Managing Patients

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Patient Summary

Adding a Patient

1. From the CareRight Dashboard
2. Select **Patients** from the menu.
3. Enter the patient name (e.g., John Smith).
4. Select **Search** button — ‘no matching records found’ will appear.
5. Click **Create New Patient**.
6. Fill in all the relevant fields (not all are mandatory)
7. Select **Create Patient** button
    a. New Patient form screen will display.
8. Fill in all relevant values in the following sections:
    a. Patient Demographics
    b. Residential Address
    c. Phone / Email
    d. Health Fund Details
    e. Referral Details
    f. Issues
    g. Alert / Notices
9. Select **Approve** button.

Patient Banner

Whenever you are in the patient's record, you will see the banner at the top of the page. The banner contains key information about the patient. The banner will usually be Blue in colour, however if the Patient has an Alert. Allergy or Notice on file it will be Red.

Patient Menu

The Patient menu on the left side of the main dashboard will display items relevant to a patient. Some or all of these will display depending on which modules you use.

Menu / Module Name	Description
Accounts	To set up/ review Patient Account options for billing.
Admissions	This is specific to Day Surgery's – Admission of Patient – also allows for Statutory reporting compliance.
Alerts and Allergies	Alerts are flags that let users know important information (usually clinical) relating to the patient. Allergies can also be attached to a patient, so users know of any adverse reactions to drugs, food, animals, materials, etc.
Appointments	
Assessments	Assessment templates and forms can mirror your required business process practice (i.e. new client form, an initial assessment, a medical or clinical assessment, surveys etc) therefore using assessments will depend on the types of templates and forms that your organisation uses.
Cancer Notifications	This is summary of Patient Cancer Notifications.
Cases	
Clinical Notes	All your clinical notes can be stored against a patient and are fully reportable. This removes the need to hand write notes and allows other

	staff members (where appropriate) to see notes you have written in real time.
Correspondence	CareRight's allows for the creation of the following types of correspondence: SMS, Email and Letters.
Current Admission	This will only display when your patient is currently admitted.
Diagnosis & History	This is where you can record a patient's diagnosis / problems / illness.
Discharge Planning	This will only display when your patient is currently admitted.
Documents	CareRight allows for scanned/electronic documents to be saved against a patient record.
Events	
Follow ups	CareRight allows you to assign a document to a staff member and mark it for Follow Up by a certain date.
Image Gallery	Images can be uploaded into the patient record. These can then be categorised, compared or drawn on.
Invoices and Credits	From the invoices and credits menu, you can view the following you can view Unpaid invoices (private, Medicare, DEVA, Health fund & 3rd party).
Measurements	Different types of patient measurement details can be recorded in this screen. This is customisable to align with your organisational needs.
Medications	This accesses the Medication component which also has the capability to integrate MIMS (if licensed)
Notices	Notices are flags that let users know important non-clinical information relating to the patient. These will appear in the Banner for any users to see whilst in the patient's record.
Pathology & Radiology	CareRight can allow for the receiving and sending of pathology requests and results. The system can be utilised for storing results, however, not for storing large images.
Pictures	This Pictures area is used to store headshots of your patient. The current photo can be used in the Banner.
Referrals	CareRight allows you to record a referral against a patient record. This can be a GP(LMO) or a specialist provider.

Tasks	
Workflows	Workflow is a progression of steps (tasks/events/interactions) that comprise a business process.

Editing a Patient Record

1. From the Patient record / Summary.
2. Select the **Edit** button.
   a. The Edit Patient Details screen will display.
3. In this screen you can edit / add the following:
   a. Identity
   b. Demographics
   c. Government Benefits (Medicare/Pension/DVA)
   d. Health Fund information
   e. Accounting (if the patient is Private, Pensioner or Veteran)
   f. Contact Details (Phone, Email, correspondence consent)
4. Enter the relevant details.
5. Select **Update Patient**.
   a. The Patient record is now updated.

Online Patient Verification (OPV)

The OPV button allows you to verify that the Medicare, DVA and/or health fund details entered for the patient are valid. It will only verify against data entered against the patient record. Verifying these patient details is essential when invoicing and claiming through CareRight.

1. From the Patient record.
2. Select **OPV** button (this will appear under the Patient Banner).
   a. Process for verification will start.
3. The system will verify the details and confirm with a message.

4. If there are differences in the details and message advising you of this will display, prompting you to verify with the patient.