

Cases

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About Cases

Cases are used to track the delivery of care over a time period as related to a specific patient goal. This may relate to tracking services delivered for billing, tracking services for statutory reporting (non-admission) or claiming (e.g. DVA or NDIS).

Initial Setup

Prior to using this module, your System Administrator must complete a few steps:

1. Create the required Case Categories for your organisation.
2. Issue permissions in CareRight for users together edit or view cases see [Permissions and what it enables](#) for more information.

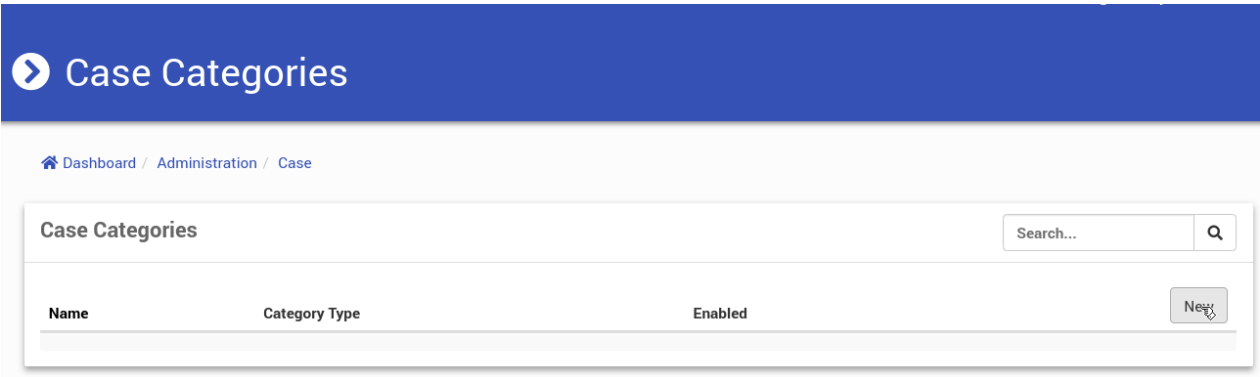
Your System Administrator will have access to add or modify your permissions for Cases.

Assigning Entitlement Category to Case Category

To assign an Entitlement to Cases, please make sure the following requirements should be configured. It is required to have account permissions to access admin settings.

- Entitlement Category (Admin > Entitlement Category)
- Case Category (Admin > Case)

From Case Category, select an existing Entitlement Category



Case Categories

Dashboard / Administration / Case

Search...

New

Name	Category Type	Enabled
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Existing Entitlement Categories can be selected from Case Categories

Case Category

Name *

Testing Case Category

Category Type

Generic

☐ Enabled

Checklist

Select from list

Case Worker Assignment

Directly to Case

Associated Assessment Name

Select from list

☐ Expect Daily Events

Entitlement Category

Select from list

Mental Health

Testing Health

Create Case Category

Cancel

A Case Category can have at least one Entitlement Category.

Assigning Cases to Patients

After the the configuration of Case and Entitlement Categories, An entitlement can be created or assigned to a patient automatically. This automation process checks for the existing Entitlements of a patient.

Upon creation of a patient-case, the system works as follows:

- An automated checking of patient entitlements. If there are available/assigned Entitlement to a patient, the system will display a drop-down field of entitlement list.
- If no Entitlement chosen upon creation of a new Case, the system will create a new Entitlement to the patient. (The new Entitlement will be based from the Entitlement Category defaults assigned from Case Category).
- The system will check and will not display any expired or archived Patient Entitlements.
- This will only work if there are only assigned Entitlement Category on Case Category. (See above for configuration)

Entitlements are available for this Case Category. If no entitlement is selected, a new entitlement will be automatically created for the patient.

New Case

Case Category

Test Case Category

Location *

Adelaide Clinic

Reference

Case Worker

Select a provider

Entitlement

Select from list

Testing Health, Start Date: 2024-07-05

Testing Health, Start Date: 2024-07-05

Testing Health, Start Date: 2024-07-05

Testing Health, Start Date: 2024-07-05

Testing Health, Start Date: 2024-07-05

Testing Health, Start Date: 2024-07-05, Automated Case-Based Generation

Testing Health, Start Date: 2024-07-05, Generated from Case Creation

Testing Health, Start Date: 2024-07-05, Generated from Case Creation

Start

Open

Cancel

Sample display of a selected Case Category with assigned Entitlement Category (Patient-Case)

Case Panel

To view all cases:

Select **Dashboard** in the Main Menu.

Click **Cases & Programs**.

Click on **All Cases**.

Cases						
Case Category	Status	Number of Cases	Steps Done	Missing Case Workers	Missing Events	
Cardiology	Open	7		3		Show
Cardiology	Open	1	3/3	3		Show
Cardiology	Open	1	0/3	3		Show
Cardiology	Open	1	0/4	3		Show
Daily Monitoring	Open	4		8	8	Show
Daily Monitoring	Open	1	1/3	8	8	Show

Missing Case Workers Column (New v6.70 Feature)

The Missing Case Worker column displays the number of cases for each category that do not currently have a case worker assigned. For case categories that use mass assignment, CareRight will check the mass assignment and report as "unassigned" cases in locations that have no assigned provider. For case categories not configured for mass assignment, CareRight will check the case worker association.

Missing Events Column (New v6.70 Feature)

The Missing Events column displays the number of cases with missing events (and **not** the number of actual missing events). For Admins: This column is displayed if the any of the case categories have the "Expect Daily Events" checkbox selected.

Steps Done

If the case has associated checklist, steps done column displays the number of checklist completion out of total.

General usage

Create a New Case

1. [Search](#) for a patient.
2. Click **Show** to load the patient.
3. In the menu, click **Cases & Programs**.
4. In the Cases screen, click **New**.
 - a. A blank case record will appear.
5. Specify Case Parameters
 - a. In the **Case Category** field, select a relevant case category.
 - b. In the **Location** field, select a location where the case is being presented.
 - c. In the **Reference** field, enter a description of the case.
 - d. In the **Case Worker** field, search for and select an appropriate provider.

e. Optionally, if a **Patient Entitlement** is associated with this case and available, you can select one at this point.

i. If a case category is configured with a patient entitlement and nothing is selected, a new entitlement will be started when the case is opened.

f. Enter **Start Date**

6. To open the new case, click **Open**.

Note: If the case category chosen is DVA Community Nursing and the service rendered is for a White Card holder and the service provided in accordance with the White Card Condition, then tick the box Accepted Disability Indicator.

The case will be given a case number and a start date, which is the current date. The date can be amended by clicking on **Show**. Likewise, if you have added associate **Checklist**, you can view by clicking on show.

The screenshot displays a web application interface for case management. At the top, there is a red header bar. Below it, a navigation bar contains buttons: 'Edit', 'Hold', 'Closed', and 'Cancelled'. A breadcrumb trail reads: 'Dashboard / Clients / Miss John Smith / Cases & Programs / Cardiology - 23'. A green success message states 'Case was successfully updated.' Below this, a blue box titled 'Admission checklists' shows three items: 'Identification verification' (checked), 'Guarantor verifications' (checked), and 'NOK notify and consent taken' (unchecked). The main content area is titled 'Cardiology - 23' and contains a table with case details.

Case Number	23
Case Category	Cardiology
Reference	
Case Worker	Dr Darlene HALL
Location	TTEST Location
Checklist	Admission checklists
Status	Open
Start	20/05/2024
End	

Editing a case

1. [Search](#) for a patient.
2. Click **Show** to load the patient.
3. In the menu, click **Cases**.
 - a. A list of cases appears.
4. Click **Show** for the case you wish to edit.
5. Click **Edit**.
6. Modify the **Reference**, **Case Worker** and/or **Start** date, case checklist (if any) as needed.

Edit
Hold
Closed
Cancelled

Dashboard / Clients / Miss Lady Smith / Cases & Programs / Aplha - 17

Aplha - 17

Case Number	17
Case Category	Aplha
Reference	
Case Worker	Dr Darlene HALL
Location	ADL
Status	Open
Start	14/05/2023
End	

Edit
Hold
Closed
Cancelled

Dashboard / Clients / Miss Lady Smith / Cases & Programs / Case Test 1 - 15

Case checklist example

✓ One

✗ Two

✓ Three!

Case Test 1 - 15

Case Number	15
Case Category	Case Test 1
Reference	
Case Worker	Dr Darlene HALL
Location	ADL
Checklist	Case checklist example
Status	Open
Start	14/05/2024
End	

7. In the DVA Community Nursing panel, select the checkbox to indicate an **Accepted Disability Indicator**.
 - a. In the **Accepted Disability Text** field, enter information relevant to the accepted disability.
8. Click **Update Case**.

Since we have received plenty requests about deleting the cases. So we tweaked the system that Clintel admins have access to the Cancelled button; and no longer needs a dev to do this. (This function is available from 6.78)

1. Go to **Dashboard**
2. Search for a patient and click show
3. Click **case & programs** on the left side panel

CareRight cr.test

Dashboard

Patients

000135: Mr Caleb James Gray

Accounts

Admissions

Alerts and Allergies

Appointments

Assessments

Cancer Notifications

Cases & Programs

Clinical Notes

Correspondence

Diagnosis & History

Documents

Mr Caleb James Gray

MRN: 000135 CRN: XXX1234 ERN: Primary Provider: Dr William Bill Home: Male, aged 45 years, born on July 27, 1976, last admitted to Clintel Clinic

aa 48218 2 Peanut Peanut ICONPAY

Dashboard / Patients / 000135: Mr Caleb James Gray

Cases

Start	End	Status	Case Number	Ref
01/10/2021		Hold	75	
14/09/2021	14/09/2021	Closed	74	Tes
03/05/2021		Hold	68	

Programs

Program

4. Click **show** on the case box

Cases								
Start	End	Status	Case Number	Reference	Location	Case Category	Case Worker	New
01/10/2021		Hold	75		Head Office in Melbourne	Test Case		Show
14/09/2021	14/09/2021	Closed	74	Test1	Clintel Clinic	Test Case		Show
03/05/2021		Hold	68		Clintel Clinic	Test Case		Show

5. Click **cancelled** to delete this case (you need permissions to do that)

CareRight cr.test

Dashboard

Patients

000135: Mr Caleb James Gray

Cases & Programs

Test Case - 75

Mr Caleb James Gray

MRN: 000135 CRN: XXX1234 ERN: Primary Provider: Dr William Bill Home: 224 Curdievale-Pt Campbell Rd, ST PETERS SA 5069

aa 48218 2 Peanut Peanut ICONPAY

Edit Re Open Cancelled

Dashboard / Patients / 000135: Mr Caleb James Gray / Cases & Programs / Test Case - 75

Test Case - 75

Case Number: 75

Case Category: Test Case

Reference:

Case Worker:

Location: Head Office

Room:

Status: Hold

Start: 01/10/2021

End:

How to search cases

To search for cases, from the All Cases screen, click **Change Search Criteria**.

All Cases

Change Search Criteria

Bulk Assign Cases to Others

Dashboard / Cases & Progs

The Search Options panel appears.

Search Options

Case Category

Case Number

Reference

Location

Case Worker

Status ☐ Prepare ☐ Open ☐ Hold

☒ Include Cases Expecting Events

Start

End

Search

The Search Options panel offers a variety of criteria, such as Case Category, Case Number, Location, Status, and so on. All, some, or none of these can be selected to display case content.

The Case Status field includes the following options:

Case status
Prepare: This is a like a draft status for a case and allows for a case record to be created prior to actually opening the case. A case in a prepare status is not considered open. From a prepare status the status can be changed to either open or cancelled.
Open: This is a main state for a case and indicates that case is active and services are being delivered to the patient. From an open status the status can be changed to closed.
Closed: This state generally represents a case when services are no-longer being provided to the patient. From a closed status the status can be changed to open.
Cancelled: This state is used to represent a case that has not been opened and will never be opened. A case in cancelled state can not have its state changed.
Hold
Closed - Outcome Achieved
Closed - Outcome Not Achieved

When done, click **Search**.

Dashboard / Clients / Miss John Smith

Cases									New	
Start	End	Status	Case Number	Reference	Location	Case Category	Steps Done	Case Worker		
20/05/2024		Open	23		Location Testii	Cardiology	2/3	Dr Darlene HALL	Show	
20/05/2024		Open	24		Location Testii	Example	0/3	Dr Darlene HALL	Show	
20/05/2024		Open	25		Location Testii	Cardiology	0/3		Show	

This article includes the following topics:

Topics
What is My Cases & Programs?
Interface
My Cases Panel
Today's Progs
My Programs

What is My Cases & Programs?

This screens displays all cases and programs assigned directly to the current user.

Interface

My Cases & Progs

[Dashboard](#) / [Cases & Progs](#)

My Cases

[Change Case Assignment](#)

- Banksia Park Clinic: alcohol, anxiety
- Clintel Clinic: Test Case - Vikki

Clintel Clinic - a

File №	Patient	DOB	Case	Case Category
0000000969	Sir Rufus O'Hare Bastian	15/06/2012	52	Test Case

[Form](#)

Today's Progs

Prog	Prog Schedule Dates	Description	Enrolment Count
Anger Management Support	01/11/2020 - 30/11/2020	Focus on Post Traumatic Stress Disorder and how to deal with related anger issues.	5 of 5

[Attendance](#)

My Progs

Prog	Prog Schedule Dates	Description	Enrolment Count	Next Session Date
Anger Management Support	04/11/2020 - 25/11/2020	Meeting to discuss anger issues, to support sharing of experiences, and offer a sounding board for attendees in a judgement-free environment.	3 of 10	09/11/2020

[Manage](#)

[Edit](#)

My Cases Panel

Displays a list of cases assigned to the current user.

My Cases

[Change Case Assignment](#)

- Banksia Park Clinic: alcohol, anxiety
- Clintel Clinic: Test Case - Vikki

Clintel Clinic - a

File №	Patient	DOB	Case	Case Category
0000000969	Sir Rufus O'Hare Bastian	15/06/2012	52	Test Case

[Form](#)

Description

Change Case Assignment Button

For Admins: This button appears if the current user has the provider setting "Can be a caseworker" and the role "Can assign cases to self" enabled.

If selected, the current assignments can be either removed or changed to a different location(s) and/or changed to one or more case categories. The functionality of this is explained fully in the [Cases](#) topic (Bulk Assignment).

File No. Link and Case Link

The File No. Link navigates to the patient summary screen. The Case Link navigates to the specific case information screen.

Form Button or View Button

If there is an assignment that has not yet been approved, then the **Form** button will appear — clicking it navigates to the assessment screen where it can be created or performed as needed. To learn more, see [Create New Assessments](#). If an assessment has been approved, then a **View** button will appear where the assessment can be viewed.

Today's Progs

The Today's Progs panel displays all programs involving the current user that occur today.

Today's Progs				
Prog	Prog Schedule Dates	Description	Enrolment Count	
Anger Management Support	01/11/2020 - 30/11/2020	Focus on Post Traumatic Stress Disorder and how to deal with related anger issues.	5 of 5	<button>Attendance</button>

Description

Prog Link

Displays details of the program schedule. To learn more, please see [Program Schedules](#)

Attendance Link

Displays the Program Sessions' Attendee screen where patient enrollees and/or providers can be added to the session. To learn more, please see [Program Sessions](#).

My Progs

The My Progs panel displays all programs associated with the current user.

My Progs					
Prog	Prog Schedule Dates	Description	Enrolment Count	Next Session Date	
Anger Management Support	04/11/2020 - 25/11/2020	Meeting to discuss anger issues, to support sharing of experiences, and offer a sounding board for attendees in a judgement-free environment.	3 of 10	09/11/2020	<div>Manage</div> <div>Edit</div>
Anger Management Support	01/11/2020 - 30/11/2020	Focus on Post Traumatic Stress Disorder and how to deal with related anger issues.	5 of 5	08/11/2020	<div>Manage</div> <div>Edit</div>

Description

Prog Link

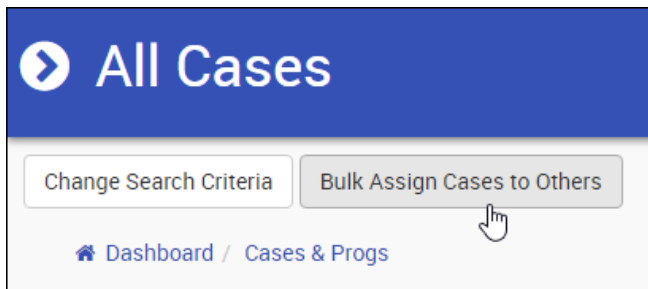
Displays details of the program schedule. To learn more, please see [Program Schedules](#)

Manage and Edit Buttons

These buttons have the same functionality as the Manage and Edit buttons found in the [Program Schedules](#) screen — kindly refer to that topic to learn more.

Bulk Assignment

The Bulk Assignment tool is used to change the assignment of a provider to one or more locations and select one, or more, case categories. From the All Cases screen, select **Bulk Assign Cases to Others**



In the Select Provider field, select a provider and then click **Next**.

The image shows a form titled 'Select Provider'. It contains a text input field with the value 'Dr Andrea Flynn'. To the right of the input field are a small 'x' icon and a dropdown arrow. Below the input field, there are two buttons: a blue 'Next' button and a white 'Cancel' button. A mouse cursor is clicking on the 'Next' button.

The Current Assignment panel displays the current assignment of location and case categories. To remove these assignments, click **Remove Current Assignment**

To change an assignment, in the Change Assignment panel, select one or more locations in the **Change Assignment** panel and then click **Next**.

Note that only locations with the "Enabled for cases" setting of "Yes" will appear as a selection.

Current Assignment - Dr Andrea Flynn

- Bowen Hills: anxiety
- Camperdown Day Suite: alcohol

Remove Current Assignment

Change Assignment

Select locations for **Dr Andrea Flynn**:

☐ Select All

☐ Archived Location

☐ Banksia Park Clinic

☒ Bowen Hills

☐ Brisbane Clinic

☐ Broken Hill Clinic

☐ Burswood Day Facility

☒ Camperdown Day Suite

☐ Westmead Clinic

Next

Cancel

In the Case Categories panel, select one or more case categories for each location, as needed, then click **Assign Selections**.

Case Categories

Select case categories for **Dr Andrea Flynn**:

Bowen Hills

☒ alcohol

☒ anxiety

Camperdown Day Suite

☒ alcohol

☐ anxiety

Assign Selections

Cancel

Bulk Assignment Matrix

The bulk assignments matrix shows both locations and case categories. Individual cells show provider initials and, in parentheses, the number of open cases.

Cell colour definition
Blue: Has a provider, but no open cases;
Orange: No provider and no open cases;
Red: Open cases, but no case worker.

Selecting Compact shows location names, while Expanded shows location descriptions.

For cells with open cases, the text is clickable, enabling you to change or define the assigned provider.

Bulk Assignments						
Compact						
Name	ADL	Clintel Clinic	default	Hobart	MEL	Test
Test by Cat/Loc1 (form, expects daily)	JK (1)	HBW	—	HBW (1)	TB	MS
Test by Cat/Loc2 (form, not expects daily)	TB (1)	BR	HBW	HBW	TP	TB
Test by Cat/Loc3 (no form)	JK (6)	— (1)	TP	—	—	—

Bulk Assignments

Expanded 

Name	Banksia Park Clinic	Default	Melbourne	Perth	Sydney	Test
anxiety	—	OC (2)	—	—	sa	TB
Test 1	—	JK (1)	JK	JK	JK	JK (1)