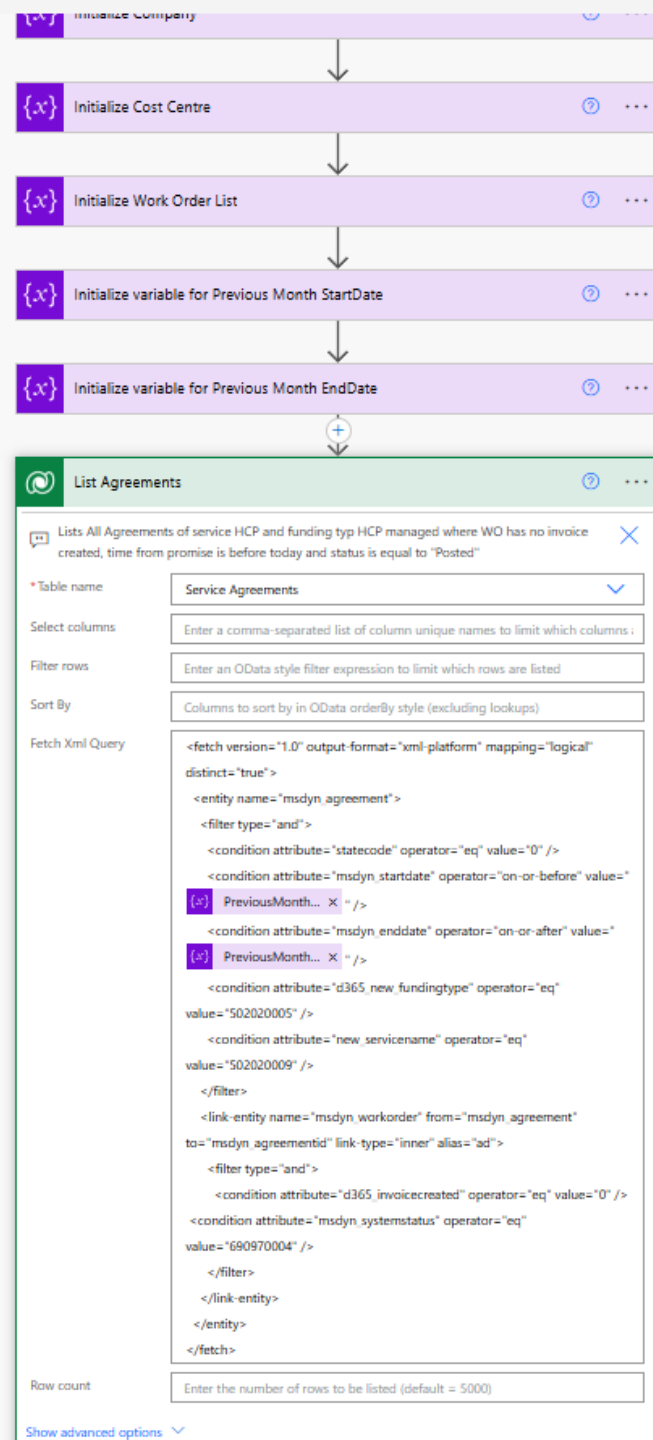
And If a non-chargeable entry is made for the participant, only the daily fee contribution will be calculated.



Flow Customization

Work Order - Generate Monthly Invoice [Scheduled]

This is a scheduled process that runs at the end of each month to create an invoice and invoice product, provided a work order has been posted.



Flow Customization

Child Flow - Monthly Actual Fee Calculation [Manual]

This is a manual process that runs after creation of invoice at the end of the month to calculate the monthly totals for daily fee contributions, provider charges, services, products, and other items. It generates a monthly record for each item type and creates a monthly statement based on this data.

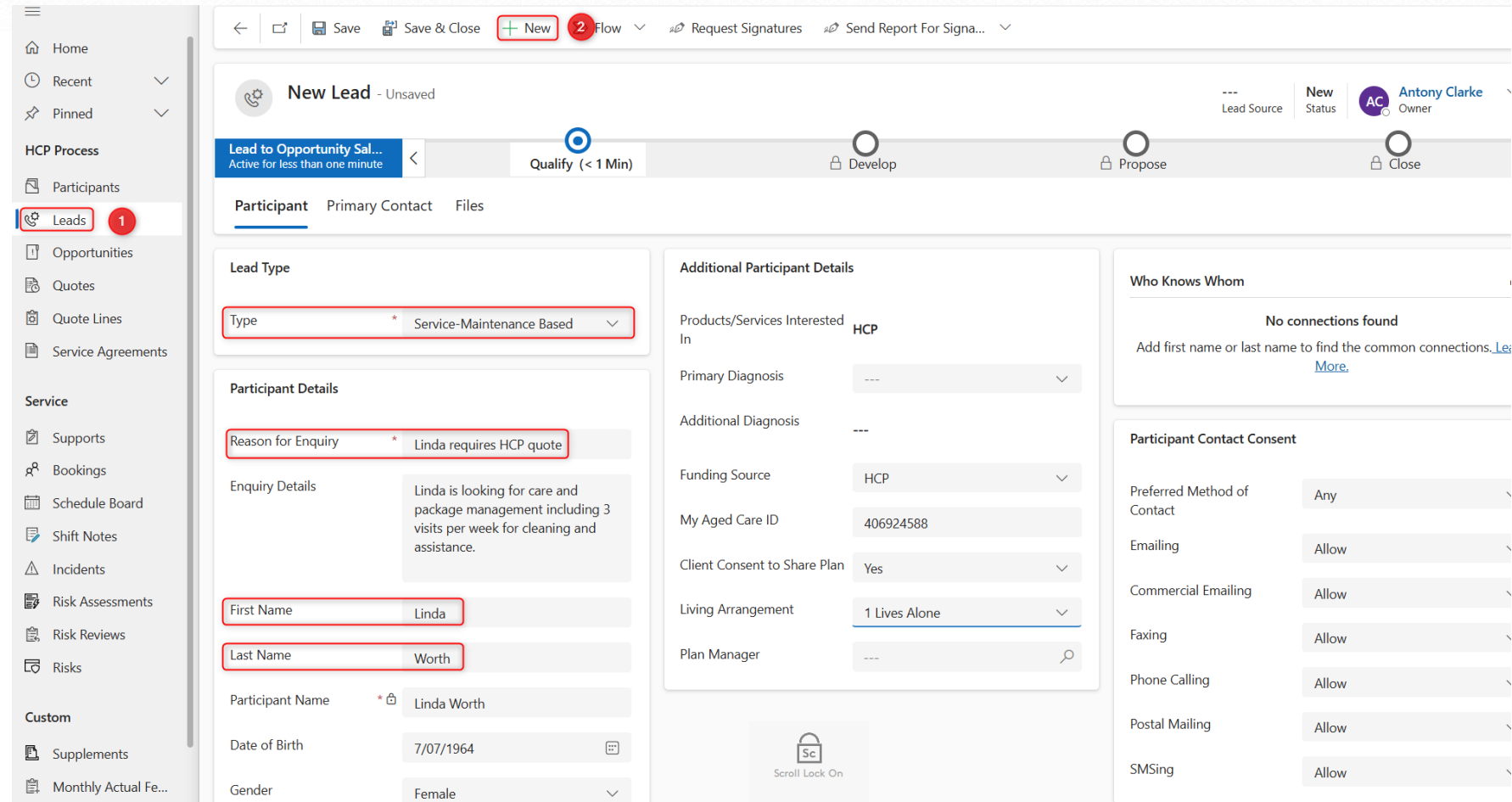


Create a Lead

Leads can be generated via website, imported lists and manually.

Minimum fields required are below, other fields can be added removed as required.

- **Type:** Service Maintenance-Based
- Reason (Lead Title)
- Enquiry Details
- First Name
- Last Name
- **Products / Services:** Aged Care
- **Funding Source:** Aged Care
- My Aged Care ID



New Lead - Unsaved

Lead Source: --- New Status: AC Antony Clarke Owner

Lead to Opportunity Sal... (Active for less than one minute) | Qualify (< 1 Min) | Develop | Propose | Close

Participant | Primary Contact | Files

Lead Type

Type * Service-Maintenance Based

Participant Details

Reason for Enquiry * Linda requires HCP quote

Enquiry Details: Linda is looking for care and package management including 3 visits per week for cleaning and assistance.

First Name: Linda

Last Name: Worth

Participant Name * Linda Worth

Date of Birth: 7/07/1964

Gender: Female

Additional Participant Details

Products/Services Interested In: HCP

Primary Diagnosis: ---

Additional Diagnosis: ---

Funding Source: HCP

My Aged Care ID: 406924588

Client Consent to Share Plan: Yes

Living Arrangement: 1 Lives Alone

Plan Manager: ---

Who Knows Whom

No connections found

Add first name or last name to find the common connections. [Learn More](#)

Participant Contact Consent

Preferred Method of Contact: Any

Emailing: Allow

Commercial Emailing: Allow

Faxing: Allow

Phone Calling: Allow

Postal Mailing: Allow

SMSing: Allow

Aged Care - Onboarding

Create a Lead

If required a Primary Contact can be created such as a partner, sibling or guardian.

They will be created as a contact and related to the participant as a primary contact.

In the Aged Care App we have multiple ways to store relationships such as connections or lookups.

Minimum fields for the primary contact:

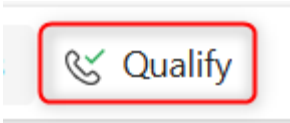
- First Name
- Last Name

The screenshot displays the d365 Global Aged Care Onboarding interface. On the left is a navigation menu with categories: HCP Process (Participants, Leads), Service (Supports, Bookings, Schedule Board, Shift Notes, Incidents, Risk Assessments, Risk Reviews, Risks), and Custom (Supplements, Monthly Actual Fe..., HCP Invoices). The 'Leads' section is active. The main area shows a lead for 'Linda Worth' with a 'Lead' status and a 'Qualify (< 1 Min)' button. Below this is a tabbed interface with 'Participant', 'Primary Contact', 'Files', and 'Related'. The 'Primary Contact' tab is selected, showing a form with fields for First Name (James), Last Name (Worth), Other, Relationship to Participant (Sibling), Email, Mobile Phone (0455668899), Business Phone, Street 1 (18 Hews Parade), Street 2, Street 3, City (Belrose), and State/Province (NSW). The first and last name fields are highlighted with red boxes.

Qualify a Lead

Once it's determined the lead should be qualified to create a quote click the “Qualify” button to qualify the lead then confirm which will create an:

- Opportunity
- Account (Participant record)
- Contact (based on primary contact from lead guardian etc)



Qualify lead

Create or link related records for this lead.

Account ⓘ

Linda Worth

Account will be automatically created as per org settings.

Contact ⓘ

James Worth

Contact will be automatically created as per org settings.


Opportunity ⓘ

Opportunity 1

Linda requires HCP quote


Opportunity will be automatically created as per org settings.

Qualify


 Lead qualified

The following records have been linked.


Account


 [Linda Worth](#)

Contact

 [James Worth](#)

Opportunity

 [Linda requires HCP quote](#)

 Lead qualification details ⓘ

- 1 opportunity [Linda requires HCP quote](#) has been created during qualification.
- The stakeholder involved is identified as [James Worth](#).
- The lead topic is regarding a quote required by Linda for HCP.
- Any method of contact is preferred for communication regarding this lead.
- This lead was created on 31/12/2024 at 1:43 PM.
- The parent account associated with the lead has a primary contact listed as [James Worth](#) and an account name of [Linda Worth](#).
- There are open opportunities with the parent account related to the topic [Linda requires HCP quote](#).

Finish

Aged Care – Onboarding Opportunity



After qualifying lead an Opportunity and a Participant (account) and contact will be created.

You will be navigated to the new Opportunity at the Develop stage.

Populate fields including Budget, Est. Close Date and Est. Revenue to track your pipeline.

Dynamics 365
HCP App

SANDBOX

Home
Recent
Pinned
HCP Process
Participants
Leads
Opportunities
Quotes
Quote Lines
Service Agreements
Service
Supports
Bookings
Schedule Board
Shift Notes
Incidents
Risk Assessments
Risk Reviews
Risks
Custom
Supplements
Monthly Actuals

Linda requires HCP quote - Unsaved
Opportunity

Lead to Opportunity Sal...
Active for 6 minutes

Qualify
Develop (< 1 Min)

Summary
Quotes
Related

Assessment Type

Type
Service-Maintenance Based

Assessment Information

Topic
Linda requires HCP quote

Description
Linda is looking for care and package management including 3 visits per week for cleaning and assistance.

Participant
Linda Worth

Related Contact
James Worth

Support Category
HCP

Currency
Australian Dollar

Budget Amount
\$5,800.00

4/01/2025
Est. Close Date
In Progress
Antony Clarke

Est. Close Date
4/01/2025

Est. Revenue
5800

Status
In Progress

Owner
Antony Clarke (Off)

Enter a note...

Highlights

Recent
Auto-post on Lead Linda Worth: 1:49 PM
- 1 opportunity Linda requires HC... has been created during qualification.
- The stakeholder involved is identified as James Worth.
- The lead topic is regarding a quote required by Linda for HCP.
- Any method of contact is preferred for communication regarding this lead.
- This lead was created on 31/12/2024 at 1:43 PM.
- The parent account associated with the lead has a primary contact listed as James Worth and an account name of Linda Worth.
- There are open opportunities with the parent account related to the topic Linda requires HC...
Auto-post on Lead Linda Worth: 1:49 PM
Lead qualified by Antony Clarke and converted to Account Linda Worth.Contact James Worth.Opportunity Linda requires HC...
Auto-post on Opportunity Linda requires HCP q... 1:49 PM
Opportunity created by Antony Clarke for Account Linda Worth

Aged Care - Onboarding

Create a Quote

On the Opportunity table go to Quote tab.

- Select “New Quote” button

Linda requires HCP quote - Saved
Opportunity

4/01/2025
Est. Close Date

\$5,800.00
Est. Revenue

In Progress
Status

AC

Antony Clarke
Owner

Lead to Opportunity Sal...
Active for 6 minutes

Qualify

Develop (< 1 Min)

Propose

Close

Summary

Quotes

 Related

Quotes

+ New Quote

Refresh

Flow

Quote Title ↑	Effective from	Quote Expires On	Estimated Cost	Estimated Margin	Status	TotalAmount
---------------	----------------	------------------	----------------	------------------	--------	-------------

Aged Care - Onboarding

Create a Quote

Quote will be prefilled with data as shown.

Number of Weeks populated from Quote Line.

Multiple Price Lists can be created for use in quotes.

Provide values:

- Description
- Price List
- Effective from
- Effective to

Navigate to Quote Lines tab.

Home

Recent

Pinned

HCP Process

Participants

Leads

Opportunities

Quotes

Quote Lines

Service Agreements

Service

Supports

Bookings

Schedule Board

Shift Notes

Incidents

Risk Assessments

Risk Reviews

Risks

Custom

Supplements

Save

Save & Close

New

Delete

Refresh

Check Access

Export to PDF

Share

Linda requires HCP quote - Saved

AC Antony Clarke Owner

\$0.00
Total Amount w/ Travel Items

31/12/2024
Effective From

21/01/2025
Effective To

Summary

Quote Lines

Related

QUOTE INFORMATION

Quote Title

Linda requires HCP quote

Description

Quote for Linda for home services and paackages

Potential Client

Linda Worth

Linked Opportunity

Linda requires HCP quote

Price List

Demo List

Number of Weeks

Record Details

Currency

Australian Dollar

Quote ID

QUO-0001027

Revision ID

0

Aged Care - Onboarding

Create a Quote Line/s

A Quote Line will generate an agreement when activated and an order is created.

Typically, a participant will have one quote line / agreement.

Linda requires HCP quote - Saved

Quote

Summary

Quote Lines

Related

AC

Antony Clarke

Owner

\$0.00

Total Amount w/ Travel Items

31/12/2024

Effective From

21/01/2025

Effective To

Pricing Details

Total Amount w/ Travel Items

\$0.00

Last updated:

31/12/2024 2:00 PM

Agreement-Based Lines

+ Add New Quote Line

Refresh

Write-I...

Agreem...

Service ...

Service ...

Start ...

End Date

Duration

Currency

Services...

Taxable

Sa

Aged Care - Onboarding



Create a Quote Line

Create a new Quote Line:

- Add Description of Service
- **Service Name:** Aged Care
- **Funding Source:** Aged Care
- **Funding Management Type:** Aged Care Managed
- Start Date
- End Date
- Service Price List
- Cost Centre (if required)
- Company (if required)

New Quote Line - Unsaved

General Quote Booking Setup Quote Line Supplements

Quote *   [Linda requires HCP quote](#)


Description of Service * [Linda Quote Home Care](#)


Description

Home care 3 days a week duration 2 hours. Mon, Wed and Fri


Start Date 1/01/2025


End Date 31/12/2025


Duration  365 days

Services Price List  [Demo List](#) ×

Extended Amount w/ Travel Last updated: Not Available

Cost Centre *  [Demo Cost 1](#) ×

Company *  [Company-1](#) ×

Service Account *  [Linda Worth](#) ×

Service Name * HCP

Funding Source * HCP

Funding Management Type * HCP Managed

Aged Care - Onboarding

Create a Quote Line (Funding and Fees)

Create a new Quote Line:

Select the Funding Level 1, 2 or 3

Add other fees

- Income Daily Fee
- Participant Contribution
- Basic Daily Fee
- Other Contribution

Add Provider % fees

- Case Management Fee
- Package Management Fee

These are capped at the maximum daily % 20 and 15.

On Save of the quote line calculations will be present.

Government Contribution

Select Funding Level *

Level 1 - Basic care needs – \$10,588.65 a year X

Package Level Contribution Daily\$29.01

Income Assessment Fee Daily\$3.25

Adjusted Government Fee\$25.76

Annual Package Level Contribution\$10,588.65

Annual Income Assessment Fee\$1,186.25

Annual Adjusted Government Fee\$9,402.40

Participant Contribution

Participant Contribution\$0.00

Basic Daily Fee\$0.00

Other Contribution\$0.00

Annual Participant Contribution

Annual Basic Daily Fee

Annual Other Contribution

Provider Charges

Care Management Fee %15

Package Management Fee %15

Care Management Fee Daily\$4.35

Package Management Fee Daily\$4.35

Annual Care Management Fee\$1,588.30

Annual Package Management Fee\$1,588.30

Create a Quote Line (Booking Setup)

Create a new Quote Line Booking Setup for each service that is going to be delivered.

For a Home Care service delivered 3 times a week for 2 hours 1 Booking setup is required.

Linda Quote Home Care - Saved

Quote Line

General

Quote Booking Setup

Quote Line Supplements

Related

+ New Quote Booking S...

Refresh

Flow

Name	Description	Estimated Cost	Estimated Revenue w/ Travel
<div></div>			

Aged Care - Onboarding

Create a Quote Line (Booking Setup)

Add financial details:

- Booking Setup Name
- Select Booking Type
- **Select Support Category:** Aged Care
- Select Preferred resource
- Enter Estimated Duration
- Set Preferred Start Time
- Auto Generate Booking
 - Yes if to create Bookings automatically

Setting resource will automatically create bookings for the resource.

Public Holiday can update for services that are required on public holidays.

New Quote Booking Setup - Unsaved

General

SUMMARY

Booking Setup Name *3 visits weekly

DescriptionHome Care service delivered 3 times a week for 2 hours

Quote ID *

Estimated Revenue w/ Travel

Booking Type *Shift

BOOKING SETTINGS

Auto Generate Booking *

Yes

Is Public Holiday Product Update Required?

Yes

Estimated Duration *2 hours

Preferred Resource *

Vipul Vishwas

Preferred Start Time *10:30 AM

Travel Charge Required?

No

WORK ORDER SETTINGS

Support Category *

HCP

Auto Generate Work Order *

Yes

Generate Work Order Days In Advance

Work LocationOnsite

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Your Dynamics 365 Project Partner | 24

Aged Care - Onboarding

Create a Quote Line (Booking Setup)

Add financial details:

- Booking Setup Name
- Select Booking Type
- **Select Support Category:** Aged Care
- Select Preferred resource
- Enter Estimated Duration
- Set Preferred Start Time
- Auto Generate Booking
 - Yes if to create Bookings automatically

Setting resource will automatically create bookings for the resource.

Public Holiday can update for services that are required on public holidays.

Next we add **services** and if required **products** to be billed.

3 visits daily - Saved
Quote Booking Setup

Antony Clarke
Owner

General Related

Once saved this will be available to add the service required

SUMMARY

Booking Setup Name * 3 visits daily

Description Home Care service delivered 3 times a week for 2 hours

Quote ID * Linda requires HCP quote

Estimated Revenue w/ Travel \$0.00

Booking Type * Shift

BOOKING SETTINGS

Auto Generate Booking * Yes

Is Public Holiday Product Update Required? Yes

Estimated Duration * 2 hours

Preferred Resource * Vipul Vishwas

Preferred Start Time * 10:00 AM

Travel Charge Required? No

WORK ORDER SETTINGS

Support Category * HCP

Auto Generate Work Order * Yes

Generate Work Order Days In Advance

Work Location Onsite

Services to be Billed

+ New Quote Booking Service

Refresh

Flow

Run Report

Excel Templates

Export Quote Booking Serv...

See associated records

0 - 0 of 0

Page 1

Products to be Billed

No data available

Create a Quote Line (Booking Service)

For quote booking service add the service required and adjust duration if required it will be set from Quote Booking Setup.

Save

Save & Close

Flow

Send Report For Signa...

New Quote Booking Service - Unsaved

General

Service

HCP Assistance Cleaning

Unit

Primary Unit

Duration

2 hours

Ratio

1:1

Billable Duration

2 hours

Unit Price

\$67.55

Estimated Service Cost

\$35.10

Quote Booking Setup

3 visits daily

Aged Care - Onboarding


Create a Quote Line (Booking Recurrence)

To set the Booking recurrence we select Booking Recurrence from the command bar on the Quote Booking Setup form.

We have options of Daily, Weekly and Yearly which will accommodate any pattern.

The start and end date should be populated based on the Quote Booking Setup.

This will calculate the number of bookings required for the quote and the agreement if converted to an agreement

 Booking Recurrence

Recurrence

Recurrence Pattern

Repeat

Weekly

Repeat every (#specified) week(s) on days selected below

1

Sunday

☐

Monday

☒

Tuesday

☐

Wednesday

☒

Thursday

☐

Friday

☒

Saturday

☐

Range of Recurrence

Start Date

1/01/2025

End Date Behavior

End by

End Date

31/12/2025

Custom Dates

Add Date

Dates

OK

CANCEL

Aged Care - Onboarding

Create a Quote Line

The Quote Booking Setup should be similar to below once completed.

←

↗

Save

Save & Close

Delete

Refresh

Check Access

Look Up Address

Flow

Send Report For Signa...

Linda Quote Home Care - Saved

Quote Line

GeneralQuote Booking SetupQuote Line SupplementsRelated

+ New Quote Booking S...

↺

<input type="checkbox"/>	Name ↑	Description	Time Window Start	Time Window End	Estimated Cost	Es
<input type="checkbox"/>	3 visits daily	Home Care service delivered 3 times a week for 2 h...	1/01/2025	31/12/2025	\$14,130.00	

Aged Care - Onboarding

Create Quote Supplements

Quote Booking Supplements can be added if required.
If Other is selected bottom right provide a Supplement name to identify and for statement use.

Linda Quote Home Care - Saved

Quote Line

GeneralQuote Booking SetupQuote Line SupplementsRelated

+ New SupplementsAdd Existing Supplem...

<input type="checkbox"/>	Supplements T...	Supplement Na...	Supplement Start ...	Supplement End ...	Supplements Quote ...	Supplements Agree...	Supplements Daily ...	Annual Supplements Daily...
<input type="checkbox"/>	Dementia and...	Dementia and Cog...	1/01/2025	31/12/2025	Linda Quote Home Care		\$1.25	\$456.25

Dementia and Cognition - Saved

Supplements

GeneralRelated

Supplements Type *Dementia and Cognition

Supplements Quote LineLinda Quote Home Care

Supplements Agreement---

Supplements Daily Fee *\$1.25

Supplement Start Date1/01/2025

Supplement End Date31/12/2025

Annual Supplements Daily Fee\$456.25

Supplements

GeneralRelated

Supplements Type *Other

Supplements Quote LineLinda Quote Home Care

Supplement Name

Aged Care - Onboarding

Activate Quote

To activate the quote select “Activate Quote” from the command bar.

←

↗

Save

Save & Close

+ New

Delete

Refresh

Check Access

Export to PDF

Look Up Address

Activate Quote

Process

Assign

Share

Linda requires HCP quote - Saved

Quote

SummaryQuote LinesRelated

Antony ClarkeOwner

\$14,930.70Total Amount w/ Travel Items

31/12/2024Effective From

21/01/2025Effective To

Pricing Details

Total Amount w/ Travel Items\$14,930.70

Last updated:31/12/2024 3:20 PM

Agreement-Based Lines

+ Add New Quote LineRefreshFlow

	Write-In ...	Agreem...	Service ...	Service ...	Start ...	End Date	Duration	Currency	Services...	Taxable	Sales Ta...	Extended Amount w/ Travel (B...
<input type="checkbox"/>	Linda Quo...		Linda Wo...		1/01/2025	31/12/2025	365 days	Australian...	Demo List	No		\$0.00

Aged Care - Onboarding

Revise Quote

Once activated Quote is read only, we can revise. The revision ID will increase and return to Draft waiting to be Activated again.

Read-only This record's status: Active

←

↻

+ New

🗑 Delete

🔄 Refresh

🔍 Check Access

📄 Export to PDF

📄 Create Order

📄 Revise

📄 Close Quote

📄 Process

👤 Assign

🔗 Flow

Linda requires HCP quote - Saved

Quote

Summary Quote Lines Related

AC Antony Clarke Owner \$14,930.70 Total Amount w/ Travel Iter

←

↻

💾 Save

💾 Save & Close

+ New

🗑 Delete

🔄 Refresh

🔍 Check Access

📄 Export to PDF

🔍 Look Up Address

📄 Activate Quote

📄 Process

👤 As

Linda requires HCP quote - Saved

Quote

Summary Quote Lines Related

AC Antony Clarke Owner \$0.00 Total Amount w/ Travel Items

Currency * Australian Dollar

Quote ID * QUO-0001027

Revision ID * 1

Status * Draft

Aged Care - Onboarding

Create Order

After activating the quote, an order needs to be created for the agreement. Clicking the "Create Order" button will generate the order.

Read-only This record's status: Active

←

↻

+ New

🗑 Delete

🔄 Refresh

🔍 Check Access

📄 Export to PDF

📄 Create Order

📄 Revise

📄 Close Quote

📄 Process

👤 Assign

🔗 Flow

⋮

Linda requires HCP quote revised - Saved

Quote

Summary

Quote Lines

Related

AC

Antony Clarke

Owner

\$14,930.70

Total Amount w/ Travel Items

3

E

Create Order

Use this quote to create an order.

Status Reason

*

Won

▼

Date Won

*

31/12/2024

📅

Description

Participant has committed to HCP

Close Opportunity

*

Yes

▼

Calculate actual revenue from quotes

*

Yes

▼

OK

Cancel

Aged Care - Onboarding

Create Order

After activating the quote, an order needs to be created for the agreement. Clicking the "Create Order" button will generate the order.

Read-only This record's status: Active

←

↻

+ New

🗑 Delete

🔄 Refresh

🔍 Check Access

📄 Export to PDF

📄 Create Order

📄 Revise

📄 Close Quote

📄 Process

👤 Assign

🔗 Flow

⋮

Linda requires HCP quote revised - Saved

Quote

Summary

Quote Lines

Related

AC

Antony Clarke

Owner

\$14,930.70

Total Amount w/ Travel Items

3

E

Create Order

Use this quote to create an order.

Status Reason

*

Won

▼

Date Won

*

31/12/2024

📅

Description

Participant has committed to HCP

Close Opportunity

*

Yes

▼

Calculate actual revenue from quotes

*

Yes

▼

OK

Cancel

Aged Care - Onboarding

Create Order

After creating the order and Agreement will be created visible from “Order Lines”.

Agreements can also be accessed from the Participant record.

←

↶

Save

Save & Close

+ New

Delete

Refresh

Check Access

Create Invoice

Process

⌵

Fulfill Order

Cancel Order

Recalculate

⋮

Linda requires HCP quote revised - Saved

Order · Field Service Information ⌵

Summary **Order Lines** Related ⌵

Service-based Lines

+ Add New Order Line

Refresh

<input type="checkbox"/>	Write-In Product ⌵ ⌶	Agreement ⌵	Service Account ⌵	Service Territor... ⌵	Start Date (Agr... ⌵	End Date (Agre... ⌵	Duration (Agre... ⌵	Taxable (Agree... ⌵	Sales Tax Co
<input type="checkbox"/>	Linda Quote Home C...	00037	Linda Worth		1/01/2025	31/12/2025	365 days	No	

LW

Linda Worth - Saved

Account · Participant - NHS ⌵

Alerts

Summary

Historic data

Health Profile

Details

Progress Notes

Assessments

Disabilities

Goals

Quotes

Agreements

Supports

Incidents

Risk Assessments

Agreements

+ New Service Agreement

Refresh

<input type="checkbox"/>	Agreement Number ⌵ ⌶	Service Account ⌵	Billing Account ⌵	System Status ⌵	Service Name ⌵	Start Date ⌵	End Date ⌵	Funding Manage...
<input type="checkbox"/>	00037	Linda Worth	Linda Worth	Active	HCP	1/01/2025	31/12/2025	HCP Managed

Aged Care - Agreement

Initial Agreement

The agreement is populated with the details from the quote as the next few slides will illustrate.

00037 - Saved
Service Agreement

00037
Agreement Number

Linda Worth
Client Participant

AC
Antony Clarke
Owner

Agreement Business Pro...
Active for 43 minutes

Agreement (43 Min)

Agreement Booking Setup

Agreement Setup Finished

General

Agreement Supplements

Monthly Actuals

Notes

Related

GENERAL

Agreement Number00037

Client ParticipantLinda W...

Billing AccountLinda W...

Price ListDemo List

Agreement DescriptionLinda Quote Home...

DescriptionHome care 3 days a week

Start Date1/01/2025

End Date31/12/2025

Duration365 days

Government Contribution

Funding LevelLevel 1 - Basic ca...

Package Level Contribution Daily\$29.01

Annual Package Level Contribution\$10,588.65

Income Assessment Fee Daily\$3.25

Annual Income Assessment Fee\$1,186.25

Adjusted Government Fee\$25.76

Annual Adjusted Government Fee\$9,402.40

Participant Contribution

Participant Contribution\$0.00

Annual Participant Contribution

Basic Daily Fee\$0.00

Annual Basic Daily Fee

Other Contribution\$0.00

Annual Other Contribution

Aged Care - Agreement

Initial Agreement

The agreement is populated with the details from the quote as the next few slides will illustrate.

Provider Charges

Care Management Fee %	<input type="text" value="15"/>	Package Management Fee %	<input type="text" value="15"/>
Care Management Fee Daily	<input type="text" value="\$4.35"/>	Package Management Fee Daily	<input type="text" value="\$4.35"/>
Annual Care Management Fee	<input type="text" value="\$1,588.30"/>	Annual Package Management Fee	<input type="text" value="\$1,588.30"/>

HCP


HCP Opening Balance	<input type="text" value="---"/>	Total Contributions	<input type="text"/>
HCP Balance	<input type="text"/>	Total Costs	<input type="text"/>
HCP Send Statement	<input type="text" value="No"/>		

Aged Care - Agreement

Agreement Supplements

The agreement is populated with the details from the quote as the next few slides will illustrate.

00037 - Saved
Service Agreement

00037 Agreement Number | Linda Worth Client Participant |  Antony Clarke Owner

Agreement Business Pro...
Active for 48 minutes

Agreement (48 Min)

Agreement Booking Setup

Agreement Setup Finished

General


Agreement Supplements

Monthly Actuals

Notes

Related

+ New Supplements

 Add Existing Supplem...

<input type="checkbox"/>	Supplements T...	Supplement Na...	Supplement Start ...	Supplement End ...	Supplements Quote ...	Supplements Agree...	Supplements Daily ...	Annual Supplements Daily...	C
<input type="checkbox"/>	Dementia and...	Dementia and Cog...	1/01/2025	31/12/2025		00037	\$1.25	\$456.25	3

Aged Care - Agreement

Agreement Bookings

Under Booking Setups we can see the Bookings created that will generate Work Orders to be completed by resources based on the recurrence schedule we created.

- Once a booking date has a work order created it will show as processed
- Any change to recurrence schedule will only update active bookings in the future

3 visits daily - Saved

Agreement Booking Setup

Agreement Booking Setup - NHS

General

Booking Dates

Related

<input type="checkbox"/>	Agreement	Booking Setup	Booking Date	Status	Resource	Work Order
<input type="checkbox"/>	00037	3 visits daily	1/01/2025 10:00 AM	Processed	Vipul Vishwas	00051
<input type="checkbox"/>	00037	3 visits daily	3/01/2025 10:00 AM	Processed	Vipul Vishwas	00050
<input type="checkbox"/>	00037	3 visits daily	6/01/2025 10:00 AM	Processed	Vipul Vishwas	00052
<input type="checkbox"/>	00037	3 visits daily	8/01/2025 10:00 AM	Processed	Vipul Vishwas	00053
<input type="checkbox"/>	00037	3 visits daily	10/01/2025 10:00 A...	Active	Vipul Vishwas	
<input type="checkbox"/>	00037	3 visits daily	13/01/2025 10:00 A...	Active	Vipul Vishwas	
<input type="checkbox"/>	00037	3 visits daily	15/01/2025 10:00 A...	Active	Vipul Vishwas	

Aged Care - Bookings

Schedule Board

The schedule board allows operations to view, schedule and cancel bookings.

Unscheduled or canceled bookings will show in the Open Requirements view.

Multiple schedule boards can be enabled based on regions etc and resources assigned to the board.

Initial public view

Filters

Hourly

Gantt

Today

2/01/2025 - 8/01/2025

Book

Search resources

Vipul Vishwas
(27h booked) 13%

Resources/s

Thursday - 2/01/2025

10:00 AM

11:00 AM

12:00 PM

1:00 PM

2:00 PM

BO-00001036
Work Order
1h

Show or hide map

2/01/2025

Map View: Location of booking

00051

1 - 1 of 1

Open Requirements

Unscheduled Work Orders

These views show work orders not booked or partially booked. They can be dragged to the resource on the board or use Find Availability to have the URS find a resource

Name	From Date	To Date	Duration	Proposed Duration	Fulfilled Duration	Remaining Duration	Priority	Territory	Time From Promised	Time To Promised	Status	Created On
00051	1/01/2025	2/01/2025	2 hrs	0 mins	0 mins	2 hrs					Active	31/12/2024 4:44 PM
00037	1/01/2025	2/01/2025	2 hrs	0 mins	0 mins	2 hrs					Active	27/12/2024 11:04 PM

Aged Care - Bookings

Assigning Work Oder

The schedule board allows operations to view, schedule and cancel bookings.

Unscheduled or canceled bookings will show in the Open Requirements view.

Multiple schedule boards can be enabled based on regionsetc and resources assigned to the board.

Initial public view

Filters

Hourly

Gantt

Today

2/01/2025 - 8/01/2025

Book

Search resources

Vipul Vishwas
(27h booked) 13%

Resources/s

Thursday - 2/01/2025

10:00 AM

11:00 AM

12:00 PM

1:00 PM

2:00 PM

BO-00001036
Work Order
1h

Show or hide map

2/01/2025

Map View: Location of booking

00051

1 - 1 of 1

Open Requirements

Unscheduled Work Orders

These views show work orders not booked or partially booked. They can be dragged to the resource on the board or use Find Availability to have the URS find a resource

Name	From Date	To Date	Duration	Proposed Duration	Fulfilled Duration	Remaining Duration	Priority	Territory	Time From Promised	Time To Promised	Status	Created On
00051	1/01/2025	2/01/2025	2 hrs	0 mins	0 mins	2 hrs					Active	31/12/2024 4:44 PM
00037	1/01/2025	2/01/2025	2 hrs	0 mins	0 mins	2 hrs					Active	27/12/2024 11:04 PM

The agreement is created with all the data present in the quote line through the agreement-triggered flow.

00033 - Saved
Service Agreement

00033 Agreement NumberWarren Cree Client Participant

Agreement Business Pro...
Active for 8 minutes

Agreement (8 Min)

Agreement Booking Setup

Agreement Setup Finished

General

Agreement Supplements

Monthly Actuals

Notes

Related

GENERAL

Agreement Number00033

Client ParticipantWarren Cree

Billing AccountWarren Cree

Price ListDemo List

Agreement DescriptionHCP Quote Line

Description---

Start Date10/1/2024

End Date9/30/2025

Duration365 days

Cost CentreDemo Cost 1

CompanyCompany-1

OwnerVipul Vishwas (Offline)

Government Contribution

Funding LevelLevel 1 - Basic care needs - \$1...

Package Level Contribution Daily\$29.01Annual Package Level Contribution\$10,588.65

Income Assessment Fee Daily\$10.00Annual Income Assessment Fee\$3,650.00

Adjusted Government Fee\$19.01Annual Adjusted Government Fee\$6,938.65

Participant Contribution

Participant Contribution\$8.00Annual Participant Contribution\$2,920.00

Basic Daily Fee\$8.00Annual Basic Daily Fee\$2,920.00

Other Contribution\$4.00Annual Other Contribution\$1,460.00

Provider Charges

Care Management Fee %10Package Management Fee %15

Care Management Fee Daily\$2.90Package Management Fee Daily\$4.35

Agreement Booking Setup

Agreement Setup Finished

Participant Contribution

Participant Contribution	\$8.00	Annual Participant Contribution	\$2,920.00
Basic Daily Fee	\$8.00	Annual Basic Daily Fee	\$2,920.00
Other Contribution	\$4.00	Annual Other Contribution	\$1,460.00

Provider Charges

Care Management Fee %	10	Package Management Fee %	15
Care Management Fee Daily	\$2.90	Package Management Fee Daily	\$4.35
Annual Care Management Fee	\$1,058.87	Annual Package Management Fee	\$1,588.30

HCP

Manually added HCP Opening Balance		Calculate daily Total Costs, Total Contributions, HCP Balance through nightly flow and updated here.	
HCP Opening Balance	\$100.00	Total Contributions	
HCP Balance		Total Costs	
HCP Send Statement	No		

Next, in the agreement, go to the booking setup. Here, you can either create a new booking setup, or if a booking was created in the quote line, it will automatically populate with the services and products in the agreement. Then, add the booking recurrence.

00033 - Saved
Service Agreement

Agreement Business Pro...
Active for 11 minutes

Agreement (11 Min)

Agreement Booking Setup

General

Agreement Supplements

Monthly Actuals

Notes

Booking Setups

Related

Show Chart

New Agreement Booki...

Refresh

Flow

Run Report

Excel Templates

Export Agreement Bo...

Agreement Booking Setup Associated View

Name

Description

Booking Setup

Agreement Booking Dates

Then, based on the agreement booking date, we can convert it to a work order.

Agreement Booking Dates							+ New
<input type="checkbox"/>	Agreement ▾	Booking Setup ▾	Booking Date ↑ ▾	Status ▾	Resource ▾	Work Order ▾	
<input type="checkbox"/>	00033	Booking Setup	1/1/2025 11:00 AM	Processed	Vipul Vishwas	00037	
<input type="checkbox"/>	00033	Booking Setup	1/8/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	1/15/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	1/22/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	1/29/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	2/5/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	2/12/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	2/19/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	2/26/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	3/5/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	3/12/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	3/19/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	3/26/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	4/2/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	4/9/2025 11:00 AM	Active	Vipul Vishwas		
<input type="checkbox"/>	00033	Booking Setup	4/16/2025 11:00 AM	Active	Vipul Vishwas		

Create Work Order

Next, click the "Generate Work Order" button in the Agreement Booking Date to generate the work order.

←

📄

📁

💾 Save

💾 Save & Close

+ New

🚫 Deactivate

🗑 Delete

🔄 Refresh

🔍 Check Access

📄 Generate Work Order

📄 Add to Queue

📄 Queue Item Details

👤 Assign

🔗 Flow

⌵

📧 Send

00033 - Saved

Agreement Booking Date

General

Notes

Related

⌵










Resource	<div>Vipul Vishwas</div>	Agreement	<div>00033</div>
Status	<div>* Active</div>	Booking Date	<div>* 1/8/2025</div>
Earliest Date & Time	<div>1/8/2025 11:00 AM</div>	Latest Date & Time	<div>1/8/2025</div>
Booking Setup	<div>* Booking_Setup</div>	Owner	<div>* Vipul Vishwas (Offline)</div>
Work Order	<div>🔒</div>	Estimated Duration	<div>---</div>

Agreement Booking Dates

After generating the work order, set the lookup to the work order field.


00033 - Saved
Agreement Booking Date

General Notes Related ▾

Resource	 Vipul Vishwas ×	Agreement	*  00033 ×
Status	* Processed ▾	Booking Date	* 1/1/2025  11:00 AM
Earliest Date & Time	--- 	Latest Date & Time	--- 
Booking Setup	*  Booking_Setup ×	Owner	*  Vipul Vishwas (Offline) ×
Work Order	  00037	Estimated Duration	---

00037 - Saved
Work Order · Work Order - Main ▾


Work Order Business Pro...
Active for 18 minutes




Work Order (18 Min)



Schedule Work Order



- General
- Resource Requirements
- Products and Services
- Geolocation
- Settings
- Record Log
- Related ▾



GENERAL

Work Order Number *  00037

Client Participant *  [Warren Cree](#) × 

SIL group participants --- 


Time From Promised  --- 

Time To Promised  --- 

Instructions ---

Service Name HCP ▾


NDIS Booking Type --- ▾



Sleepover review required?  No

GENERAL

Timeline

+     

 Search timeline

 Enter a note... 

Get started

Capture and manage all records in your timeline.

Product --- 

KM Qty ---

KM Price ---

Duration ---

Status

System Status

Is Public Holiday Prod Update Required?

Public Holiday Product Updated?

Invoice

Invoice Created ?

Related Bookings

☐ Name ▾

☐ BO-0000.

Pro...<

Agreement (3 D)

Agreement Booking Setup

Agreement Setup Finis

ent Supplements

Monthly Actuals

Notes

Related

Note: In the agreement, monthly actual records will be created on a monthly basis through the scheduled flow.

+ New Monthly Actual F...

✍ Add Existing

	Date	Monthly Participant	Monthly Agreement	Item Type	Amount
	11/1/2024	Michelle Grey	00032	Income Assessme...	\$630.00
	11/1/2024	Michelle Grey	00032	Government Cont...	\$1,530.60
	11/1/2024	Michelle Grey	00032	Package Manage...	\$229.59
	11/1/2024	Michelle Grey	00032	Supplement Total	\$150.00
	11/1/2024	Michelle Grey	00032	Basic Daily Fee	\$300.00
	11/1/2024	Michelle Grey	00032	Participant Contri...	\$420.00
	11/1/2024	Michelle Grey	00032	Other Contribution	\$120.00
	11/1/2024	Michelle Grey	00032	Care Managemen...	\$153.06
	11/1/2024	Michelle Grey	00032	Work Order Servic...	\$0.00
	11/1/2024	Michelle Grey	00032	Work Order Prod...	\$0.00

Questions and answers

- ▶ What are your questions?
- ▶ What are your concerns?
- ▶ What was not mentioned during this presentation?

For further information, contact:



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