

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.

The screenshot shows the 'Create Assessment' form in the CareRight system. The left sidebar contains a list of field types: address_field, admission_picker, appointment_picker, calculation, cell, checkbox, clinical_notes_history, consent, correspondence, dssa_client_episode_number, date_picker, dynamic_text, express_form, file_upload, full_width_image_upload, generic_code, grid, group, guarantor_picker, hidden_field, iot_picker, image, image_upload, and import_data. The main form area is titled 'Patient Form' and includes fields for Name, Title, Version (set to 1), Type (Assessment), Category (Select from list), and Layout (Horizontal). The Description field is empty. Below these fields are three checkboxes: 'Ongoing Assessment' (checked), 'Sharable with Patient' (unchecked), and 'Enable client side validation (recommended)' (unchecked). The 'Enable modern printing' checkbox is checked. A 'Summary Display' section at the bottom shows a small preview of the form.

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.

The screenshot shows the 'Share Form' patient interface. It includes fields for 'First Name' (Lady), 'Second Name' (Smith), 'DOB' (27/10/1980), 'Medicare Number' (11111), 'Medicare IRN' (1), and 'DVA Number' (1111). The 'Medicare Number' and 'DVA Number' fields are highlighted with red borders, indicating validation errors. A tooltip message states: 'Please match the format requested. A valid Medicare Number. This is the 10 digit card number, no spaces'. The 'Patient Signature' section has a large text area and a 'Clear' button. Below it are 'Confirm Signature' and 'Upload document here' buttons. A 'File Name:' field with a 'Browse...' button is also present. At the bottom left is a 'Submit for approval' button.

Share Form

Required fields marked with *

First Name: Lady

Second Name: Smith

DOB: 27/10/1980

Medicare Number:

Medicare IRN: 1

DVA Number: 1111

Patient Signature:

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

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.

CURRENT

SUGGESTED

ARCHIVED

New

Dashboard / Patients / Reny Smith

Current Assessments

Newest Created

Any State

Search...

Assessment:	Share Form 3 - Share Form	Created:	11/10/2023 at 03:38 PM (+1030)	Perform
Status:	Draft			
Assessment:	NP-001 1.33 - New Patient Form HH	Created:	04/08/2023 at 04:23 PM (+0930)	
Status:	Draft	Performed At:	04/08/2023 at 04:23 PM (+0930)	
Performed By:	Clintel sarah Clintel			

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

Sharing via 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

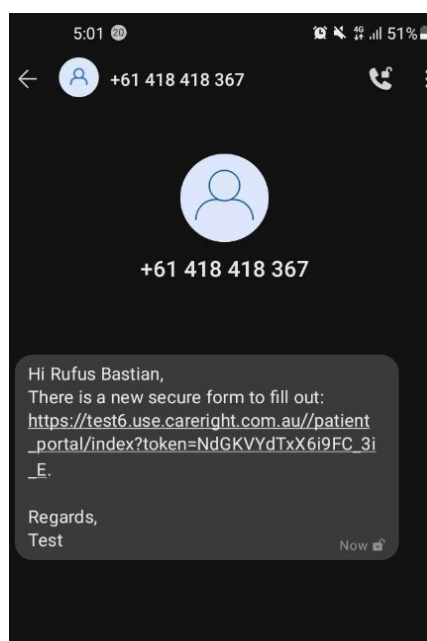
MIME



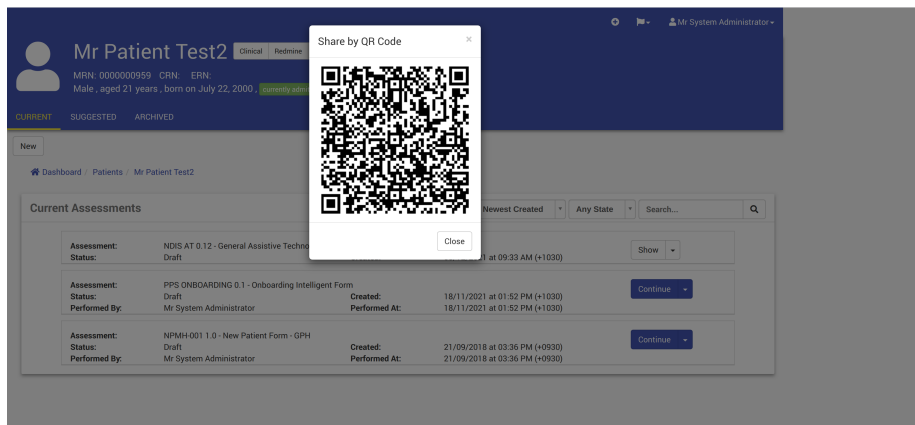
Hi Rufus Bastian,
There is a [new secure form](#) to fill out.
Regards,
Test
123 Example Rd
Signatretown, NSW, 2000
Ph: 1800 000 000



Sharing via SMS



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.

A screenshot of a mobile device screen displaying the 'Patient Portal Intake Form'. The form is titled 'Patient Portal Intake Form' and includes a 'Welcome' message at the top. Below the title, a note states 'Required fields marked with *'. The form contains two text input fields: 'Given name' with the value 'Rufus' and 'Family Name' with the value 'Bastian'. Below these fields is a section titled 'Do you consent to procedure X?' with two radio buttons, 'Yes' and 'No', both of which are unselected. At the bottom of the form is a 'Submit for approval' button.

Done

You may now close your 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: **(This is available from version 6.95)**

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.

