# Smart Forms (Assessments) Overview

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## CareRight Assessments

CareRight has assessment templates and forms are created by your System Administrator and can mirror your required business process practice (i.e. new client form, an initial assessment, a medical or clinical assessment, surveys etc). The assessments available will depend on the types of templates and forms that your organisation uses.

Main article: Run a New Assessment

### Performing a New Assessment

Main article: Run a New Assessment

1. Search for the 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.

### Accessing Existing Assessments

1. Search for the Patient record.
2. Select **Assessments** from the Menu.
    a. The Assessments screen will display.
3. It will display all the existing Assessments. From this screen, you can do the following actions:
    a. View an existing assessment.
    b. Open a new assessment form.
    c. Continue editing an assessment.
    d. Copy an assessment.

### Printing an Assessment

Main article: Printing Assessments (Forms)

1. You will only be able to print assessments which have been approved.
2. Search for the Patient record.
3. Select **Assessments** from the Menu.

    a. The Assessments screen will display.

4. Search for the relevant assessment and select the **Show** button.
    a. The Assessment will display.
5. Select the **Print** button at the top of the page and the report will generate.
    a. A PDF document will display and you can print the document from the screen to your local printer.

## Setting Up Assessment Templates and Forms

This can be done by your System Administrator or by Clintel. These are built in the Administration module of CareRight.

## **Assessments linked to Workflow**

Once an Assessment is built it can be triggered in CareRight as part of your business process flow. For Examples: New Patient. You can enter minimal data for a New Patient into CareRight when booking an Appointment and it will trigger a New Patient Assessment form to be generated. Once the patient has attended their appointment and filled in your paper registration form, you can assess the Patients New Patient Assessment and complete it based on the values in the paper from.

This can also be set up by your System Administrator or Clintel.