

# Events Overview

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**Events** allow you to track time and services delivered.

For example, if you:

- See a patient for an Appointment that is a general consultation ( [MBS 104](#))
- You see the patient the following morning (MBS 116)
  - You review the patient's medicare mental health care plan (MBS 2712)

You may wish to bill all three items on a single invoice.

Events allow you to record your activities, to be later turned into a full invoice - these can then be used for DVA claiming, or combined with billing automation to create one-click invoices for services delivered over a longer time period.

## Events Screen

The Events screen has two different views: Expanded and Compact. By default, CareRight remembers the last view that was used and displays the screen in that format. To toggle between both views, click the **Expanded** or **Compact** drop-down arrow.

### Expanded View

In this view, there is a dedicated panel for each event.

ExpandedOldest First

01/02/2016 at 03:18 PM  
Mr System Administrator  
East St Kilda Clinic DESC  
Case: Test Case - 2

Show

104	Specialist, referred initial consultation	\$
116	Subsequent Consultation	\$
12245		\$

14/06/2016 at 01:59 PM to 02/09/2016 at 08:52 AM (80 days)  
Mr System Administrator  
East St Kilda Clinic DESC

Show

105	Review Consultation	\$
104	Specialist, referred initial consultation	\$

### Compact View

In the compact view, the display becomes a grid of services. Services with the same time, provider and location are automatically grouped together, even if they are in different events.

CompactOldest First

	Medical Provider	Service Location	Service Time	Item #	
<input type="checkbox"/>	Mr System Administrator	East St Kilda Clinic DESC	1/2/16 3:18pm	104, 116, 12245	\$
<input type="checkbox"/>	Mr System Administrator	East St Kilda Clinic DESC	14/6/16 1:59pm	105, 104	\$

## Create a New Event

1. [Search](#) for a patient.
2. Click **Show**.
3. In the Main Menu, click **Events**.
4. Click **New**.
5. Case Linking Options
  - a. If linking the new event with a case, click Select for a case.
    - i. Fields from the case will auto-populate within the event. The Staff Member field will auto-populate with the currently logged in user.
    - ii. The **Start Date** fields auto-populate to today's date and time.
    - iii. In the **End Date** field, enter the event's ending date and time.
    - iv. In the **Service Location** field, select the event's service location. This is restricted to the relevant locations for a given service location.
    - v. In the **Service Type** field, select the event's service type.
    - vi. Click **Create Event**.
  - b. If not linking the new event with a case, click Continue without selection.
    - i. The **Staff Member** field will auto-populate with the currently logged in user.
    - ii. Complete other fields per the instructions above.
    - iii. Click **Create Event**.

## Edit an Event

If the user has edit permissions and the event is not locked or deleted, the user will be able to Edit, Strike or Lock the event, (unlock if they have that permission).

### Lock

Some users will have the ability to Unlock and Lock events. This action will unlock that event for anyone who has permission to view and edit events.

## Viewing All Patient Events

To view all patient events:

1. From the Dashboard, click **Events**.
  - a. The Events screen will appear. Click **Search** to narrow results, if needed.
2. **Note:** The Patient, Location and Oldest Event column headers can all be toggled to sort in ascending or descending order.

Events

Search

Search Criteria

- All events (except deleted)
- Unbilled events

Events


Patient	Location	Events	Oldest Event	Actions
Mrs Dot Q O'Barefoot	Westmead Clinic	1	02/02/2016 06:41	Show
Miss Jane Doe	East St Kilda Clinic DESC	1	10/02/2016 14:29	Show
Mr Nick Smith	East St Kilda Clinic DESC	1	14/06/2016 12:29	Show
Mrs Maggie Peggy Carlson	East St Kilda Clinic DESC	1	01/10/2019 13:49	Show

Sort toggling is available for Patient, Location and Oldest Event column headers. In the example below, in the Oldest Event column, we are toggling from oldest to newest (i.e., ascending to descending order):

Oldest Event	Oldest Event
02/02/2016 06:41	01/10/2019 13:49
10/02/2016 14:29	14/06/2016 12:29
14/06/2016 12:29	10/02/2016 14:29
01/10/2019 13:49	02/02/2016 06:41

## Adding Services to Events

The purpose of Services is to capture a record of services performed by a provider during an event. Services are applied to generate billing and claiming information related to the services. Services only exist when they are associated with an event however you can have multiple services associated to one event.



Matti Butcher

My Health Record

Health and disability

Mailhog

Pricing

Facility: ADL   MRN: 000026   CRN: 000001   Home: 510 SCHUMAN HWY, HADLEY NSW 2583  
Female , aged 96 years , born on May 10, 1928 , never admitted

Close

Edit

Delete

Dashboard

 / 

Clients

 / 

Matti Butcher

 / 

Events

 / 

Event

Event was successfully created.

This event is active.

Event

Staff Member

Location

Patient Account

Start Date

End Date

Service Location

Service Type

Dr Dan O'Connor

ADL

ID - Private - Private

20/08/2024 at 12:37 PM (at location)

IP   Adelaide Inpatient

I

Services

Type	Description	Billed?

New

## When adding a service, you can choose the type

Create New Service

General Service

Item Service

Cancel

### Item service

Used primarily for recording a specific item number and quantity. The items presented are typically MBS items.

Item Service

Item\*

15914

x

Quantity\*

1

Create Service

Cancel

### General service

Used for recording general activities or notes. Optionally, a custom (ie: non MBS) item can be supplied or cost; if known - this is not required.

General Service

Item

Select an item number

Cost

25

Note

Provided advice on topic XYZ, and gave patient a sample non prescription cream at cost.

Create Service

Cancel

## Other Actions

Edit / Delete Service

Services can be edited or deleted if the associated event is not locked.

Strike

Events can be struck if they have been created in error and will affect the DVA billing.

## Reporting on Events via Datasets

Events are available in [Data Sets](#).

An example report to retrieve only *General Service* events may look like:

