

When I upgraded to 6.66, why did some of my templates change?

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Change to template selection in 6.66

Description

If your CareRight install uses custom print templates utilising more than two override conditions on a template you will need to review your templates to ensure the desired template will still be selected.

Introduction

CareRight contains the ability to define different print templates for different doctors and different locations. This allows the customisation of headers and footers to match the specific doctor or location.

The setup for these templates allows you to define the following overrides:

- Provider
- Location
- Service Location
- patient Account Type
- Service Provider

Override

Provider	Select a provider	▼
Location	Camperdown Day Suite	✕ ▼
Service Location	Select from list	▼
Patient Account Type	Select from list	▼

Override

Provider	Select a provider	▼
Location	Select from list	▼
Service Location	Select from list	▼
Service Provider	Select from list	▼

The available templates can be classified into the following groups

- Financial
- Letter Writing
- Pathology / Radiology Requests
- Cancer Notification

- HC21 Hosiptal Admission Claims Forms

Prior to CareRight release 6.66 the process on applying overrides varied based on the above groups and also had some unintended combinations that would result in incorrect templates being used.

New Selection Process

In CareRight version 6.66 the template selection process has been homogenised to ensure consistent and predictable template selection. The order that matches are processed is based on the following specific order of matches.

1. provider, service location. location, patient account type
2. provider, service location, location, service provider
3. provider, service location, location
4. provider, service location, patient account type
5. provider, location, patient account type
6. service location, location, patient account type
7. provider and service location
8. provider and patient account type
9. provider and location
10. location and service location
11. location and patient account type
12. service location and patient account type
13. service provider and provider
14. service provider and location
15. service provider and service location
16. provider
17. service location
18. patient account
19. location
20. service provider

Previous Selection Process

Previously some combinations were not tested for and thus a different template would be selected. The previous process ignored many combinations.

1. provider and service location
2. provider and patient account type
3. provider and location
4. provider
5. service location
6. patient account
7. location
8. service provider

Identifying Problems

Clients should review any templates that meet ANY of the following criteria:

- More than two override conditions
- Two override conditions where one is not a provider

Change the overrides to match the old selection criteria by removing the ignored override fields.
