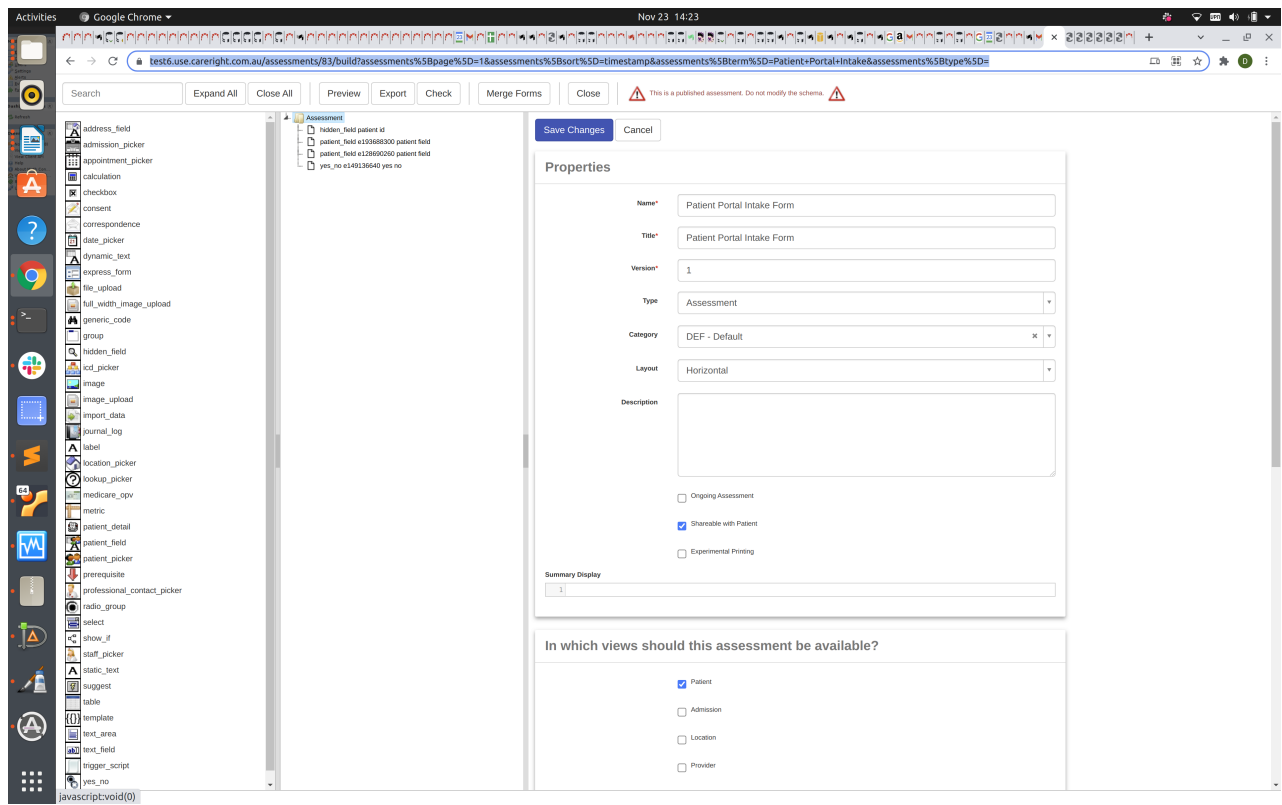


Patient Portal - Assessments

Last Modified on 30/04/2025 11:08 am ACST

Making an Assessment Shareable

Any assessment can be made shareable with a Patient. Consider carefully what information you include. Simply tick "Sharable with patient" when creating the Assessment.



Patient Experience

Patients can receive a request to complete an assessment via three mechanisms. Once a staff member creates a new **Assessment** and it is **shareable**, on the patient record are the options to share this.

- Email - if they have provided clinical email consent and a valid email
- SMS - if they have provided clinical sms consent and a valid phone number
- QR Code - scanning a link on their mobile device

IMPORTANT NOTE: Link can only be accessed in a single tab(browser). If a user is unable to reopen, user must ensure there's no active tab open on browser with the link to the Assessment.

Current Assessments				Newest Created	Any State	Search...	Q
Assessment:	Patient Portal Intake Form 1 - Patient Portal Intake Form			Show			
Status:	Draft			Created:	06/12/2021 at 03:14 PM (+1030)		
Assessment:	Patient Portal Intake Form 1 - Patient Portal Intake Form			Created:	01/12/2021 at 02:34 PM (+1030)		
Status:	Draft			Performed By:	daniel o'connor Clintel		
Performed By:	daniel o'connor Clintel			Performed At:	01/12/2021 at 02:34 PM (+1030)		
Assessment:	Patient Portal Intake Form 1 - Patient Portal Intake Form			Created:	01/12/2021 at 02:16 PM (+1030)		
Status:	Draft			Performed By:	daniel o'connor Clintel		
Performed By:	daniel o'connor Clintel			Performed At:	01/12/2021 at 02:16 PM (+1030)		

Example invitation email:

From

Example Care Team <example@example.org.au>

Show headers

Subject

[CareRight test6.use] Request: Patient Portal Intake Form - 1

To

daniel@clintelsystems.com

HTML

Plain text

Source

MIME

YOUR LOGO

Innovation is our tradition.

Hi Rufus Bastian,
There is a [new secure form](#) to fill out.

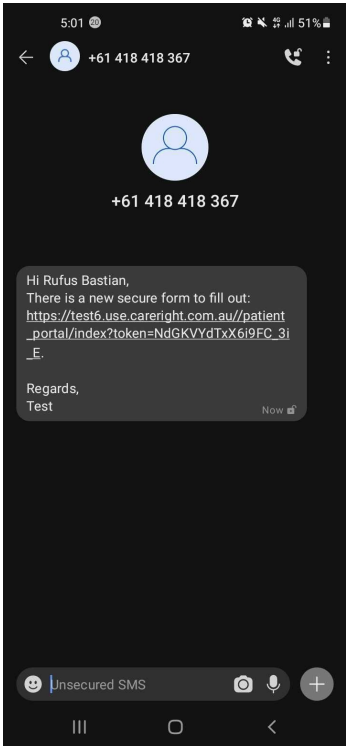
Regards,
Test

123 Example Rd
Signaturetown, NSW, 2000
Ph: 1800 000 000

University of
Victoria

74399 Broadway, New York, NY 13498

Example invitation SMS



Example QR Code

The screenshot shows a patient profile for 'Mr Patient Test2' with MRN: 0000000959 and CRN: ERN. The patient is a 21-year-old male born on July 22, 2000. A 'Share by QR Code' modal is displayed over the 'Current Assessments' section. The modal contains a QR code and a 'Close' button. The background interface includes tabs for 'CURRENT', 'SUGGESTED', and 'ARCHIVED' assessments, and a list of current assessments with details like 'Assessment: NDIS AT 0.12 - General Assistive Techno', 'Status: Draft', and 'Created: 18/11/2021 at 01:52 PM (+1030)'.

Many of these settings can be customised under **System Administration > Branding Settings**

Email Messages and SMS Messages can be customised.

The screenshot shows the 'Message types' configuration page. It has a blue header with a 'Message types' title and a search bar. Below the header, there are tabs for 'CURRENT' and 'ARCHIVED'. The main content area is titled 'Message Types' and contains a table with columns: 'Code', 'Description', 'Category', and 'Enabled'. The table lists two message types: 'email-patient-portal-assessment' and 'sms-patient-portal-assessment'. Each row has buttons for 'Templates', 'Edit', and 'Disable'.

Code	Description	Category	Enabled
email-patient-portal-assessment	Patient Portal Assessment to Complete	Patient Portal Assessment Email	•
sms-patient-portal-assessment	Patient Portal Assessment to Complete	Patient Portal Assessment SMS	•

Mobile device experience

Patients following a valid link will be taken to the assessment to complete.

5:02

test6.use.careright.com.au/pati

ctintel

Welcome

Patient Portal Intake Form

Required fields marked with *

Given name

Rufus

Family Name

Bastian

Do you consent to procedure X?

Yes No

Submit for approval

Once they have completed the process, the link they used is expired, and they are prompted to close the browser.

5:03

test6.use.careright.com.au/pati

ctintel

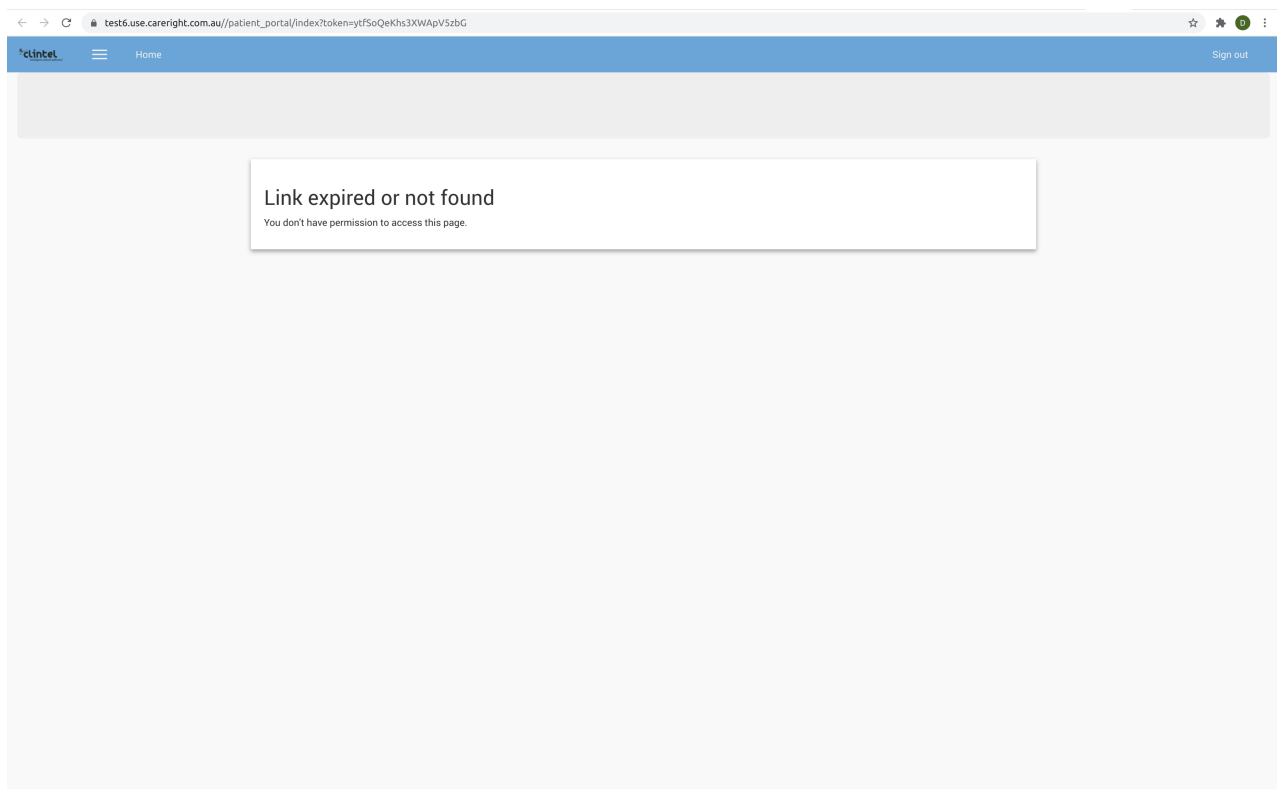
Done

You may now close your browser

Specific user interface messages can be managed under **System Administration > Translations**, prefixed with "Patient Portal"

Expired links

Links default to a 1 hour expiry., which can be changed under **System Administration > Branding Settings**. If a patient requires access as they did not complete an assessment in time, you can simply generate a new link and share by QR Code, Email or SMS.



Accessing the completed assessment

All patient assessments are considered *Draft* in the system, A provider with *Assessment Runner* access or otherwise the ability to approve assessments may review and finalise the information.

The draft assessment is available under the **Patient Record > Current Assessments**
