Create a New Patient Account

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Note:

- An Account Type will only display if there is an enabled guarantor relevant for that account type.
- This is process is usually managed by an Advanced User.
- If the list of accounts for a patient doesn't already have an entry suitable for services about to be invoiced, it will be necessary to add another account. You should not edit an existing account to change it to suit the current requirement, as this will alter the account audit.

1. From the patient record
2. Select **Accounts** from the menu
    a. The Patient Accounts screen will display
3. Select the **New Account** button
4. Select the type of patient account to create:
    - A patient can have different accounts for different health funds and Medical Providers.

      Different types of patient account that can be created in CareRight include,

        1. **Private Account:** The patient (or parent/guardian) is responsible for the payment of the services. This also includes the following scenarios where the patient pays the outstanding amount and a claim processed via CareRight
            - The patient pays out of pocket only - Rebate is paid via cheque, addressed to the Doctor
            - The patient pays In full - rebate is paid electronically into the patient's account
        2. **Workers compensation:** Services rendered are a result of a workers compensation claim through the specified agency.
        3. **Legal**: The services have been requested by a legal 3rd party.
        4. **Medicare:** The services will be bulk-billed and Medicare will pay directly.
        5. **DVA:** The patient is a DVA Health Cardholder and DVA will pay for the services.
        6. **Health Fund:** The patient is a member of the specified health fund and the billed eligible services will be paid by the fund.
        7. **Hearing Services:** The services provided for HSP (Hearing Services Program) eligible patients.
5. Fill in the fields relevant to the Type of Account

Private Account	
Field	**Description**

Details	• **Location** - Location of the account • **Rates** - (Private Accounts only) Private patients can have different private account types. This needs to be configured by the System Administrator. Please refer to Private Account Types in System Admin Guide. • **Override Rate For This Account** • **Account Provider** - Account provider whom we are billing against • **Account Flag** - Patient account flag, Please refer to Account flags for more information. • **All services are taxable supplies** - If checked will automatically add GST to all items invoiced on this account
Claimant	This is only required if claiming against a different person for this patient account. Eg: Claiming for newborns as a parent as the claimant.
Notes	Notes applicable to all invoices created under this patient account
Workers Compensation	
Details	• **Location** - Location of the account • **Guarantor** - The entity responsible for the payment of the account • **Account Provider** - Account provider whom we are billing against • **Account Flag** - Patient account flag, Please refer to Account flags for more information.
Employer Details	• **Employer** - Name of the Employer • **Date** - The date the incident the claim relates to • **Claim Number** - Reference number for the claim • **Notes** - Any relevant notes
Guarantor Details	• **Bank** - The bank that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **Branch** - The branch that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **P Acc Surgery** - The date of the aftercare period for the most recent procedural item ends. Some procedural items have an included aftercare period and this field is used to track when that expires and warn you if you try to raise an invoice in that period that should be covered as part of that aftercare. • **Branch**
Notes	Notes applicable to all invoices created under this patient account
Legal	

Details	• **Location** - Location of the account • **Guarantor** - The entity responsible for the payment of the account • **Account Provider** - Account provider whom we are billing against • **Account Flag** - Patient account flag, Please refer to Account flags for more information.
Employer Details	• **Employer** - Name of the Employer • **Date** - The date the incident the claim relates to • **Claim Number** - Reference number for the claim • **Notes** - Any relevant notes
Guarantor Details	• **Bank** - The bank that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **Branch** - The branch that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **P Acc Surgery** - The date of the aftercare period for the most recent procedural item ends. Some procedural items have an included aftercare period and this field is used to track when that expires and warn you if you try to raise an invoice in that period that should be covered as part of that aftercare.
Notes	Notes applicable to all invoices created under this patient account
Medicare	
Details	• **Location** - Location of the account • **Guarantor** - This field will default to Medicare • **Account Provider** - Account provider whom we are billing against • **Account Flag** - Patient account flag, Please refer to Account flags for more information.
Notes	Notes applicable to all invoices created under this patient account
DVA	
Details	• **Location** - Location of the account • **Guarantor** - This field will default to DVA • **Account Provider** - Account provider whom we are billing against • **Account Flag** - Patient account flag, Please refer to Account flags for more information.
Notes	Notes applicable to all invoices created under this patient account
Health Fund	
Details	• **Location** - Location of the account • **Guarantor** - The entity responsible for the payment of the account • **Minimum Benefit** (check box) • **Account Flag** - Patient account flag, Please refer to Account flags for more information.

Guarantor Details	• **Bank** - The bank that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **Branch** - The branch that issues cheques used by the guarantor to make payments. Increasingly redundant as more payments are made by direct deposit. • **P Acc Surgery** - The date of the aftercare period for the most recent procedural item ends. Some procedural items have an included aftercare period and this field is used to track when that expires and warn you if you try to raise an invoice in that period that should be covered as part of that aftercare.
Notes	Notes applicable to all invoices created under this patient account

6. Select **Create Account** button.