

Access Patient Accounts

Last Modified on 18/06/2021 9:08 am ACST

Access patient accounts

1. From CareRight Dashboard
2. Search for a patient and select the **Show** button next to the relevant patient
3. The Patient details will display
4. Select **Accounts** from the menu
5. The Patient Accounts screen shows the following for Patient Accounts and Inactive Accounts (please refer to the table below).
6. From the Patient Accounts screen you can:
 1. Create a New Account - see [Add a New Patient Account](#)
 2. Create a New Invoice - see [Invoice from Patient Account](#)
 3. Create Enquiries - See [Review an Existing Account - Enquiries](#)
 4. Take a Deposit - see [Take a Deposit or Credit](#)
 5. Accept Payment from Patient or Guarantor - see [Create Receipt](#)
 6. Take a refund - See [Refunds](#)
 7. To create an Estimate - See [Estimate from patient account](#)

CareRight

Dashboard

Clients

Mr Andrew Anderson

Accounts

Admissions

Alerts and Allergies

Appointments

Assessments

Cancer Notifications

Cases & Programs

Clinical Notes

Correspondence

Current admission

Diagnosis & History

Discharge Planning

Documents

Events

Followups

Image Gallery

Invoices & Credits

Measurements

Medications

Notices

Mr Andrew Anderson

MRN: 000159

CRN: 10999

Fund: iTest Health Fund, 8675309 1

Male , aged 72 years , currently admitted to Clintel Rehabilitation Centre . Mobile Phone: 0426286951

Male Assessor

Suicide Risk

Blood Thinner

Codeine

Consent Required

Consent Changed

ACTIVE

INACTIVE

New Account

New Invoice

New Deposit

Payment From Patient

Payment From Guarantor

Dashboard / Clients / Mr Andrew Anderson

Hosp Clintel HOSPITAL - Clintel Hospital

Guarantor	Name	Balance			
BUPA Australia	BUPA Australia	\$405.40	Enquiries	Invoice	Estimate
Department of Veterans Affairs	Department of Veterans Affairs	-\$200.00	Enquiries	Invoice	Estimate
iTest Health Fund	iTest Health Fund	\$1,000.00	Enquiries	Invoice	Estimate

Dr Ian JONES

East St Kilda

Guarantor	Name	Balance			
BUPA Australia	BUPA Australia	\$0.00	Enquiries	Invoice	Estimate
iTest Health Fund	iTest Health Fund	\$51.60	Enquiries	Invoice	Estimate
Private	Private	\$0.00	Enquiries	Invoice	Estimate

Group View of Patient Account

Patient Account content can be grouped according to

1. Account Provider (default) or
2. Location or
3. Guarantor

To select a grouping option, click the Grouping icon and select an option from the drop-down list. If the grouping is changed, the new selection will be remembered for all subsequent visits until changed again.

ACTIVE

INACTIVE

New Account

New Invoice

New Deposit

Payment From Patient

Payment From Guarantor

Dashboard / Patients / Mr Caleb James Gray

ALLIANZ - Banksia Park Clinic

Account Provider

Location

Guarantor

1. Account Provider Group

When this grouping option is selected, the screen will group all content by Account Medical Provider (sorted alphabetically by the first name). Content within each Provider panel will be grouped by Account Location (sorted alphabetically by description). Lastly, tabular content within Account Location is sorted by Guarantor name.

Dr Magus POLAN					
Burswood Day Facility					
Guarantor	Name	Balance			
iTest Health Fund	iTest Health Fund	\$0.00	Enquiries	Invoice	Estimate
Clintel Clinic					
Guarantor	Name	Balance			
Medicare	Medicare	-\$33.30	Enquiries		
Medicare	Medicare	\$132.40	Enquiries	Invoice	Estimate

2. Location Group

When this grouping option is selected, the screen will group all content by Account Location (sorted alphabetically by description). Content within each Location panel will be grouped by Account Provider (sorted alphabetically by first name). Lastly, tabular content within Account Provider is sorted by Guarantor name.

Banksia Park Clinic					
Dr Juan KRILL					
Guarantor	Name	Balance			
ALLIANZ	JK - Legal - ALLIANZ	-\$100.00	Enquiries	Invoice	Estimate
Private	JK - Private - AMA	\$0.00	Enquiries	Invoice	Estimate
Dr William BILL					
Guarantor	Name	Balance			
Private	WB - Private - Normal	-\$200.00	Enquiries	Invoice	Estimate

3. Guarantor Group

When this grouping option is selected, the screen will group all content by Guarantor (sorted alphabetically by name). Content within each Guarantor panel will be grouped by Account Location (sorted alphabetically by description). Lastly, tabular content within Account Location is sorted alphabetically by description.

iTest Health Fund

Burswood Day Facility

Medical Provider	Name	Balance			
Dr Magus POLAN	MP - Fund - iTest Health Fund	\$0.00	Enquiries	Invoice	Estimate

Clintel Clinic

Medical Provider	Name	Balance			
Capt St Kilda East HOSPITAL	LL - Fund - iTest Health Fund	\$2,699.40	Enquiries	Invoice	Estimate

East St Kilda Clinic DESC

Medical Provider	Name	Balance			
Dr Magus POLAN	MP - Fund - iTest Health Fund	-\$719.60	Enquiries		
Dr Magus POLAN	MP - Fund - iTest Health Fund	\$226.40	Enquiries	Invoice	Estimate