

## Patient Portal - Overview

Last Modified on 23/05/2025 9:32 am ACST

As of CareRight 7.8.0; we've extended our core Digital Front Door offerings.

## Configuration

Available under **Admin > Global Settings**.


Digital Front Door Options	
Enable Patient User Portal	<div>Yes ▾</div>
Enable Guarantor User Portal	<div>No ▾</div>
<div>Change</div>	

## Patient Logins

**Active development: This functionality is subject to change, and is not currently available for all customers.**

### Setup new patient user account

Where a patient's email is on file, and the patient portal feature is enabled; users will see the ability to create a new patient login.

	<div>Miss Jane El Hopper <div>My Health Record</div></div> <div>Facility: ADL MRN: 000006 CRN: Female , aged 10 years , born on February 17, 2015 , never admitted</div>
<div><div>Edit</div><div>Create Patient Portal Account</div><div>Print Label▾</div><div>Print Merge Form▾</div><div>Print HC21▾</div><div>New Appointment</div><div>Manage▾</div><div>Search patient record... <div>Q</div></div></div>	

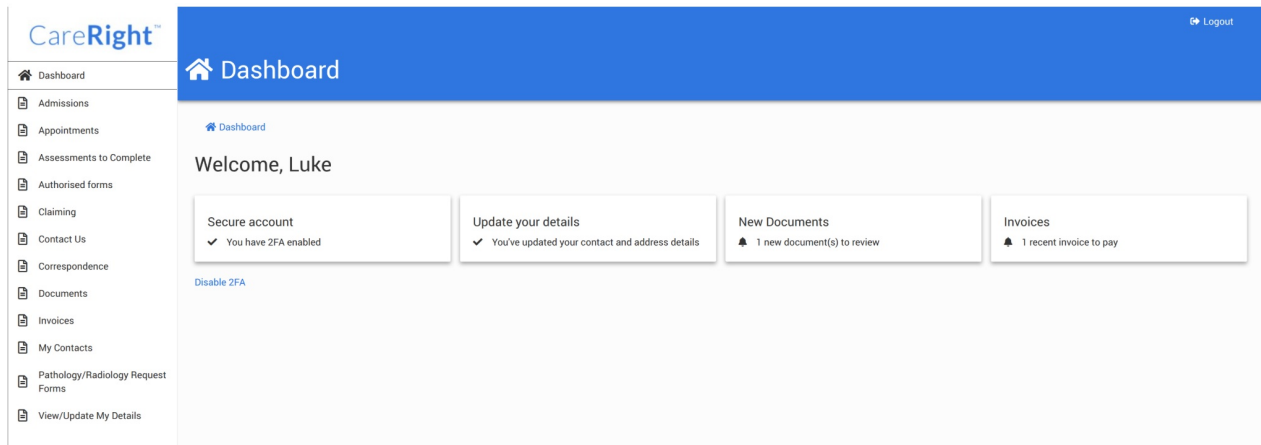
This enables a staff member to set up details:

New Patient	
<div>Dashboard / Patients / Miss Jane El Hopper</div>	
<div>Authentication</div>	
<div>Username *</div>	<div></div>
<div>Email *</div>	<div>example@example.com</div>
<div>Password *</div>	<div></div>
<div>Password Confirmation *</div>	<div></div>
<div><div>Create Patient User</div><div>Cancel</div></div>	

Ensure you communicate this securely with the patient, preferably in clinic.

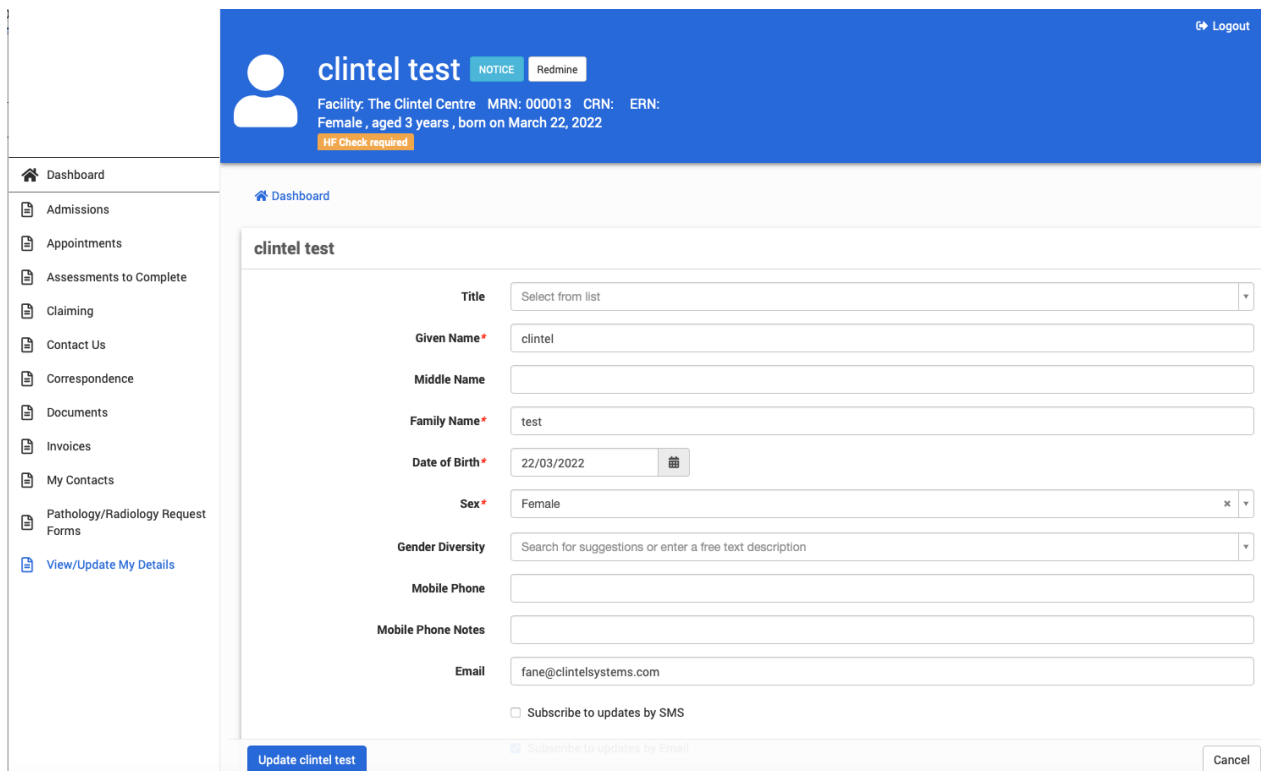
## Patient Login

When patients first login, they are presented with relevant prompts. During the initial login, the patient is required to configure 2FA TOPT and a secure password. (Note: Alternative, more usable secure solutions such as Passkeys are under consideration; to improve this first login experience).



The screenshot shows the CareRight patient dashboard. The top navigation bar is blue with the CareRight logo on the left and a 'Logout' link on the right. A sidebar on the left lists various services: Dashboard, Admissions, Appointments, Assessments to Complete, Authorised forms, Claiming, Contact Us, Correspondence, Documents, Invoices, My Contacts, Pathology/Radiology Request Forms, and View/Update My Details. The main content area has a blue header with a home icon and the word 'Dashboard'. Below this, it says 'Welcome, Luke'. There are four white boxes with blue borders: 'Secure account' (You have 2FA enabled), 'Update your details' (You've updated your contact and address details), 'New Documents' (1 new document(s) to review), and 'Invoices' (1 recent invoice to pay). A 'Disable 2FA' link is visible below the first box.

Patients can access and update their core details.



The screenshot shows the 'View/Update My Details' form for a patient named 'clintel test'. The top blue header includes a profile icon, the name 'clintel test', and buttons for 'NOTICE' and 'Redmine'. Below the header, it lists facility information: 'Facility: The Clintel Centre', 'MRN: 000013', 'CRN:', and 'ERN:'. It also states 'Female, aged 3 years, born on March 22, 2022' and has a red 'HF Check required' tag. The sidebar on the left is the same as in the previous screenshot. The main form area has a blue header with a home icon and 'Dashboard'. The form title is 'clintel test'. It contains several input fields: 'Title' (dropdown), 'Given Name' (text, value: 'clintel'), 'Middle Name' (text), 'Family Name' (text, value: 'test'), 'Date of Birth' (text, value: '22/03/2022', with a calendar icon), 'Sex' (dropdown, value: 'Female'), 'Gender Diversity' (dropdown, value: 'Search for suggestions or enter a free text description'), 'Mobile Phone' (text), 'Mobile Phone Notes' (text), and 'Email' (text, value: 'fane@clintelsystems.com'). At the bottom, there is a checkbox for 'Subscribe to updates by SMS' and a link for 'Subscribe to updates by Email'. The form ends with a blue 'Update clintel test' button and a 'Cancel' button.

Dashboard

Address was successfully created.

Mr Luke Alford

Title	Mr
Given Name	Luke
Middle Name	
Family Name	Alford
Date of Birth	11/03/1950
Sex	Male
Gender Diversity	
Pronouns	He/Him
Mobile Phone	0433333333
Mobile Phone Notes	
Email	luke@test.com
Subscribe to updates by SMS	No

Address

Address Type	Address 1	Address 2	Suburb	State	Post Code	Phone	
Home	672 BELVEDERE Street	Example	BLIGH PARK	New South Wales	2756		New Edit
Postal	Second						Edit

A number of features will be made available in coming releases, such as:

- See and pay invoice
- Update next of kin or other relationship information
- Confirm / cancel an appointment
  - Online booking
- Complete a previously shared assessment
- Access documents
- Access pathology request forms or results
- Complete claiming documentation

## Sharing content without a login

### 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

Status: Draft

Created: 06/12/2021 at 03:14 PM (+1030)

Show

Assessment: Patient Portal Intake Form 1 - Patient Portal Intake Form

Status: Draft

Created: 01/12/2021 at 02:34 PM (+1030)

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

Status: Draft

Created: 01/12/2021 at 02:16 PM (+1030)

Performed By: daniel o'connor Clintel

Performed At: 01/12/2021 at 02:16 PM (+1030)

Approve

Copy

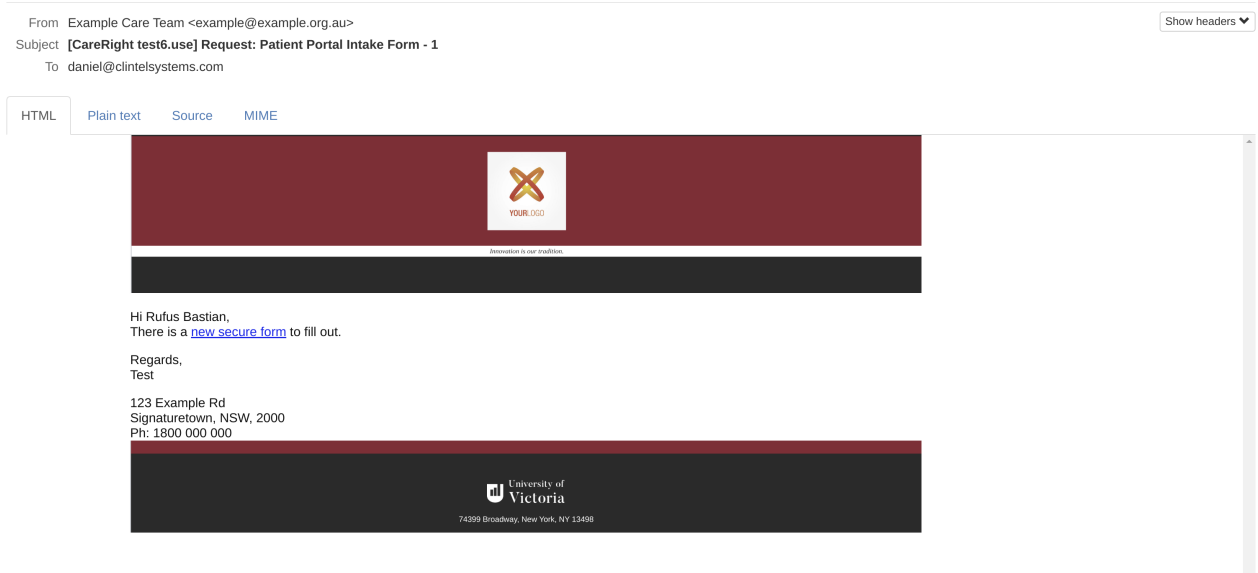
Cancel

Share By Email

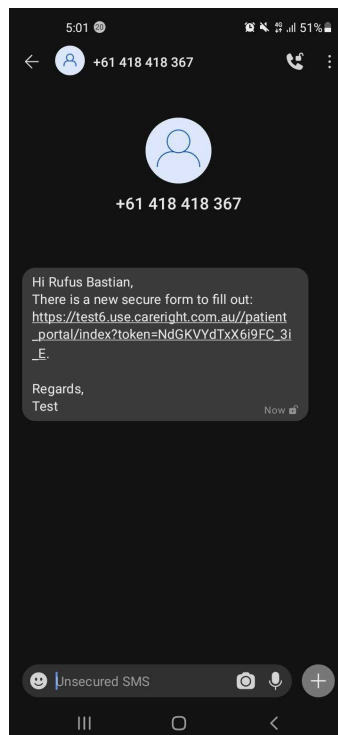
Share By Sms

Share By Qr Code

Example invitation email:



### Example invitation SMS



### Example QR Code

Mr Patient Test2 Clinical Redmine

MRN: 0000000959 CRN: ERN: Male, aged 21 years, born on July 22, 2000, currently admin

CURRENT SUGGESTED ARCHIVED

New

Dashboard / Patients / Mr Patient Test2


Current Assessments

Assessment: NDIS AT 0.12 - General Assistive Techno  
Status: Draft  
Created: 18/11/2021 at 09:33 AM (+1030) Show

Assessment: PPS ONBOARDING 0.1 - Onboarding Intelligent Form  
Status: Draft  
Performed By: Mr System Administrator  
Created: 18/11/2021 at 01:52 PM (+1030)  
Performed At: 18/11/2021 at 01:52 PM (+1030) Continue

Assessment: NPMH-001 1.0 - New Patient Form - GPH  
Status: Draft  
Performed By: Mr System Administrator  
Created: 21/09/2018 at 03:36 PM (+0930)  
Performed At: 21/09/2018 at 03:36 PM (+0930) Continue

Share by QR Code



Close

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

Email Messages and SMS Messages can be customised.

Message types

CURRENT ARCHIVED

New

Dashboard / Administration / Correspondence

Message Types

portal

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

## 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

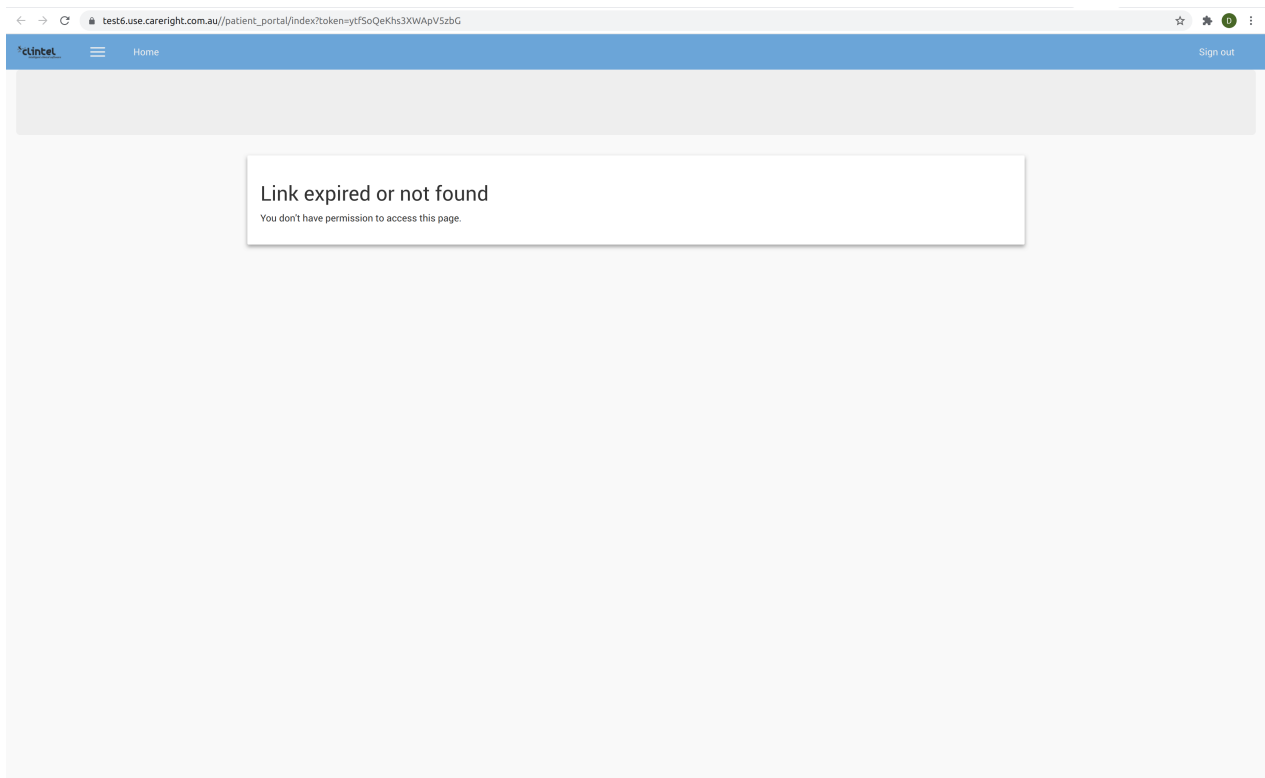
Done

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**

## Sharing Documents

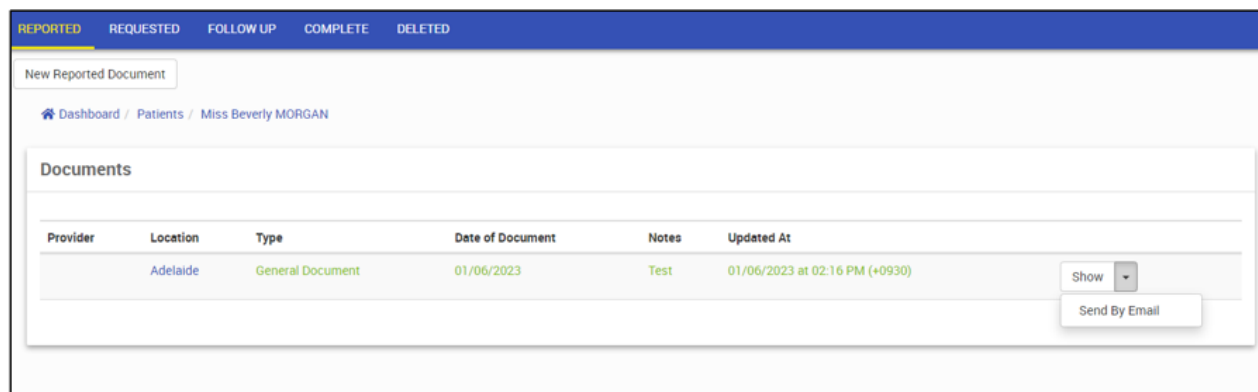
### Share a document securely with a patient via Email:

CareRight has ability to dispatch the pathology and radiology requests automatically to patients via email. Previously, there was only print option available in the screen.

- The patient has email clinical consent set.
- Secure SMTP configured.
- User can send a link with a secure token which includes patient detail and document detail, that expires as per Branding Settings > Expiry.

*Patient - > document - > View a specific (pathology/radiology) result*



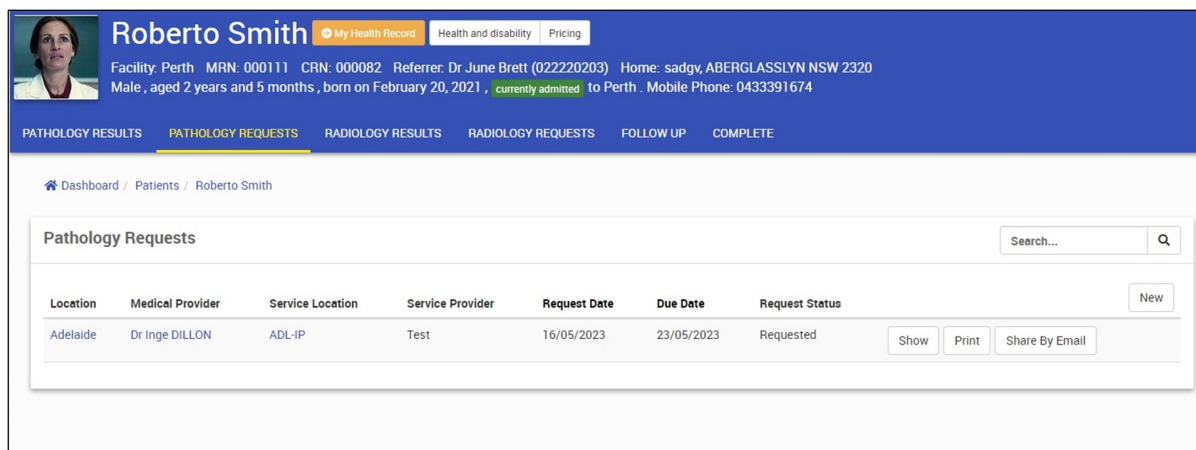


## Sharing Pathology Request Forms, Results

### Share Pathology/ Radiology Request Form by Email:

CareRight offers the functionality to send a pathology/radiology request to a patient via email. The patient will receive a request form through a link, which they can click on to access and view the request form.

- Click on **Dashboard**.
- Search for a **patient**.
- Click on **show**.
- Click on **Pathology & Radiology** from left side menu.
- Click on Pathology or Radiology Requests.
- Click on the **Share By Email** option.
- Once you click system will present message successfully shared.



After sharing, users can check the status under the Correspondence "Outbox" tab.

## Sharing Invoices and Receipts

The system allows user to share a **paid invoice** directly from the Invoice screen using the "**Share Invoice**" button. Users can choose to share the invoice via Email, SMS, or QR code.

### Prerequisites to share via SMS and Email:

- Obtain consent from a patient to share the Clinical Correspondence via SMS.

- Obtain consent from a patient to share the Clinical Correspondence via Email.

**Invoice**

Invoice Number	600
Invoice Status	Paid
Invoice Date	08/08/2024
Invoice Total	\$500.00
Out Of Pocket	\$500.00
GST Total	\$0.00
Medical Provider	Dr Adelaide HOSPITAL
Service Location	Adelaide Inpatient
Referral	
Claim Status	
Claim Information	
Invoice Other Reference	0
Note	

**Line Item**

Service Date	06/08/2024
Item Number	13219
Item Type	Other consultation charge
Description	
Units	1
Price	\$500.00

**Allocations**

Date	Statement	Paid	Adjustment	GST Paid	GST Adjustment
08/08/2024	Receipt	\$500.00	\$0.00	\$0.00	\$0.00

#### Example:

view.'"/>

HTML Plain text Source

Hi Beverly,  
There is a new invoice for you. Please click [view](#).

By clicking the link patient/client can view and download the invoice.

## Obtaining Bulk Billing Consent

### Assignment of benefit and digital signature for telehealth services

From CareRight(CR) version 6.98, CR features a workflow for collecting a signed DB4 Assignment of Benefits PDF via a secure link. This improves telehealth claiming preparation, allowing a one click request for consent.

- System displays the "Request Patient Signature" button in the patient invoice screen when an invoice raised for consultation item types under Medicare and DVA account.
- Request assignment of benefits form can be sent via patient email, SMS or QR Code.

*Additional note: patient consent for sharing clinical correspondence via email or SMS must be taken to send the request form via email or SMS.*

Edit
Reverse
Pay In Full
Pay Online
Request Patient Signature
Print

Dashboard / Clients / Miss Beverly MORGA

Request Assignment of Benefits by Email
Request Assignment of Benefits by SMS
Request Assignment of Benefits by Qr Code

Invoice was successfully created.

Raised

Invoice

Invoice Number	533
Invoice Status	Raised
Invoice Date	29/05/2024
Invoice Total	\$81.30
Out Of Pocket	\$0.00
GST Total	\$0.00
Medical Provider	Dr Inge DILLON
Service Location	OP Adelaide Outpatient
Referral	Referral not required
Claim Status	Unsent
Claim Information	
Invoice Other Reference	0
Note	

Line Item

Show
Edit
Adjustment

Service Date	29/05/2024
Item Number	104
Item Type	Consultation

Once user shared the request for signature, patient will receive a notification. For example:

On following the secure link; patients will be shown an appropriate claim form for either:

- [Medicare Assignment of Benefits](#)
- DVA Treatment Vouchers

*Example signature requirements, Medicare DB4 Assignment of Benefits:*

Signature

Patient, Parent, Guardian or other Responsible Person to complete

☐ \* Yes, I agree to the Assignment of the Medicare Benefits directly to the health professional

Name

Clear

Privacy Note:

Your personal information is protected by law, including the Privacy Act 1988, and is collected by the Services Australia for the assessment and administration of payments and services. This information is required to process your application or claim.

Your information may be used by the agency or given to other parties for the purposes of research, investigation or where you have agreed or it is required or authorised by law.

You can get more information about the way in which Services Australia will manage your personal information, including our privacy policy at [servicesaustralia.gov.au/privacy](https://servicesaustralia.gov.au/privacy) or by requesting a copy from the agency.

Information about medical/dental expenses for people under the age of 18 may also be disclosed to adults on the same Medicare card, through taxation statements.

Confirm
Cancel

Patients may download a copy of the signed form for their reference.

## System configuration: Require Bulk Billing Consent

Refer to [Configurations for Bulk Bill Claim](#) for further general configuration.

When **Require Bulk Billing Consent** is enabled, the system will show any invoices that are not yet ready to claim:

> Unbatched Invoices

Dashboard / Locations / Adelaide Surgical Clinic / Batch Claims / Adelaide Surgical Clinic Batches

Online Invoices

<input checked="" type="checkbox"/>	Inv Guarantor	Medical Provider	Inv Count
<input checked="" type="checkbox"/>	Medicare	Dr Inge DILLON	1
<input checked="" type="checkbox"/>	Medicare	Dr Darlene HALL	1

Batches will only be created for doctors selected.

Create Batch Claims

Requires Consent

Search...

Q

Invoice Number	Invoice Date	Medical Provider	Patient	Amount
677	18/10/2024	Dr Barbara HOFFMAN	Miss Beverly MORGAN	\$141.85

HSP e-Claims

Inv Guarantor	Location Name	Site ID	Inv Count
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## Providing alternative evidence

Where a patient cannot complete the electronic signing, and you have enabled **Require Bulk Billing Consent**, you can confirm you have evidence of consent via editing the invoice; and marking *Consent to Bulk Bill Claim*

Medicare Online

Medical Provider

Dr Barbara HOFFMAN

Service Location

OP

Adelaide Rooms

DVA Treatment Location

Select from list

DVA Disability Text

☒ Consent to Bulk Bill Claim

## Revoking access to previously shared content

Available under **Patient > Shared Content**, technical support staff have access to revoke any previously shared content.

External person token was successfully deleted.

Has user account

Content shared by tokens (SMS, Email, QR code, or similar)

#### External person token

Expires At	Associated Model Type		Updated At	
13/05/2025 at 17:51 (+0930)	Invoice	<a href="#">Invoice 1099</a>	13/05/2025 at 15:51 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:52 (+0930)	Invoice	<a href="#">Invoice 1099</a>	13/05/2025 at 15:52 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:53 (+0930)	Receipt	<a href="#">Receipt 688</a>	13/05/2025 at 15:53 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:53 (+0930)	Receipt	<a href="#">Receipt 688</a>	13/05/2025 at 15:53 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:53 (+0930)	Receipt	<a href="#">Receipt 688</a>	13/05/2025 at 15:53 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:53 (+0930)	Receipt	<a href="#">Receipt 688</a>	13/05/2025 at 15:53 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:53 (+0930)	Request	<a href="#">Request 58</a>	13/05/2025 at 15:55 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:56 (+0930)	Request	<a href="#">Request 63</a>	13/05/2025 at 15:56 (+0930)	<a href="#">Delete</a>
13/05/2025 at 17:56 (+0930)	Request	<a href="#">Request 63</a>	13/05/2025 at 15:56 (+0930)	<a href="#">Delete</a>

## Online Enquiries

See [Online Enquiries and Expressions of Interest](#)

## Online Booking

See [Booking an Appointment online - Patient](#)

Optional message types allow online confirmation or cancellation of an unconfirmed appointment.

## Other considerations

See [Patient Portal - Reverse Proxy](#)