Edit a Provider

Last Modified on 20/02/2024 4:23 pm ACDT

Once a Provider is added/created in CareRight you will need to edit the record to add additional information.

- Certifications - Any qualifications, courses or certifications e.g. Criminal History Check. The lists are managed via Generic Codes.
- Allocations - If are not using Groups to specify Locations the User has access to, you can do it here.
- Addresses - Add one or more addresses for the User.
- Medical Provider Information
- Accounting Information - This information is relevant to invoicing.
- Prescribing information
- If utilising Online Booking, setting up a public facing bio, display name and profile picture.

Editing Provider Information

From CareRight Dashboard:

1. In the Main Menu, click **Providers**.
2. Locate the Provider you wish to edit.
3. Select the **Show** button next to their name
4. The Provider record will display, with the following additional sections available:
    - Certifications
    - Allocations
    - Addresses
    - Statutory Reporting
    - Calendar
    - Cases
    - Secure Messaging
        1. EDI
        2. NZMC
        3. Primary External Identifier - any identifiers used in external systems.
    - Medical Provider Details
    - Accounting
    - Prescribing
5. Update / edit the relevant details.

Certifications

This section allows for the input of the Providers qualifications and certifications. You can add New, View (Show), Edit or Delete certifications in this section.

1. Select the **New** button to add new details
2. Complete fields using the table below for reference.
3. Click **Create Staff Certification**.

Field	Description	Example
Name	This is a drop down list (this can be updated with additional values in System Administration> Generic Codes)	
Provided By	This is a drop down list (this can be updated with additional values in System Administration> Generic Codes)	
Valid From	This is a date / calendar field	
Valid To	This is a date / calendar field	

Allocations

This section allows for the Allocations to be set. You can add New or , View (Show) allocations in this section.

1. Select the **New** button to add new details
2. Select from the drop-down box
3. Click **Create Staff Allocation**.

Field	Description	Example
Location	This is a drop down list of the Locations set up in CareRight.	

Cases

In the **Can be a caseworker** field, select the checkbox to specify that the provider can also be classified as a caseworker. If selected and the provider also has the role **Can assign cases to self**, then the **Change Case Assignment** button is activated for the user in the My Cases & Progs screen.

Medical Provider Details

This section allows for the Details to be set for the Medical Provider.

1. Select the **Edit** button on the Provider record to update the following fields in the table below.
2. Click **Update Staff Member**.

Field	Description	Example
Manually Set Medical Provider Display Name (check box)		
Medical Provider Display Name	This defaults to the name entered.	
Default Provider Number	Enter the providers default Provider number (it should have 8 characters, if it only has 7 please add a leading 0)	
Hearing Services Qualified Practitioner Number	This number only relates to Practitioners working in Hearing Services	
Accounting Initials	This defaults to the name entered.	
Is a Hospital??	This is a check box (Yes or No) Note: This value is important for In Hospital Claiming (Eclipse/Thelma).	Yes
Auto cc referrers on requests	This is a check box (Yes or No) - this means that any requests will be cc'd to the Patients referrer	Yes
Qualifications		

Accounting

This section allows for the Accounting details to be set for the Medical Provider. This section is important as it sets the information which links to the Patients Invoices

1. Select the **Edit** button on the Provider record.
2. Complete fields using the table below for reference.

3. Click **Update Staff Member**.

Field	**Description**	**Example**
Rate Table	Select the applicable Rate table from the Drop down. If the medical provider has an individual rate table other than the Default, See how to Add a new rate Definition in System Admin Guide.	Default
Default Service Location	Set a default location for this Medical Provider	Adelaide
Default Hospital Claim Type	This field sets the Providers default Hospital Claim Type.	Agreements
Default Informed Financial Consent	This sets the Providers default Hospital Consent.	Verbal
Linked Bank Account	This is the Providers linked bank account. This is a drop-down selection. The Bank account first needs to be set up in Administration>Accounting>Bank Accounts.	165059 1234567 Dr. R Ned
ABN		
ABN Title		
BPAY Biller Code		
Is a referral required for all invoices? (checkbox)	This value ensures the provider is available in the 'To:' drop list when adding a patient referral	Yes / True / Checked
Include in invoicing associates list (checkbox)	Enable the checkbox for this Provider to come up when creating invoices. This is Mandatory to tick	Yes / True / Checked
Include in account management entities (checkbox)	This is Mandatory to tick	Yes / True / Checked
Always the service provider for their own accounts (checkbox)	This value will remove the requirement for a user to confirm the service provider for each invoice. This enables the Account Provider = Service Provider for Practise Billing/Invoicing (reducing steps).	Yes / True / Checked

Field	Description	Example
Enable rate overrides for private accounts (checkbox)	There is additional set up in Administration>Accounting for this function to work – refer to Systems Administration Guide.	Yes / rue / Checked
Item is not normal after care by default	• This cover telehealth, phone items and face to face consults. Items are 105, 91823 and 91833 • Enable this if you want to enable consultation for this provider.	
TYRO Merchant Identifier	Applicable if Tyro has been configured to work with CareRight. MID is provided by Tyro and can be entered hear	
Use Terminal's MID instead		

Prescribing

This section allows for the Prescribing details to be set for the Medical Provider. This section is important if medication are being prescribed using MIMS.

1. Select the **Edit** button on the Provider record (use the table below for reference).
2. Once complete, select **Update Staff Member**.

Field	Description	Example
Prescriber Number		
Prescription Authority Number	This is a drop down list of the Locations set up in CareRight.	
Default Prescriber S8 Warrant / Permit Number		
Prescription Passphrase		
Prescription Passphrase Confirmation		

Field	Description	Example
Clear Prescription Passphrase (check box)		
Script Paper		
Disable ePrescriptions (check box)		
Prescriber (specialist) qualification		
Enable National Data Exchange (SafeScript/ScriptCheckSA/QScript) Real Time Prescription Monitoring (check box)		
Prescription Provider Number	This is a search field, a patient name can be entered.	

If you are using ePrescribing with Medisecure Setup, you can configure your National Data Exchange credentials

Medical Provider Holidays

You can record that a provider is taking a holiday. This is done via the administration section and will be managed by your system administrator.