

Chronic care recall tracker

See when each patient’s plan can be reviewed (967) or re-prepared (965), when allied health and nurse access lapses, and which old plans must move before 1 July 2027.

The date rules

1. **New plan (965): 12 months.** Unless exceptional circumstances apply, a plan can be prepared no more than once every 12 months.

2. **New plan (965): 3 months after a review.** Unless exceptional circumstances apply, a new plan must be at least 3 months after the last review.

3. **Review (967): 3 months.** Unless exceptional circumstances apply, a plan can be reviewed no more than once every 3 months. The earliest review is month 3 from the day the plan is prepared.

4. **Clinically relevant.** Each service must also be clinically relevant. Which patients need a plan, and when to review or re-plan, stays a clinical decision for the GP.

5. **Exceptional circumstances.** A significant change in the patient’s clinical condition or care circumstances that makes the service necessary sooner. For an early service, record the particulars in the patient’s notes and mark the invoice, voucher or digital claim. The GP decides.

6. **18 months: access, not expiry.** Plans do not expire. For allied health, Aboriginal and Torres Strait Islander health and wellbeing services and practice nurse services, the plan must have been prepared or reviewed in the previous 18 months.

7. **Old plans until 30 June 2027.** A GP management plan or team care arrangement made before 1 July 2025 supports allied health, Aboriginal and Torres Strait Islander health and wellbeing, and practice nurse services consistent with it until the end of 30 June 2027. From 1 July 2027 those services need a GPCCMP.
8. **Old plans cannot be reviewed with 967.** The GP prepares a new plan with 965 instead.

9. **Which old plan counts.** Individual allied health and Aboriginal and Torres Strait Islander health services need both a GPMP and TCA. Type 2 diabetes group services need a GPMP alone. 10997 face to face accepts either; 93201 and 93203 (video and phone) ask for both.

10. **5 practice nurse services a year.** Up to 5 per calendar year, in total across 10997, 93201 and 93203. The count resets on 1 January; unused services do not carry over.

11. **Nurse eligibility.** A GPCCMP prepared or reviewed in the last 18 months, a multidisciplinary care plan, or, until the end of 30 June 2027, a GPMP or TCA made before 1 July 2025. Services remaining does not by itself mean the patient is eligible.

12. **Who can bill 965 and 967.** Registered in MyMedicare: only the practice they are registered with. Not registered: the patient’s usual GP, or another GP at the same practice.

13. **Allied health referral letter.** Valid for the period stated in it or, if none is stated, 18 months, counted from the first service under the referral. Referrals issued before 1 July 2025 remain valid until their services are used.

Status meanings

- Access lapsed: review or new plan needed**
More than 18 months since the last 965 or 967 (or after 30 June 2027 for an old plan).
- Access lapses within 60 days**
The 18-month date (or 30 June 2027 for an old plan) is within 60 days. The 60 days is a tracker setting, not an MBS rule.
- Old plan: move before 1 July 2027**
An old GPMP or TCA with no 965 or 967 recorded.
- Review window open**
At least 3 months since the last 965 or 967, so a 967 review can be billed if clinically relevant.
- OK**
None of the above today.
- Enter plan dates**
No 965, 967 or old plan recorded.

Use a patient ID or initials, never names.

Keep completed sheets inside the practice’s own systems.



Patients

Use a patient ID or initials, never names. Fill the white columns from the record; work out the shaded columns by hand using the hint under each heading, then the rules on page 1.

Patient ref	Usual GP	MyMedicare Y/N	Last 965	Last 967	Old plan Y/N + date	Nurse services used	Next review from	New plan from	Access valid until	Status / action
ID or initials, never names		Registered with this practice	Plan prepared	Plan reviewed	GPMP or TCA made before 1 July 2025	This calendar year, of 5	Later of last 965 or 967 + 3 months	Later of 965 + 12 months and 967 + 3 months	Later of last 965 or 967 + 18 months; old plan only: 30 June 2027	See status meanings on page 1