

# Assessment Printing

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

CareRight enables users to print assessments. The system administrator can configure or define how assessment printing should be printed and what content should appear on the assessment printout.

There are two ways to print assessments, which are useful in different scenarios. The factors depend on how much control you want over the layout, and whether any large text entry fields are present.

1. Printing assessment merge form.
2. System default printing.

## Overview of Assessment Merge Forms

These are PDF templates. These need to be created in an external program capable of creating or editing a PDF with embedded forms.

Specific forms elements will be replaced at time of printing with fields from the assessment. This mapping is description in [Merge Forms](#).

Incorrect mapping of the fields in between assessment and merge form will cause print errors in the system. Example:

```
Print error(s)

'EA.Comments Requests 2' Error - Invalid attribute: 'EA.Comments Requests 2' on model Patient
'AQ2.Medical Transfer Request Form Signature' Error - Invalid attribute: 'AQ2.Medical Transfer Request Form Signature' on model Patient
'Declaration' Error - Invalid attribute: 'Declaration' on model Patient
'AP6.COVID 19 Screen Signature' Error - Invalid attribute: 'AP6.COVID 19 Screen Signature' on model Patient
'assessment[su]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[fn]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[da]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[age]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[hp]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ema]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[wp]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[pdo_af_date]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[lo]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[sd]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ecp]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ect]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[pww]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[pup]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ttp]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[mn]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[rn]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[patient_id]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[mp]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[age1]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ht]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[wt]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[nil]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[alle]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[nill]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[nb]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ha]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[st]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ppm]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[ae]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[cs]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[osa]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[dia]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[kd]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[id]' Error - Invalid attribute: 'assessment' on model Patient
'assessment[bc]' Error - Invalid attribute: 'assessment' on model Patient
```

Advantages:

- Allows exact positioning of fields and layout.
- Allows control over look and feel, custom banners, images, etc.

Disadvantages:

- Fixed position fields mean large text answers will not fit in a box that is too small, or you may need to have

- Rich text fields will not be displayed correctly

## 1. Printing with PDF Templates (Merge Forms)

### Print when One PDF Template is Defined:

If an assessment only has one PDF template defined with "Enable for default printing", then the assessment screen will have a single **Print** button. When the **Print** button is selected, the fields of the assessment will be merged to the PDF template and the result returned to the user respecting the global "Embed Printed Assessments" option.

1. Perform an assessment.
2. Approve an assessment.
3. Click show.
4. Click on the Print option underneath patient banner.

### Print When Multiple PDF Templates are Defined:

If the user has defined multiple PDF templates with "Enable for default printing" enabled, then clicking Print will display a drop-down list of print options. When one of the PDF template names is selected, then the assessment fields will be merged into the PDF template and the result returned to the user respecting the global "Embed Printed Assessments" option.

1. Perform an assessment.
2. Approve an assessment.
3. Click show.
4. Click on the Print option underneath patient banner.
5. Select the relevant Template from drop down.

## 2. System Default Printing

When no PDF templates/Merge form are available for an assessment, a completed assessment is printed based on how the assessment appears in a web browser.

Advantages:

- Large text fields will be flow correctly, have no limit but only use as much space as they need
- Rich text fields will print correctly

Disadvantages:

- No control over style, or contents of the patient banner. The printed version will be similar to what is displayed on screen in the web browser.

## Assessment Printing Configuration

The header and footer for non-PDF printing can be configured globally for all assessments.

1. Click **Administration**.
2. Select **Global Settings** menu item.
  - a. The Global Settings screen will display.
3. Scroll down to the Assessment Printing Options Section.
4. There are three subsections to be updated:
  - a. General Options

Display User Format	<input type="checkbox"/> Log in Name <input type="checkbox"/> Staff Member Name
Display User Staff member Type	<input type="checkbox"/> No <input type="checkbox"/> Yes - Description <input type="checkbox"/> Yes - Code
Display Patient Banner	<input type="checkbox"/> Yes <input type="checkbox"/> No

b. Header Options

Assessment Title	<input type="checkbox"/> Yes <input type="checkbox"/> No
Author	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approver	<input type="checkbox"/> Yes <input type="checkbox"/> No
Authored Date	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approved Date	<input type="checkbox"/> Yes <input type="checkbox"/> No

c. Footer Options

Assessment Title	<input type="checkbox"/> Yes <input type="checkbox"/> No
Author	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approver	<input type="checkbox"/> Yes <input type="checkbox"/> No
Authored Date	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approved Date	<input type="checkbox"/> Yes <input type="checkbox"/> No

5. Make assessment printing changes with the options provided.
6. Select **Change** to save your edits.

## Printable Assessment Element for Merge Form

Please note: Incorrect mapping of the fields in between assessment and merge form will cause print errors in the system.

Example: if the assessment field name as **FN** than PDF template also needs to name as **assessment[FN]** to pull the assessment information in the template.

Element		Description	Example
patient_field	MRN		<b>MRN:</b> 000068 <b>First Name:</b> Abcd <b>Family Name:</b> Test <b>DOB:</b> 15/01/2023 <b>Gender:</b> 2  <b>Title:</b> Miss
	title		
	given_name		
	family_name		
	date_of_birth		
	gender	Showing as a number. Check <a href="#">here</a> as a reference. <b>2</b> => Female	
	mobile_phone		<b>Mobile:</b> 000444555666 <b>Email:</b> info@clintelsystems.com <b>Employment:</b> 3 <b>Ethnicity:</b> 1101 <b>Nationality:</b> Aus <b>Gender Diversity:</b> Non-Binary
	email		
	employment_status	Showing as a number. <b>3</b> => Employed	
	ethnicity	Showing as a number. <b>1101</b> => Australian	
	nationality	<b>Aus</b> => Australian	
	gender_diversity		
	medicare_number		<b>Medicare Number:</b> 2123456701 <b>Medicare IRN:</b> 9 <b>Medicare Expiry:</b> 30/11/2024 <b>DVA File Number:</b> QSS12345
	medicare_irn		
	medicare_expiry		
	dva_file_number		
address_field	address1		<b>Address:</b> 123 street <b>Suburb:</b> ADELAIDE <b>Post Code:</b> 5000 <b>State:</b> SA
	suburb		
	post_code		
	state_code		
text_field		Suitable for printing text format. For example, if you want to print the gender field as text format, use text_field as gender section in the assessment.	<b>text:</b> testtest  <b>Gender:</b> Male
text_area (Only Plain Text)			

metric	Height	Available to adjust Unit or	<p>Height: 157.0</p> <p>Weight: 50.0</p> <p>BMI: 20.0</p> <p>Blood Glucose Level: 70.0</p> <p>PHQ: 7.0</p> <p>Heart Rate: 75.0</p> <p>SpO2: 96.0</p> <p>Respiration rate: 15.0</p> <p>Temperature: 36.1</p>
	Weight	Decimal Places.	
	BMI	Check <a href="#">here</a> .	
	Blood Glucose Level	Once the assessment is submitted and approved,	
	PHQ	the metric numbers will	
	Heart Rate	be recorded into	
	SpO2	measurements on	
	Respiration Rate	patients' record. Check	
	Temperature	<a href="#">here</a> .	
checkbox		Checkbox element is suitable for yes no choice or any specific name choices. Available to choose multiple choices.	<p>Are you currently taking any medication? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have any symptoms? <input checked="" type="checkbox"/> Fever <input type="checkbox"/> Headache <input type="checkbox"/> Fatigue</p>
date_picker		Suitable for printing date	Signature Date 29/02/2024
select		Select element is suitable to print only one choice from multiple choices in one section	<p>Signed by: Dr. Test 1</p> <p>Yes or No? No</p>

Please note - Some elements are not suitable for printing merge form.

- patient\_detail
- dynamic\_text
- static\_text
- calculation
- clinical\_notes\_history
- signature\_field
- yes\_no
- time\_picker
- metric - Blood Pressure
- appointment\_picker
- guarantor\_picker
- location\_picker
- provider\_picker

- patient\_picker
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