Run a New Assessment

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1. Search for a Patient record.
2. Select **Assessments** from the Menu.
    a. The Assessments screen will display.
3. Select the **New** button.
    a. The New Assessment screen will display.
4. From the **Assessment** field, click the down arrow. A list of your organisations assessments will appear.
5. Choose your relevant assessment.
6. Select the **Perform** button. The selected assessment template will display.

From here, you can complete the assessment (forms) and either:

- Click **Approve**, to finish the assessment (forms); or,
- **Save** and **Continue** later to keep the assessment (forms) in draft format to edit at a later stage.

Date and Time of approval will be recorded and users will be prompted when approval, cancellation, copy, archive and archiving actions are successful.

Assessments Screens

Provider-specific Interface

View for a specific patient to see and manage assessments.

See Provider Assessments List

Location-specific Interface

View for a specific patient to see and manage assessments.

See Location Assessments List

Patient-specific Interface

View for a specific patient to see and manage assessments.

See Patient Assessments List

Online Enquiries

When patients have made an online enquiry, the associated assessments can be found via

- Correspondence Tab - ENQUIRY
- Patient Assessments List (when a patient has been matched)

Online Appointments

When patients have made an online appointment, the associated assessments can be found via

- Correspondence Tabs
- Patient Assessments List (when a patient has been matched)

Workflow and other assessments

Main article: Workflows Overview