Checklists
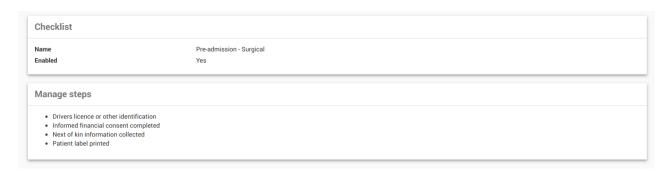
CareRight allows you to create a number of Checklists that you use in various processes. This feature is specifically designed for pre-admission and program enrolment.

System Administration

System Administration > Create a Checklist

As a system administrator, simple visit Administration > Checklists > New.

Checklist

Name	Pre-admission - Surgical
Enabled	Yes

Manage steps

- Drivers licence or other identification
- Informed financial consent completed
- Next of kin information collected
- Patient label printed

Add all relevant steps, enable your checklist and save.

Users and Groups > Permissions

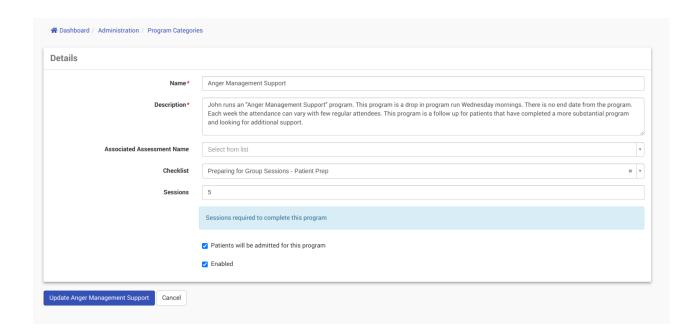You will need to grant for your users:

- checklist_viewer
- checklist_editor

Admission Categories > Associate a checklist

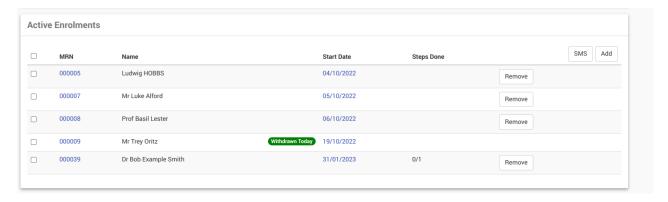Simply Add/Edit Admission Categories and specify the "Checklist" field

☑ Requires Medical Invoicing

☐ Exclude From Statutory Reporting

Checklist	Pre-admission - Surgical	✕ ▾

Program Categories > Associate a checklist

See Program Categories

Details

Name*	Anger Management Support
Description*	John runs an "Anger Management Support" program. This program is a drop in program run Wednesday mornings. There is no end date from the program. Each week the attendance can vary with few regular attendees. This program is a follow up for patients that have completed a more substantial program and looking for additional support.
Associated Assessment Name	Select from list ▼
Checklist	Preparing for Group Sessions - Patient Prep ✕ ▼
Sessions	5
	Sessions required to complete this program

☑ Patients will be admitted for this program
☑ Enabled

[Update Anger Management Support] [Cancel]

Staff usage

Program Enrolment > See checklist completion

Active Enrolments

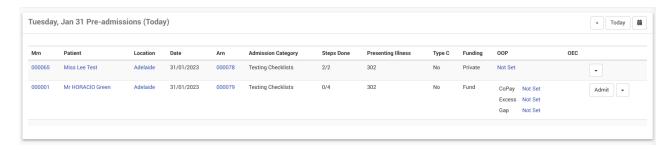| ☐	MRN	Name		Start Date	Steps Done			SMS	Add
☐	000005	Ludwig HOBBS		04/10/2022			Remove		
☐	000007	Mr Luke Alford		05/10/2022			Remove		
☐	000008	Prof Basil Lester		06/10/2022			Remove		
☐	000009	Mr Trey Oritz	Withdrawn Today	19/10/2022					
☐	000039	Dr Bob Example Smith		31/01/2023	0/1		Remove		

Program Enrolment > Edit Enrolment > Mark steps complete

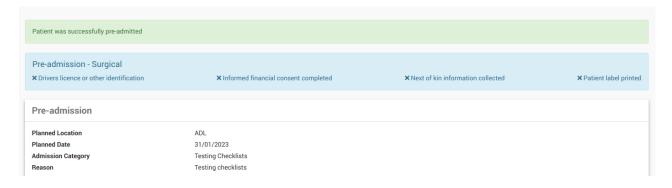Simply click on the date link to edit the enrolment details and mark steps complete.

Preparing for Group Sessions - Patient Prep

☐ **Bring your paperwork**

Program	Anger Management Support
Schedule	Angry Schedule
Patient	Dr Bob Smith
Start Date *	31/01/2023 📅

[Update Program Enrolment] [Cancel]

Pre-admissions > See progress

From the location or global view, simply access your Pre-admissions List

Tuesday, Jan 31 Pre-admissions (Today)   [<] [Today] [📅]

Mrn	Patient	Location	Date	Arn	Admission Category	Steps Done	Presenting Illness	Type C	Funding	OOP		OEC	
000065	Miss Lee Test	Adelaide	31/01/2023	000078	Testing Checklists	2/2	302	No	Private	Not Set			[▾]
000001	Mr HORACIO Green	Adelaide	31/01/2023	000079	Testing Checklists	0/4	302	No	Fund	CoPay	Not Set		[Admit] [▾]
										Excess	Not Set		
										Gap	Not Set		

Viewing an individual admission will allow you to see the steps completed and remaining.

Patient was successfully pre-admitted

Pre-admission - Surgical

| ✗ Drivers licence or other identification | ✗ Informed financial consent completed | ✗ Next of kin information collected | ✗ Patient label printed |

Pre-admission

Planned Location	ADL
Planned Date	31/01/2023
Admission Category	Testing Checklists
Reason	Testing checklists

To update the steps, if you have permission to do so, simply edit the admission:

Patient was successfully pre-admitted

Pre-admission - Surgical
☐ Drivers licence or other identification   ☑ Informed financial consent completed   ☐ Next of kin information collected   ☐ Patient label printed

Pre-admission

Planned Location*	Adelaide
Planned Date*	31/01/2023
Admission Category	Testing Checklists

Appointment types > checklist

❯ Appointment types

Duration (minutes)*	60
Sort Order	12
Background Colour	#db0f7e
Text Colour	#170808
Associated Assessment Name	Select from list
Cool Down Period (working days)	0
Checklist	Select from list

To update the checklist, patient appointment > edit > tick checklist > update the appointment.

👨‍⚕️ Dr Maryln JOY

[View Patient] [Edit Appointment] [New Correspondence] [Print Operation Report] [Edit Operation Report]

🏠 Dashboard / Appointments

checklists
✔ Guarantor verifications   ✘ NOK notify and consent taken   ✘ IDs Verifications   ✘ collect contact details

Appointment

Date	14/04/2025
Start Time	05:45 PM
Duration	45
Patient	Miss Beverly Morgan
Provider	Maryln JOY
Location	ADL
Room	
Session Name	test
Session Type Category	Consultation