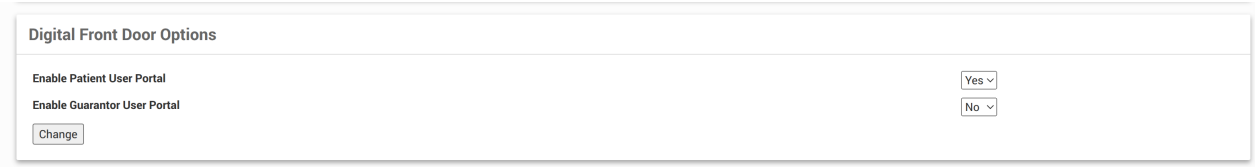
Patient Portal - Overview

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.**

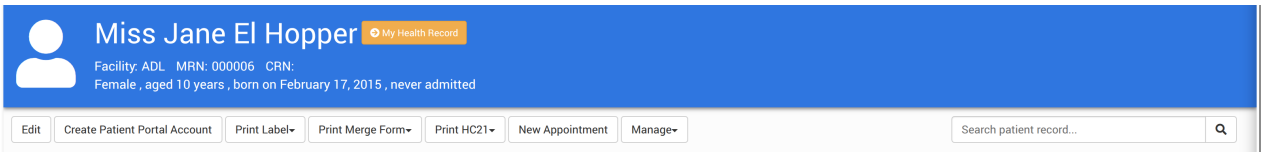


Patient Logins

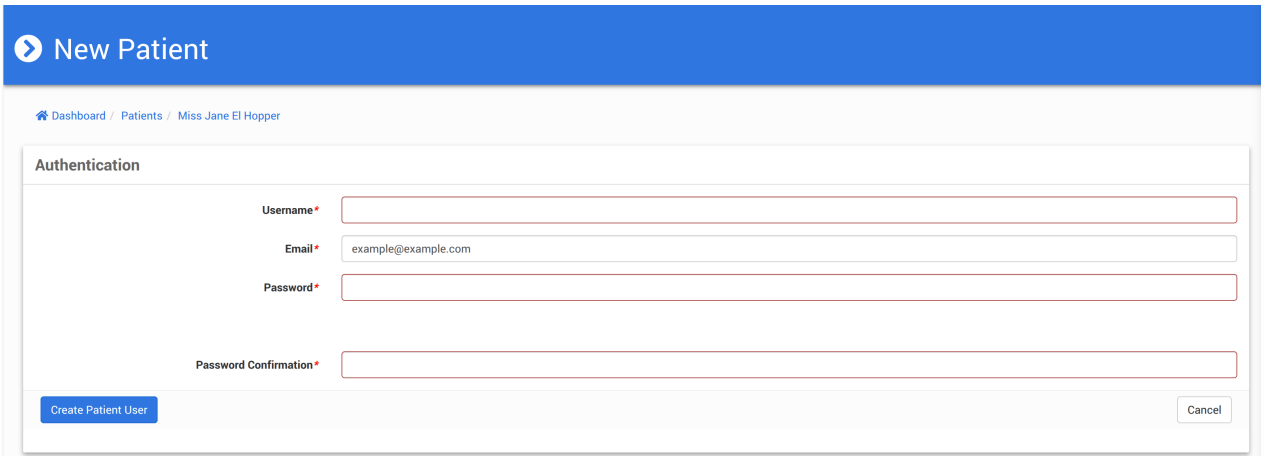
Active development: This functionality is subject to change, and is not currently available for all customers.

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.



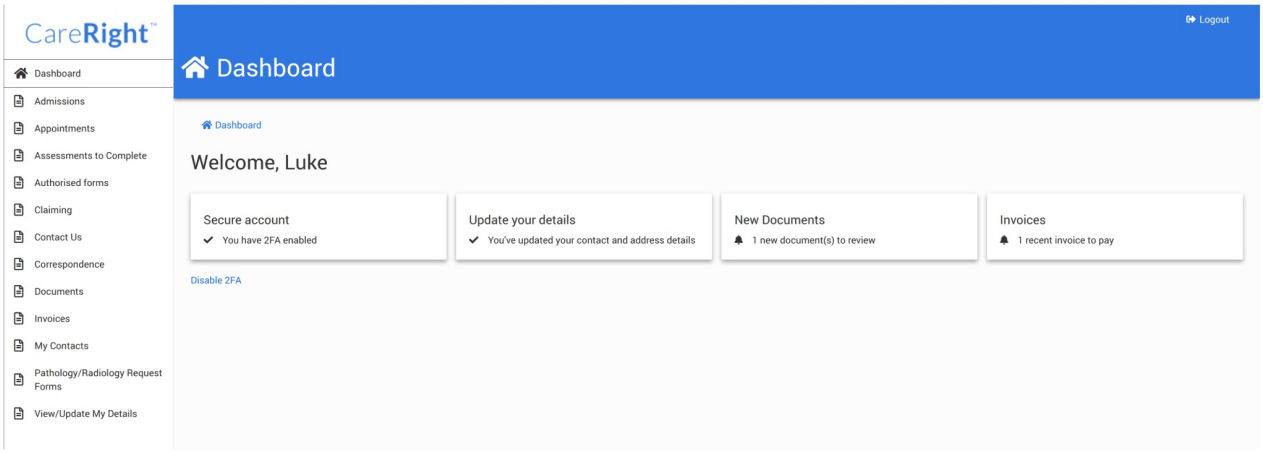
This enables a staff member to set up details:



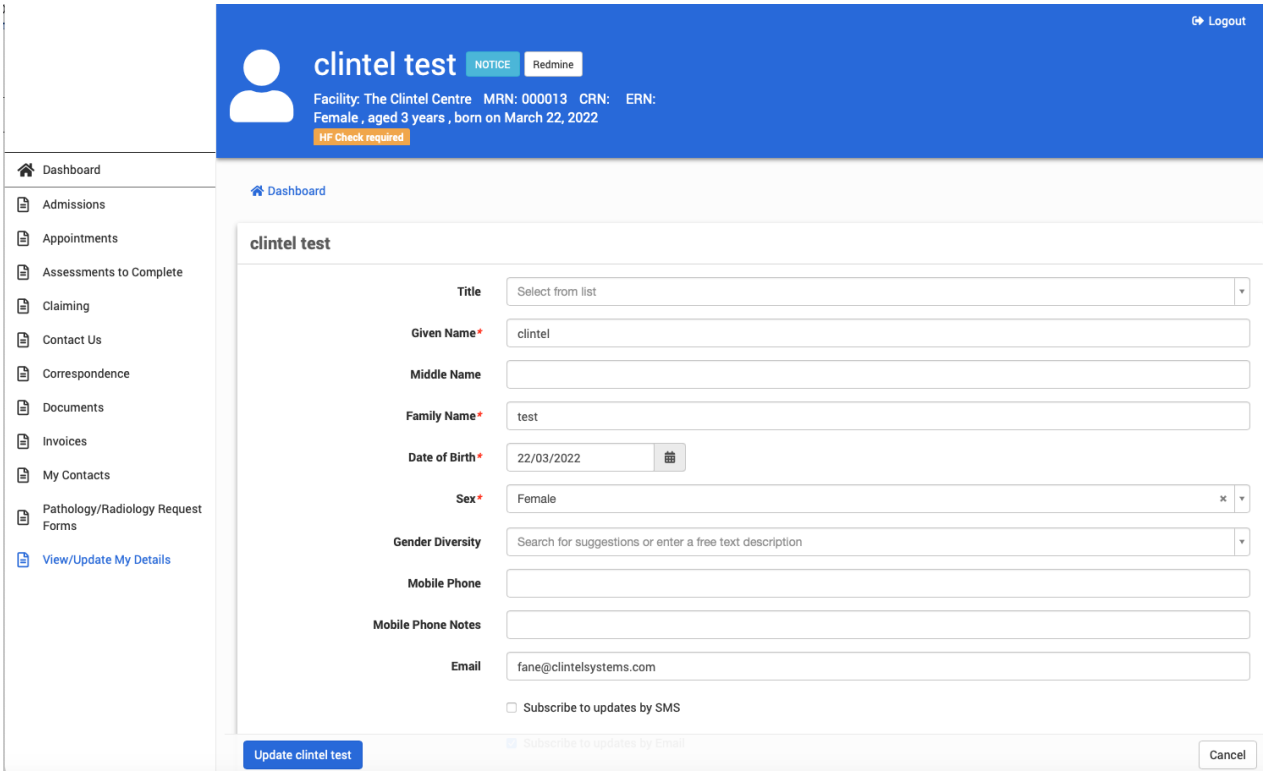
Ensure you communicate this securely with the patient, preferably in clinic.

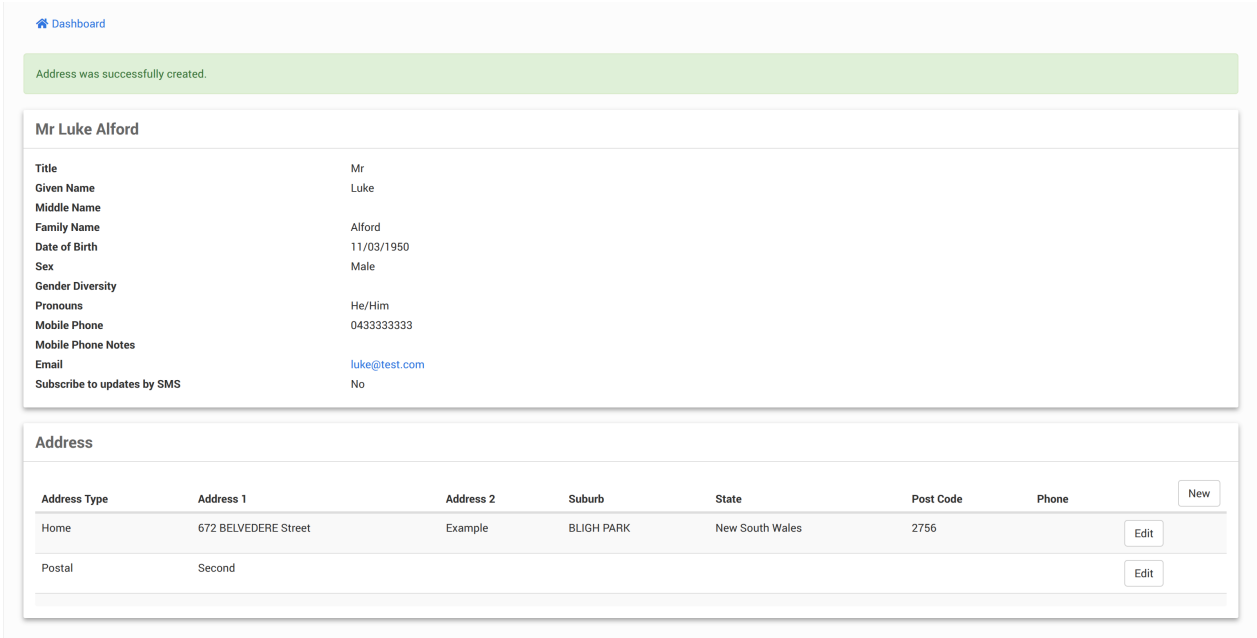
Patient Login

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).



Patients can access and update their core details.





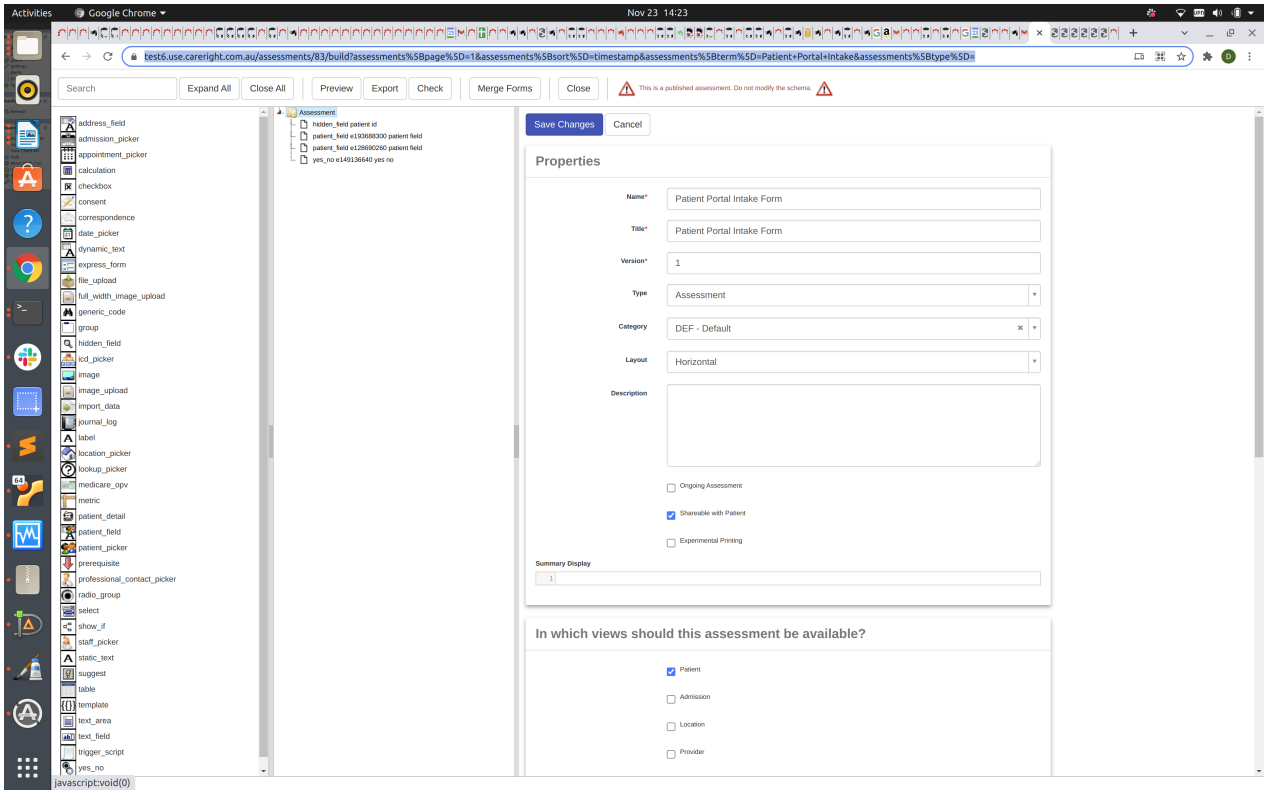
A number of features will be made available in coming releases, such as:

- 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.

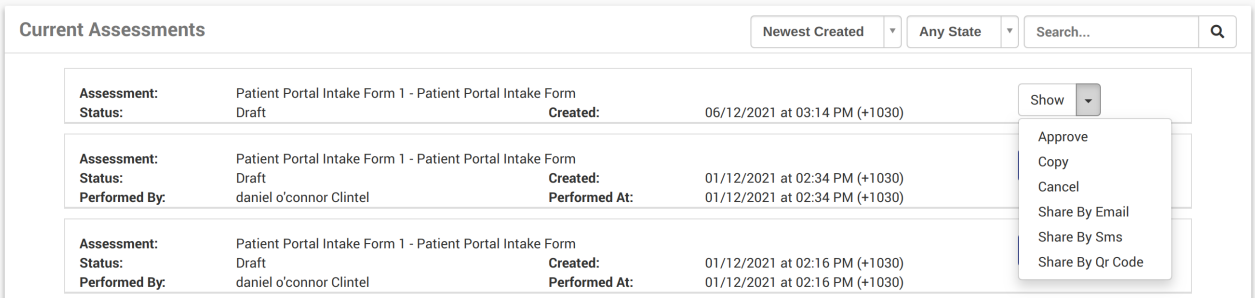


Patient Experience

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.

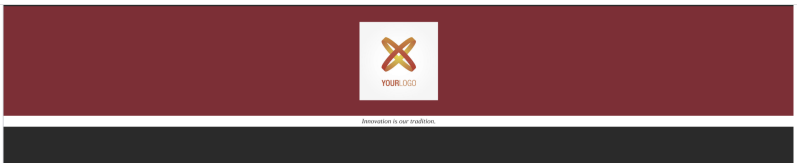


Example invitation email:

From Example Care Team <example@example.org.au>
Subject **[CareRight test6.use] Request: Patient Portal Intake Form - 1**
To daniel@clintelsystems.com

Show headers

HTML | Plain text | Source | MIME

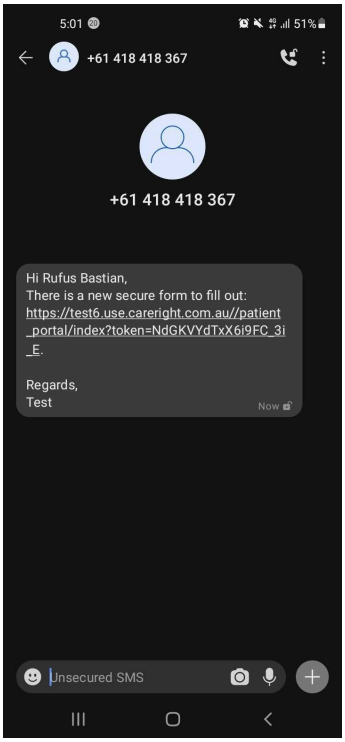


Hi Rufus Bastian,
There is a new secure form to fill out.

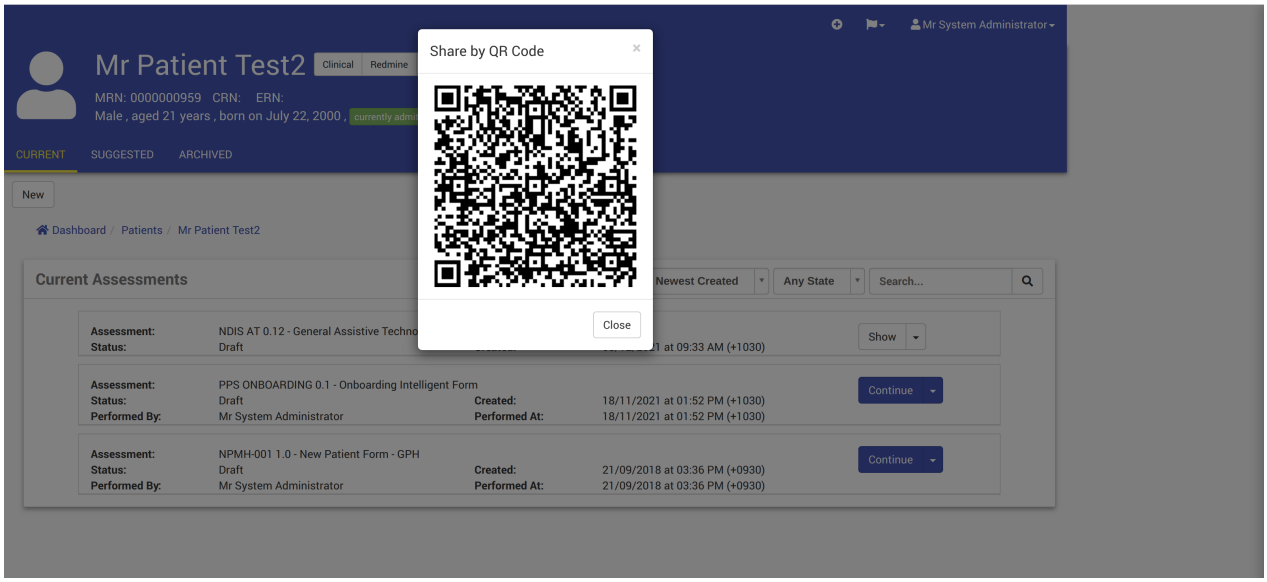
Regards,
Test

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

Example invitation SMS

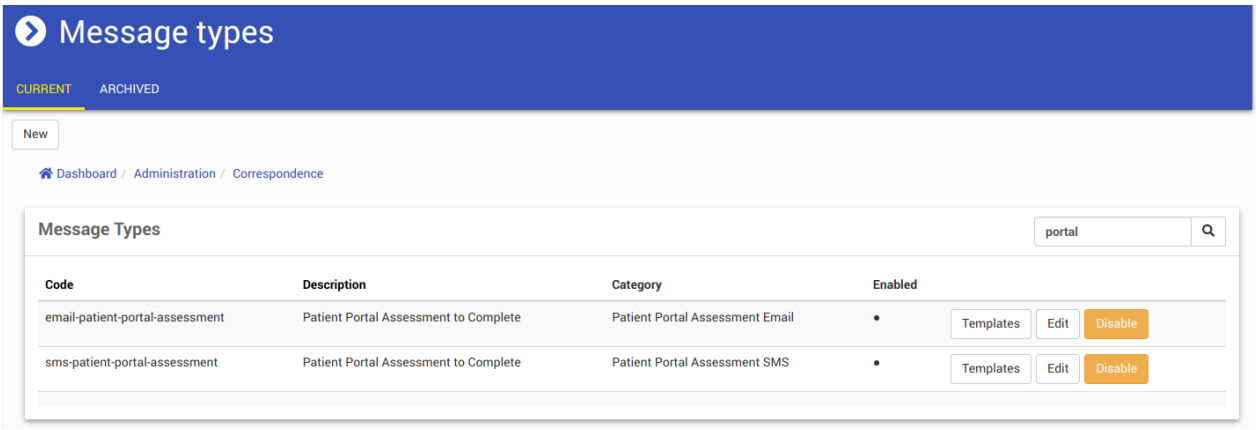


Example QR Code



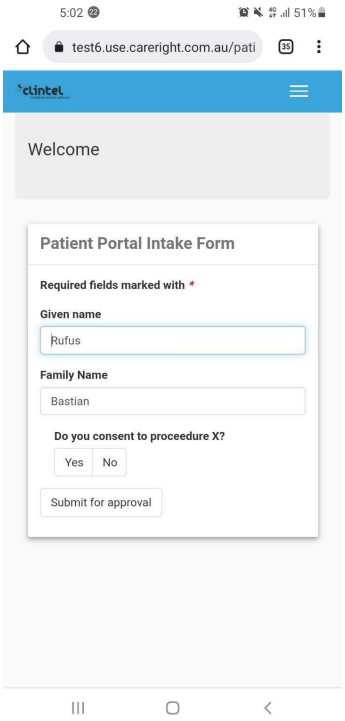
Many of these settings can be customised under **System Administration > Branding Settings**

Email Messages and SMS Messages can be customised.

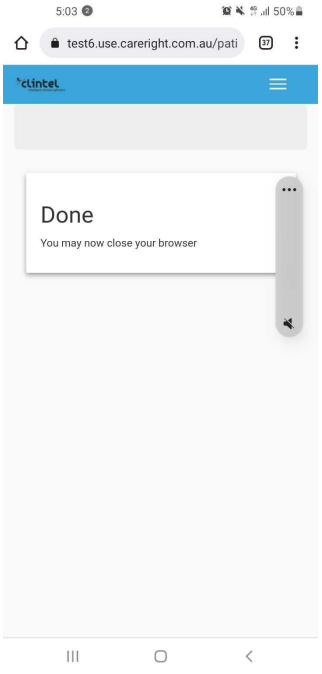


Mobile device experience

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



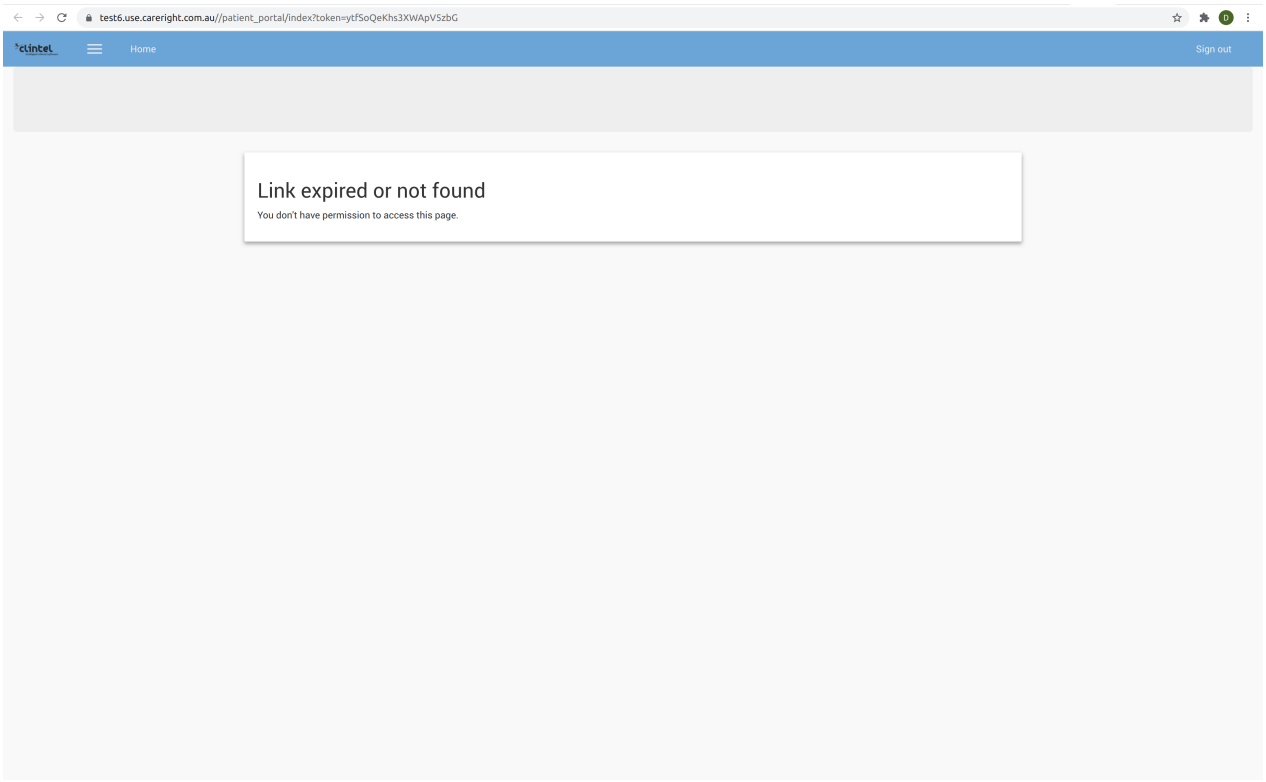
Once they have completed the process, the link they used is expired, and they are prompted to close the browser.



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**.

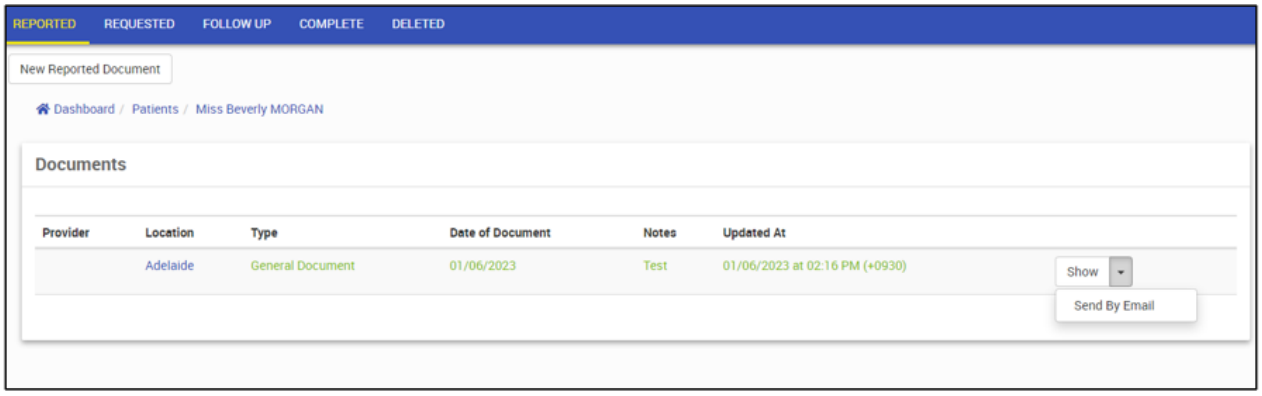
Sharing Documents

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

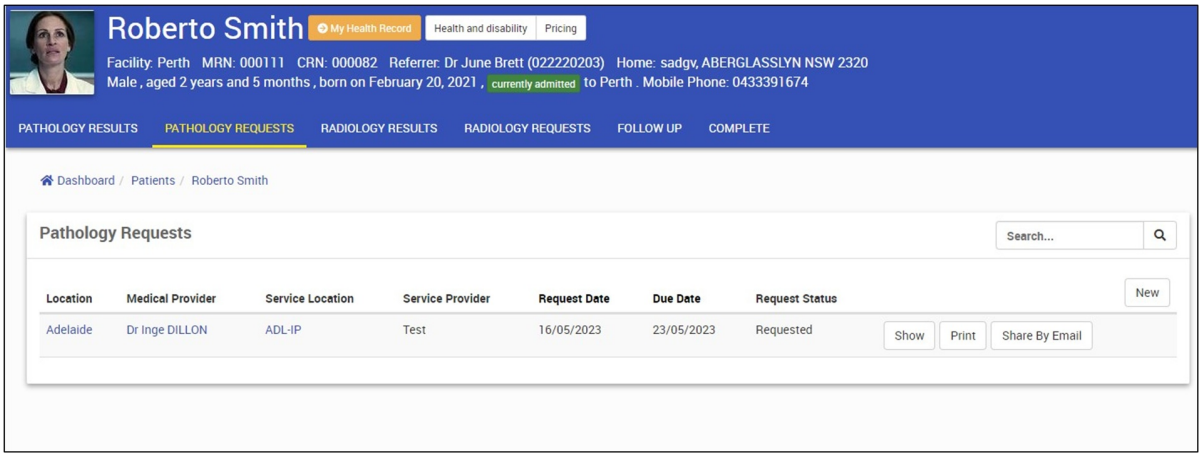


Sharing Pathology Request Forms, Results

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.

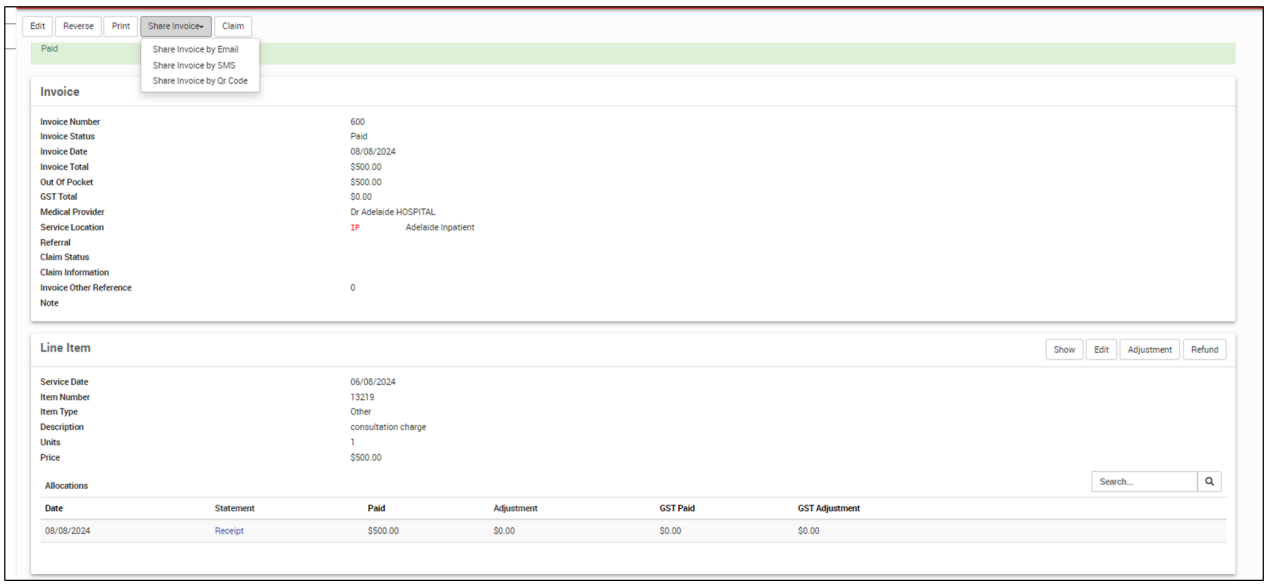
Sharing Invoices and Receipts

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.

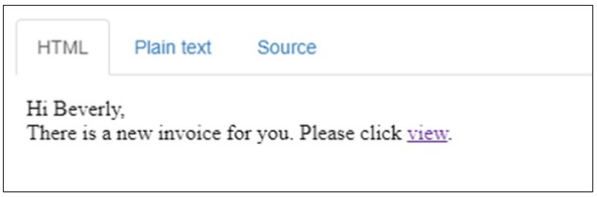
Prerequisites to share via SMS and Email:

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

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



Example:



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

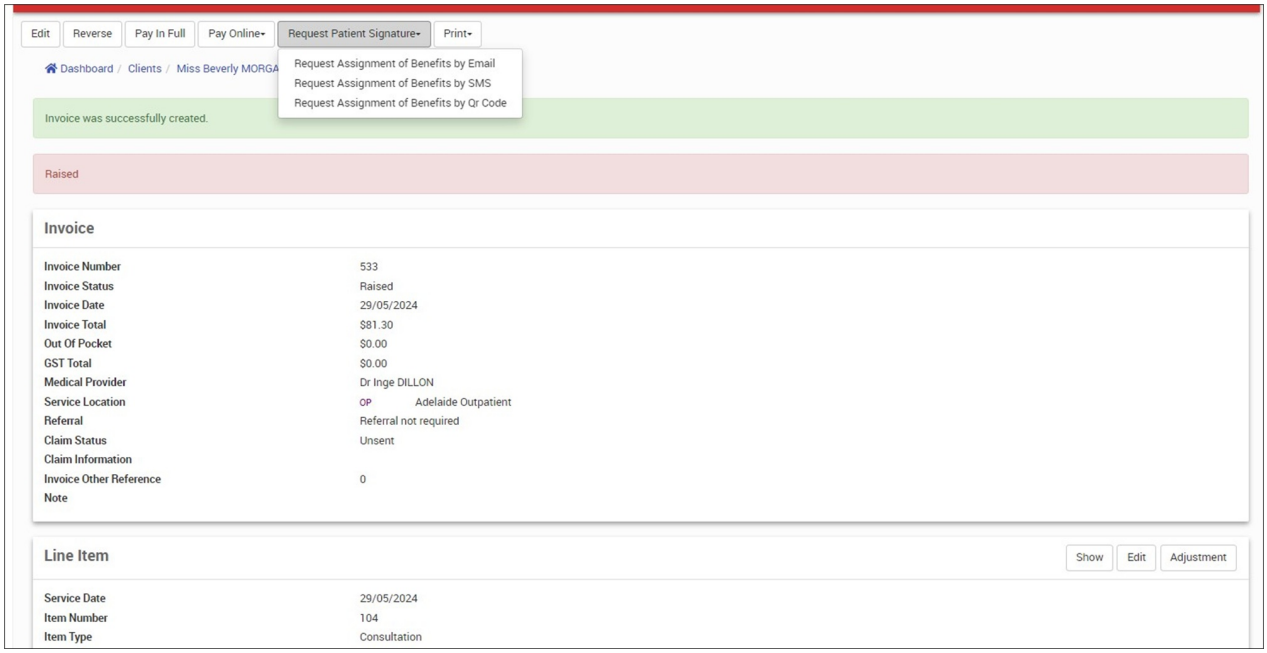
Obtaining Bulk Billing Consent

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.

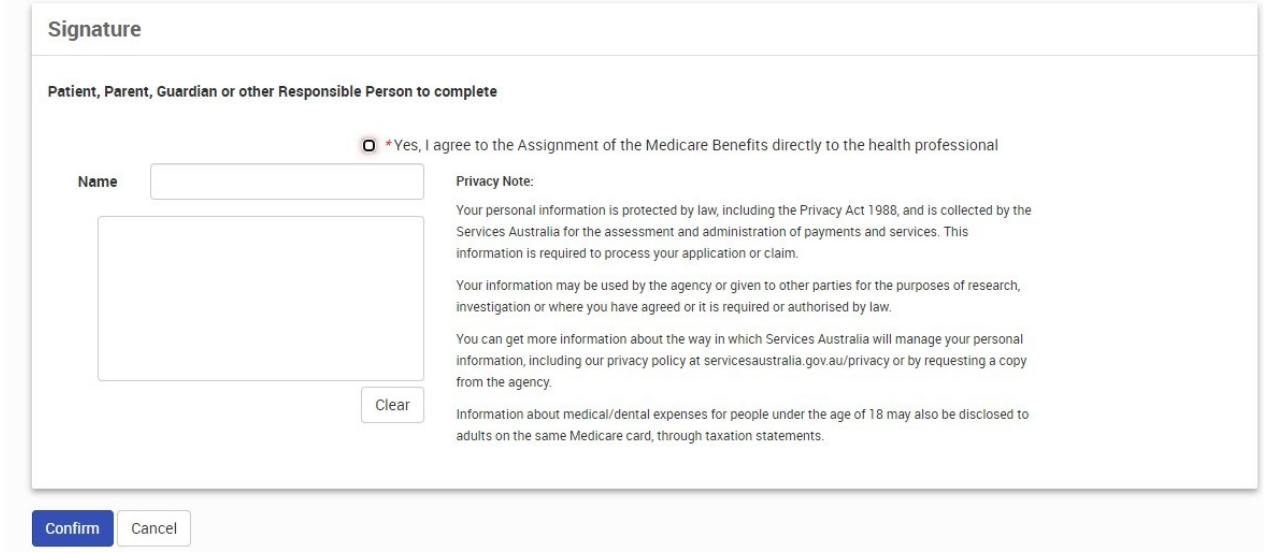


Once user shared the request for signature, patient will receive a notification. For example:

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:

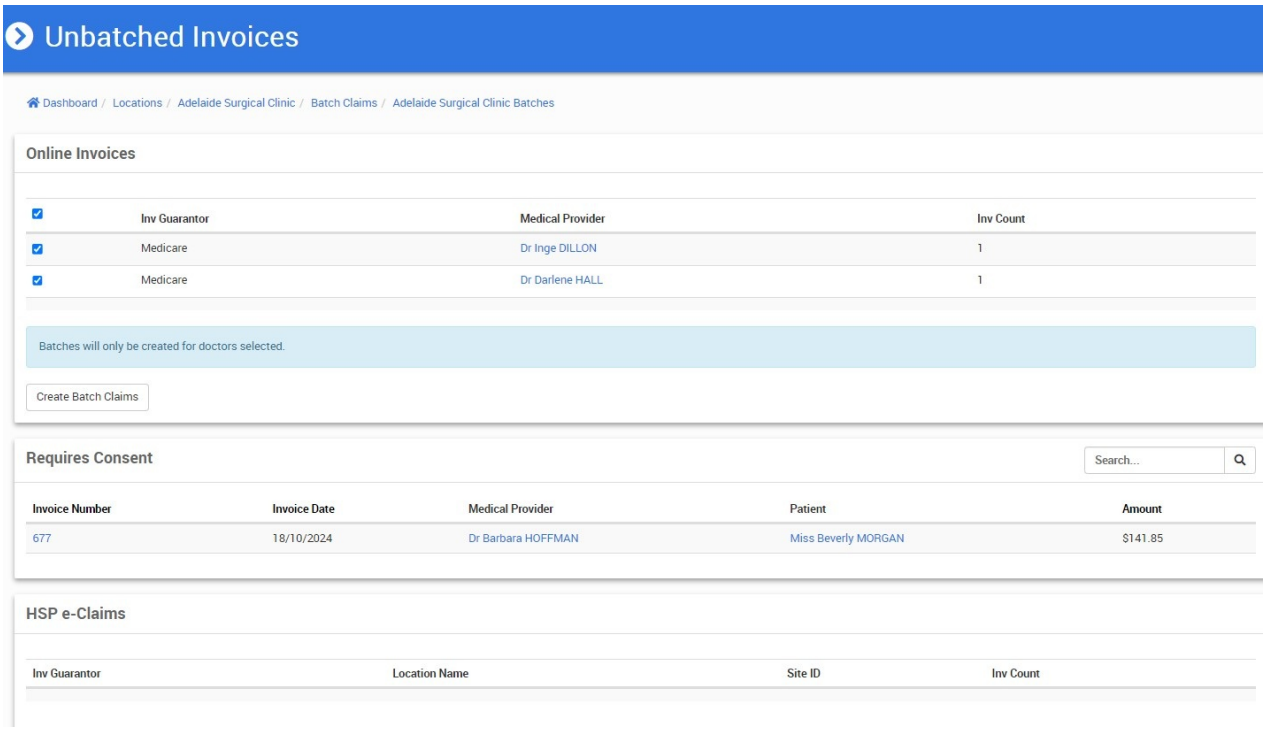


Patients may download a copy of the signed form for their reference.

System configuration: Require Bulk Billing Consent

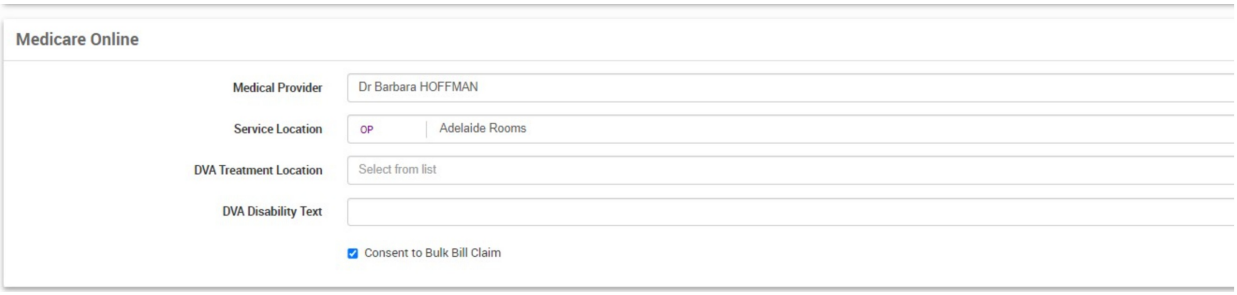
Refer to Configurations for Bulk Bill Claim for further general configuration.

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



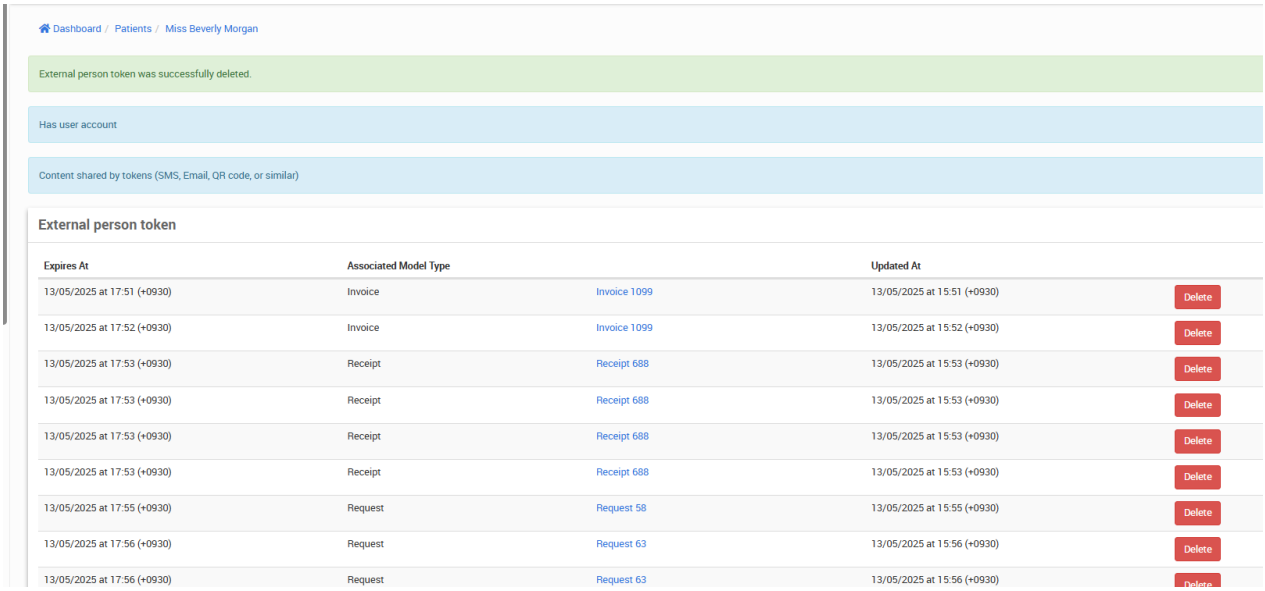
Providing alternative evidence

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*



Revoking access to previously shared content

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



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