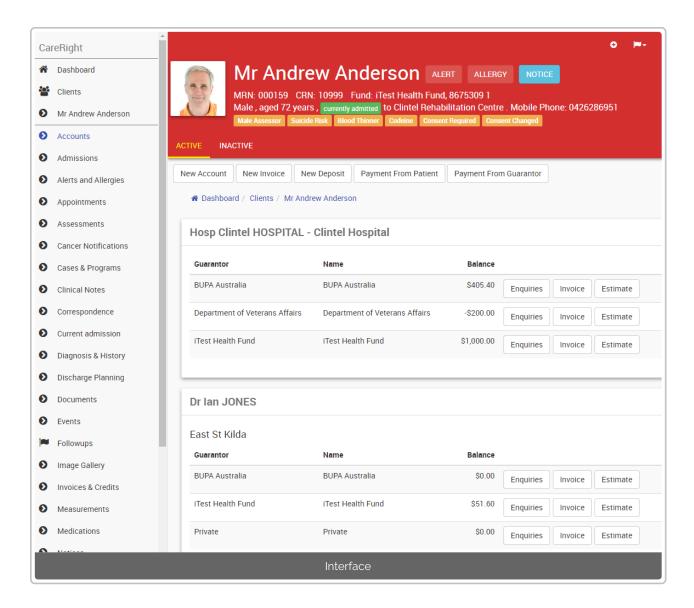
### **Access Patient Accounts**

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



# **Group View of Patient Account**

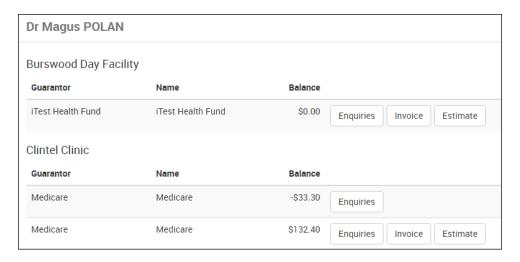
Patient Account content can be grouped according to

- 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.

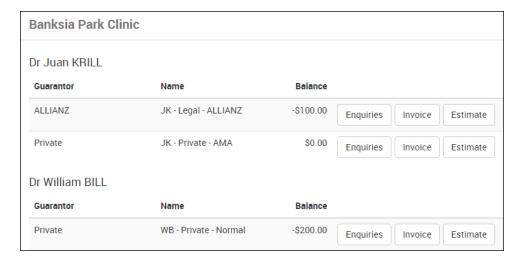


When this grouping option is selected, the screen will group all content by Account Medical Provider (sorted alphabetically by the first name). Content within each Provider panel will be grouped by Account Location (sorted alphabetically by description). Lastly, tabular content within Account Location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



#### 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.



#### 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.

