Online Enquiries and Expressions of Interest

CareRight features an Enquiry Management System for recording general, non clinical expressions of interest from potential patients.

As of CareRight 6.93, this enquiry system now features an Online capability, to directly integrate with your website, as well as the ability to define enquiry categories.

Use cases

Similar to Online Booking, this functionality allows members of the general public to engage with your organisation.

You may wish to use this functionality for:

- Guided pathways for new patients about particular procedures, inclusive screening questions
- Referrals from other organisations, inclusive uploading supporting documentation
- A pathway into the waitlist, where pre-appointment processes are required.
- Initial symptom checker filtering

Online Enquiries - Setup
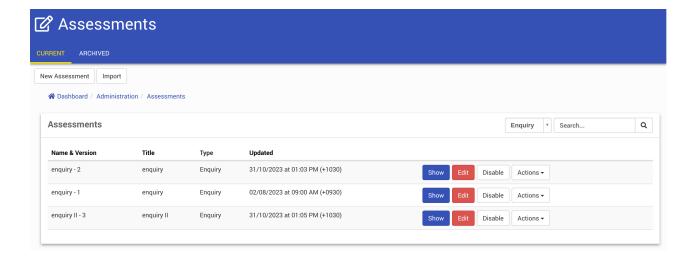
Enquiry Categories

Configurable via **Admin > Correspondence > Enquiry Categories** Simply create one or more enquiry categories, and if there are specific additional questions or information to gather; an **Enquiry Assessment** can be associated.

Enquiry Category	
Name*	Tympanoplasty Enquiry
Associated Assessment Name	enquiry II ✕ ▾

[Update Enquiry category] [Cancel]

Enquiry Assessments

This functionality is powered by the Smart Forms (Assessments) system.

Simply ensure the assessment you design is marked with the type **Enquiry**.
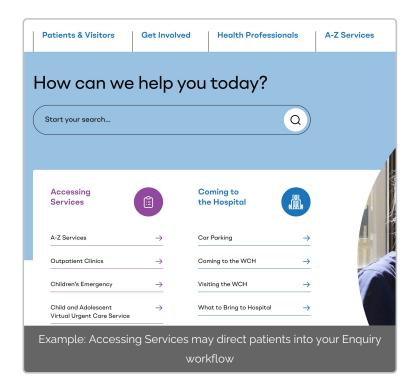
✎ Assessments

New Assessment   Import

🏠 Dashboard / Administration / Assessments

Assessments

Enquiry ▾   Search... 🔍

Name & Version	Title	Type	Updated				
enquiry - 2	enquiry	Enquiry	31/10/2023 at 01:03 PM (+1030)	Show	Edit	Disable	Actions ▾
enquiry - 1	enquiry	Enquiry	02/08/2023 at 09:00 AM (+0930)	Show	Edit	Disable	Actions ▾
enquiry II - 3	enquiry II	Enquiry	31/10/2023 at 01:05 PM (+1030)	Show	Edit	Disable	Actions ▾

Links

Visitors to your public facing site can simply follow a link, with a pre-filled Enquiry form available.

The URL format is:

/patient_portal/enquiries/new?location_id=2&enquiry_category_id=1

Each enquiry category can be preconfigured with its own unique link.

| Patients & Visitors | Get Involved | Health Professionals | A-Z Services |

How can we help you today?

Start your search...   🔍

Accessing Services 📋

A-Z Services →

Outpatient Clinics →

Children's Emergency →

Child and Adolescent Virtual Urgent Care Service →

Coming to the Hospital 🏥

Car Parking →

Coming to the WCH →

Visiting the WCH →

What to Bring to Hospital →

Example: Accessing Services may direct patients into your Enquiry workflow
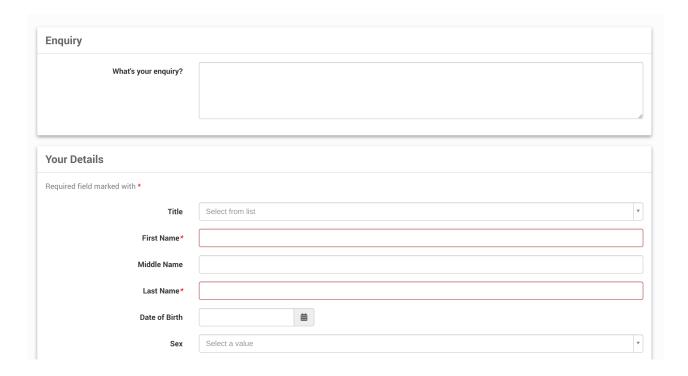
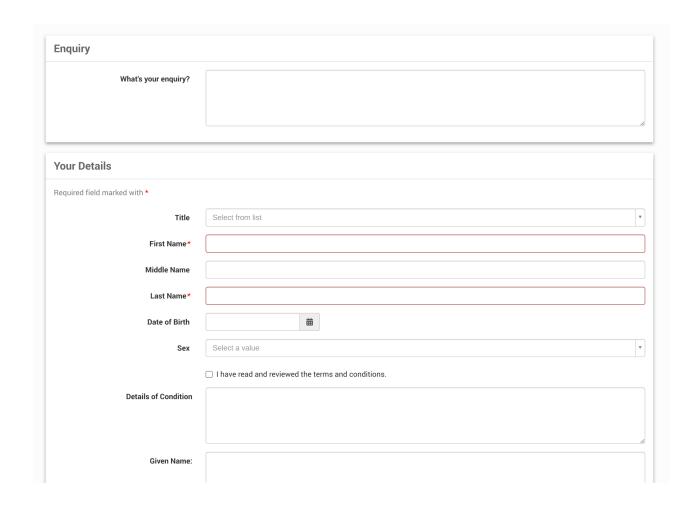## Online Enquiries - User Experience

When a member of the public follows a link from your website, they will be presented with some minimal data capture.

This consists of:

- Enquiry text

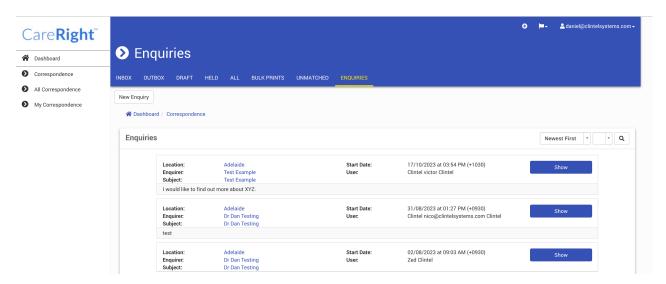- Name and other details

- Core contact details

Enquiry

What's your enquiry?	

Your Details

Required field marked with *

Title	Select from list ▼
First Name*	
Middle Name	
Last Name*	
Date of Birth	📅
Sex	Select a value ▼

If you have defined a specific assessment for the enquiry category selected, additional fields are rendered below:

Managing Enquiries - Staff Experience

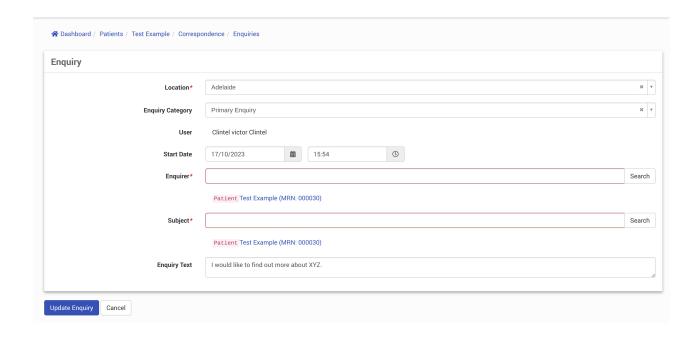Main articles: Enquiries - Overview, View Most Recent Enquiries.

Available via **Correspondence > Enquiries,** new enquiries appear in the list.

You can either:

- View the Enquiry and associated assessment.

- Edit the Enquiry to link it to an Existing Patient.

- Or convert the Contact into a New Patient.

Enquiry

Location*	Adelaide
Enquiry Category	Primary Enquiry
User	Clintel victor Clintel
Start Date	17/10/2023 15:54
Enquirer*	Search
	Patient Test Example (MRN: 000030)
Subject*	Search
	Patient Test Example (MRN: 000030)
Enquiry Text	I would like to find out more about XYZ.

Update Enquiry   Cancel

Going Further

Automations

As the Enquiry system is powered by the Smart Forms (Assessments) functionality, an workflow automations you wish to trigger can begin at this stage. For example, creating a *Task* for Administrative staff when an Enquiry of the type *Professional Referral* is submitted.

Integrations with CRMs, SalesForce, HubSpot and similar

Via the Dataset Reports functionality, a customised export of your Contacts and Enquiries can be created, with full detail of consent to contact, contact details, and enquiry categories.

Main article: Uploading data to 3rd party systems (csv export)