

Creating an Enquiry

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The process of creating an enquiry is best explained through the following real life scenarios:

- A potential patient calling to enquire on their own behalf.
- A family member, friend or other calling on behalf a potential patient.

Terminology

The following terminology is used in the Enquiries module:

- Enquirer: The Person calling
- Subject: The Potential Patient

N.B. The Enquirer and Subject may be the same person, as per Scenario 1 below.

Scenario 1: Potential Patient Calls

John Smith calls to speak to you about potentially becoming a patient.

Step 1: Check if John Smith has an existing Patient or Contact record

1. Click **Patients**.
2. Type "John Smith" into the Search Box.
 - a. Note: If there are too many search results a you can add his DOB, home phone or mobile number to the search e.g. "John Smith 24/12/1981" or "John Smith 0465625487".

Step 2a: Create an Enquiry - New Potential Patient

If John Smith does not have a Contact or Patient Record:

1. Click the **New Enquiry** (XXX) button at the top of the screen N.B. The XXX above will be the name you searched for e.g. New Enquiry (John Smith).
 - a. The Enquiry Screen will display — complete fields using the table below as reference.
2. To create a New Contact record, select the **Search** button next to the Enquirer name.
 - a. The Search Results will return no results and you can create a new contact record.
3. Select the **Create New Contact** button N.B. You can create an Anonymous Contact, however they will not have a Contact record in CareRight.
4. The following fields are required:
 - a. Facility - this is the location in CareRight that they will eventually be assigned to.

- b. Family Name.
 - c. Given Name.
- 5. We would advise also collecting data that can be used to identify them if they call again, for example:
 - a. Date of Birth.
 - b. Home Phone or Mobile number.
- 6. After you have entered all the necessary data, click **Create Person** button.

CareRight Section	Description	Examples	Required?
Location	Location that the Enquiry is for (prefills from the Contact's facility)	"Clintel Clinic"	Yes
User	Your user name (read only field)		n/a
Start Date / Time	The date / time of Enquiry (prefills to today / now)	"01/07/2016"	Yes
Enquirer	The person calling / enquiring (prefills to the Contact just created)	"John Smith"	Yes
Subject	The person seeking treatment - this defaults to the Enquirer in this scenario (prefills to the Contact)	"John Smith"	Yes
Enquiry Text	Details of the Enquiry	"Primary concern is Alcohol abuse, this is the first time John is seeking treatment..."	No

- 7. This takes you to the Enquiry screen — complete fields using the table below as reference:

CareRight Section	Description	Examples	Required?
Location	Location that the Enquiry is for (prefills from the Contact's facility)	"Clintel Clinic"	Yes
User	Your user name (read only field)		n/a
Start Date / Time	The date / time of Enquiry (prefills to today / now)	"01/07/2016"	Yes

CareRight Section	Description	Examples	Required?
Enquirer	The person calling / enquiring (prefills to the Contact just created)	"John Smith"	Yes
Subject	The person seeking treatment - this defaults to the Enquirer in this scenario (prefills to the Contact)	"John Smith"	Yes
Enquiry Text	Details of the Enquiry	"Primary concern is Alcohol abuse, this is the first time John is seeking treatment..."	No

8. Now that you have created the contact record you will need to select the **Search** button in Subject.

9. Select the **Create Enquiry** button to Save.

10. At this point, if your system administrator has set up a more detailed enquiry form, you are able to use this to capture more information.

Step 2b: Create an Enquiry - Existing Potential Patient / Patient

If John already has a Contact or Patient Record:

1. Click the **Enquiry** button next to John's name in the Search results.
 - a. This takes you to the Enquiry screen — complete fields using the table below as reference.
2. After you have filled in the fields above, click **Create Enquiry** to Save.
 - a. At this point, if your system administrator has set up a more detailed enquiry form, you are able to use this to capture more information.

CareRight Section	Description	Examples	Required?
Location	Location that the Enquiry is for (prefills from the Contact's facility)	"Clintel Clinic"	Yes
User	Your user name (read only field)		n/a
Start Date / Time	The date / time of Enquiry (prefills to today / now)	"01/07/2016"	Yes
Enquirer	The person calling / enquiring (prefills to the Contact just created)	"John Smith"	Yes

CareRight Section	Description	Examples	Required?
Subject	The person seeking treatment - this defaults to the Enquirer in this scenario (prefills to the Contact)	"John Smith"	Yes
Enquiry Text	Details of the Enquiry	"Primary concern is Alcohol abuse, this is the first time John is seeking treatment..."	No

Scenario 2: Calling on Behalf of a Potential Patient

Mary Smith calls to speak to you about her son John Smith potentially becoming a patient of yours.

Step 1: Check if Mary Smith has an existing Patient or Contact record

1. Click **Patients**.
2. Type "Mary Smith" into the **Search** Box.
3. If there are too many search results a you can add her home phone or mobile number to the search e.g. "Mary Smith 0465625487".

Step 2a: Create a Contact Record for the Caller (Enquirer)

If Mary Smith does not have a Contact or Patient Record:

1. Click the **New Enquiry** (XXX) button at the top of the screen.
 - a. The XXX above will be the name you searched for e.g. New Enquiry (John Smith).
2. Click the **Create New Contact** button.
 - a. You can create an Anonymous Contact, however they will not have a Contact record in CareRight.
3. The following fields are required:
 - a. Facility - this is the location in CareRight that the potential patient will eventually be assigned to.
 - b. Family Name.
 - c. Given Name.
4. We would advise also collecting data that can be used to identify them if they call again, for example:
 - a. Home Phone or Mobile number.
 - b. After you have the necessary data, click Create Person.
5. This takes you to the Enquiry screen — complete fields using the table below as reference.
6. You now need to search for the Subject - in this case Mary's son John Smith.
7. Click into **Subject** - type the name of the potential patient e.g. John Smith > Click **Search**

- a. If the potential patient (subject) appears in the search results click the **Select** on the right of their name - this takes you back to the Enquiry screen.
8. If the potential patient is not in the search results, click **Create New Contact**.
9. The following fields are required:
 - a. Family Name.
 - b. Given Name.
10. We would advise also collecting data that can be used to identify them if they call again, for example:
 - a. Facility - this is the location in CareRight that they will eventually be assigned to.
 - b. Date of Birth.
 - c. Home Phone or Mobile number.
11. After you have entered any necessary data, click **Create Person**, which takes you back to the Enquiry screen.
12. After you have filled in the fields on the Enquiry screen, click **Create Enquiry** to Save.
13. At this point, if your system administrator has set up a more detailed enquiry form, you are able to use this to capture more information.

CareRight Section	Description	Examples	Required?
Location	Location that the Enquiry is for (prefill from the Contact's facility)	"Clintel Clinic"	Yes
User	Your user name (read only field)		n/a
Start Date / Time	The date / time of Enquiry (prefills to today / now)	"01/07/2016"	Yes
Enquirer	The person calling / enquiring (prefills to the Contact just created)	"Mary Smith"	Yes
Subject	The person seeking treatment - this defaults to the Enquirer - so this needs to be changed in this scenario - see step 7	"John Smith"	Yes
Enquiry Text	Details of the Enquiry	"Primary concern is Alcohol abuse, this is the first time John is seeking treatment..."	No

Step 2b: Create a Contact Record for the Caller (Enquirer)

If Mary Smith already has a Contact or Patient Record:

1. Click the **Enquiry** button next to Mary's name in the search results.

- a. This takes you to the Enquiry screen, fill in the fields as follows.
2. You now need search for the **Subject** - in this case Mary's son John Smith.
3. Click into **Subject** - type the name of the potential patient e.g. John Smith > Click **Search**.
4. If the potential patient (subject) appears in the search results click **Select** - this takes you back to the Enquiry screen.
5. If the potential patient is not in the search results, click **Create New Contact**
6. The following fields are required:
 - a. Family Name.
 - b. Given Name.
7. We would advise also collecting data that can be used to identify them if they call again, for example:
 - a. Facility - this is the location in CareRight that they will eventually be assigned to.
 - b. Date of Birth.
 - c. Home Phone or Mobile number.
8. After you have entered any necessary data, click **Create Person**
 - a. This takes you back to the Enquiry screen
9. After you have filled in the fields on the Enquiry screen, click **Create Enquiry** to Save.
10. At this point, if your system administrator has set up a more detailed enquiry form, you are able to use this to capture more information.

CareRight Section	Description	Examples	Required?
Location	Location that the Enquiry is for (prefills from the Contact's facility)	"Clintel Clinic"	Yes
User	Your user name (read only field)		n/a
Start Date / Time	The date / time of Enquiry (prefills to today / now)	"01/07/2016"	Yes
Enquirer	The person calling / enquiring (prefills to the Contact just created)	"Mary Smith"	Yes
Subject	The person seeking treatment - this defaults to the Enquirer - so this needs to be changed in this scenario - see step 3	"John Smith"	Yes
Enquiry Text	Details of the Enquiry	"Primary concern is Alcohol abuse, this is the first time John is seeking treatment..."	No

