Sharing an Assessment with patients

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CareRight features the ability for Patients to complete online assessments in a secure way. You may require system administration access to view some of the areas mentioned in this article.

Making an Assessment Sharable

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

Enable Client side validation

When you share an online assessment to a patient, Careright is now capable to do client side validation for *Medicare Number* and *DVA number.* To enable the patient side validation your system admin need to simply tick " *Enable client side validation (recommended)"* while creating the assessment.. Follow are the examples for Medicare and DVA validations respectively.

Share Form

Required fields marked with *

First Name: Lady

Second Name: Smith

DOB: 27/10/1980

Medicare Number:

Medicare IRN: 1

DVA Number: 1111

⚠ Please match the format requested.
A unique personal identifier issued to a veteran by the Department of Veterans' Affairs.

Patient Signature:

Clear

Confirm Signature

Upload document here
File Name:
Browse...

Submit for approval

Share an Assessment:

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.*

1. From the dashboard.

2. Search for a patient

3. Click show to a patient.

4. Click Assessment from left side menu.

5. Click on New.

6. Search for the relevant assessment.

7. Click on the dropdown arrow right to Perform.

8. Click Create Current Assessment

9. Again click on the Dropdown arrow right to Preform option.

10. Select the option to share the assessment.

New

🏠 Dashboard / Patients / Reny Smith

Current Assessments

| Newest Created ▾ | Any State ▾ | Search... 🔍 |

| Assessment: | Share Form 3 - Share Form | | | Perform ▾ |
| Status: | Draft | Created: | 11/10/2023 at 03:38 PM (+1030) | |

Copy
Cancel
Share By Email
Share By Sms
Share By Qr Code

Assessment:	NP-001 1.33 - New Patient Form HH		
Status:	Draft	Created:	04/08/2023 at 04:23 PM (+0930)
Performed By:	Clintel sarah Clintel	Performed At:	04/08/2023 at 04:23 PM (+0930)

Sharing via Email

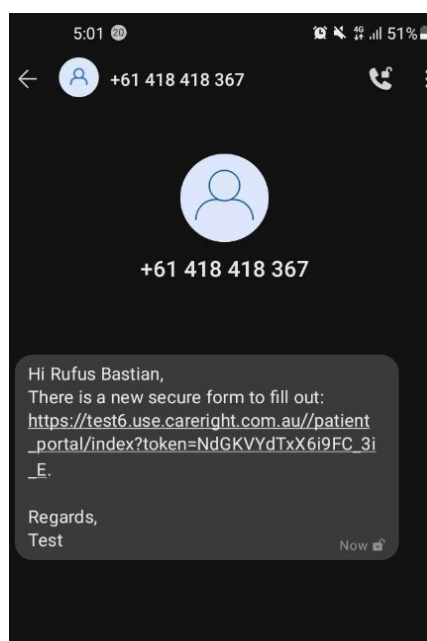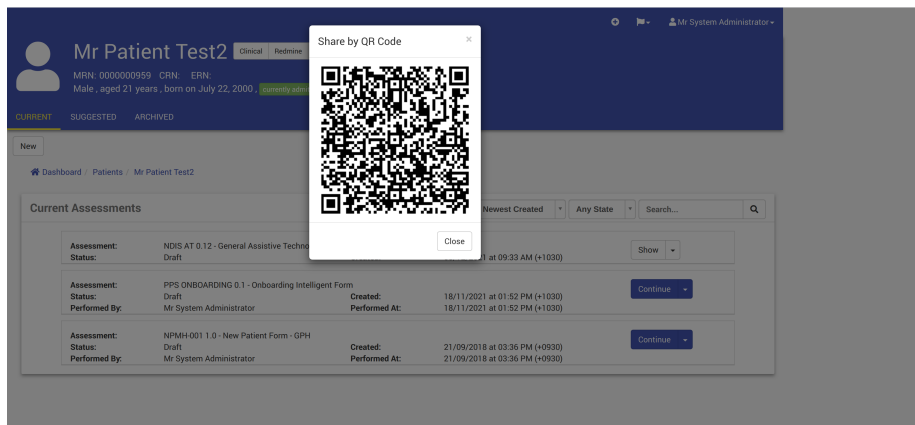| From | Example Care Team <example@example.org.au> | Show headers ▾ |
| Subject | [CareRight test6.use] Request: Patient Portal Intake Form - 1 | |
| To | daniel@clintelsystems.com | |

HTML   Plain text   Source   MIME

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 13496

Sharing via SMS

5:01

+61 418 418 367

+61 418 418 367

Hi Rufus Bastian,
There is a new secure form to fill out:
https://test6.use.careright.com.au//patient
_portal/index?token=NdGKVYdTxX6i9FC_3i
_E.

Regards,
Test   Now

Sharing via QR Code:

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.

Accessing the completed assessment

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

Assessment *Submitted for approval can be viewed under:*

From Patient record:

1. From Dashboard.

2. search a patient.

3. Click show.

4. Click on the assessment menu.

From Global view: (<mark>*This is available from version 6.95*</mark>**)**

1. From Dashboard.

2. Click on the correspondence menu.

3. Click on the assessment tab.

If adjustments are needed in the assessment form after a patient has submitted for approval, users with assessment approver permission can make edits by clicking the "continue" button.

Expired links

Links default to a 1 hour expiry, which can be changed by system admin 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.