

# Karo Risk Assessment Tool Instructions

## 1. Request a random sample from Karo Data Management

Contact Patricia ([patricia@karo.co.nz](mailto:patricia@karo.co.nz)) to request a randomly generated list of patients for the practice that you intend to audit. The list will be sent to you as an Excel spreadsheet. The list contains the details you need to find the patient at the practice, each patient has an audit ID it is important that you keep this ID as you need it to enter the information about the patient's enrolment in the online tool. You will be given a login to the online tool at this stage.

## 2. Request the practice to locate the enrolment forms

Send the list to the practice and request that the practice locate the enrolment forms for each patient on the list . preferably the original paper form, otherwise use a print out of the scanned form.

## 3. Log on to the online tool and complete the data entry screen for the patient using the information on the enrolment form

3.1. Go to <http://www.karodata.co.nz/audit/AuditLogIn.html>

Enter your details to log in to the tool and then select the %Enter Enrolment Form Details+from the options

3.2. The following screen will appear:

The screenshot shows a web form titled "Enter Enrolment Form Details" with a green header bar. The form contains the following fields and controls:

- Patient Risk Assessment ID: A dropdown menu.
- Patient Eligible: A checkbox.
- Form Seen: A checkbox.
- Paper Form Seen: A checkbox.
- Form has unusual edits: A checkbox.
- Form Signed By: A dropdown menu.
- Date Form Signed: A text input field.
- DOB: A text input field.
- Form Gender: A dropdown menu.
- Form Ethnicity: A dropdown menu, followed by two additional dropdown menus.
- Date Last Visit: A text input field.
- Risk Assessment Complete: A checkbox.
- Buttons: "Save" and "Cancel".

- 3.3. Select the Audit ID from the drop down list
- 3.4. First of all you need to make sure the patient is eligible to be enrolled in a PHO. Things to check for are that they are a New Zealand citizen, or meet the eligibility criteria for non NZ citizens, that they live in NZ and that they are not in prison.
- 3.5. If you have seen a form (paper or scanned) then tick the box and continue, if you haven't seen the form then do not tick the box and go to Risk Assessment Complete and tick the box and then click on Save
- 3.6. If the practice has retained a paper copy of the form and is able to find it on request then tick the box (if they know where it is but you haven't actually seen it then continue)
- 3.7. Look at the form and check to see if there have been any subsequent entries on the form. E.g. different handwriting styles or coloured pens used on the same form. This will alert to possible changes made by admin staff on the forms which Audit and Compliance will question. If anything looks odd then tick Unusual Edits otherwise leave unticked.
- 3.8. Check to see who signed the form and make the appropriate selection
- 3.9. Enter the date the form was signed . if this date was printed on the form rather than completed by the patient then advise the practice that this is not acceptable practice. Continue with the rest of the data entry.
- 3.10. Continue to complete the rest of the data entry form based on what was completed on the enrolment form down to Date Last Visit.
- 3.11. Look at the PMS (Practice Management System) to identify the date of the last clinical contact (not the last invoice) and enter that into the data entry form.
- 3.12. Click on Save and then continue with the next patient

#### **4. View the reports**

Once you have completed the data entry then return to the options page to run the reports for the practice.