New Assessment (Forms)

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

To build a New Assessment (Forms):

1. Select **Administration**.
2. Select **Assessments** from menu.
    a. The Assessments screen will display.
3. Select **New Assessment** button.
4. Fill in the fields based on the information in the table below.
5. Select **Create Assessment** button.
6. Once the form has been saved, click the **Edit** button to begin building your form.

Field Name	Description	Example
Name	Code for the assessment	File1-Section2
Title	Title for the assessment	Initial Assessment
Version	Version of the assessment. Assessments are version controlled, whenever you create a new copy of an assessment, its version number is incremented by 1. In most cases start with version 1.0. Then the next version of the assessment will be 1.1, then 1.2, and so on.	1.0
Type	Type of intelligent form	In most cases "Assessment" or "Express Form". See Assessment Types.
Category	Categorize your assessments	Administration Clinical Admission Billing
Layout	Horizontal or Stacked	Horizontal

Description	Description of the assessment.	
Ongoing Assessment (check box)	If TRUE then when the assessment is performed, any changes made are locked down upon saving and those changes become read-only. Recommended that this is left as FALSE. May suit a document completed over a number of days/weeks and information already entered is made read-only i.e Monthly Bowel Charts	FALSE
Sharable with patient	Where ticked, if a patient has given consent, this assessment can be shared by email, SMS, or QR code. **Before choosing this, carefully review what patient fields you include**.	FALSE
Enable client side validation (recommended)	This prints the assessments in a more user-friendly and better layout.	Default TRUE
Summary Display [1]	Text-entry field that enables users to specify a summary of the assessment for display in assessment listings (supports HTML).	See screenshots below for note [1].
In which views should this assessment be available? (Check boxes) (this can also be referred to Type of Assessment)	The Assessment will be linked to and available in these areas: ·Patient - links to the current patient. *(The following options are displayed but not available in the current release of CareRight):* ·Admission - links to the current admission (must be used with Patient ticked as well) ·Location - links to the current location ·Provider - links to the current provider N.B. Admission Type Assessments must also have the Patient box checked, as they will link the assessment to a patient's current admission. It is not advisable to change the Type of Assessment after an assessment has been created. For example, if you need to make a Patient Assessment, also an Admission Assessment, then it is best to create a new assessment from scratch.	Initial Assessment: Patient Provider Time log: Provider Location Handover: Location Admission details: Patient, Admission

Workflow Support Workflow Controller		
Which trigger-able classes does this assessment support?	Select any Trigger Scripts to be run when the assessment is approved. These scripts allow actions to happen such as sending SMS, creating additional assessments, or creating invoices. Writing trigger scripts requires JavaScript skills and is not covered in this section.	

NB: If you wish to make changes to an existing form, use the Copy function and edit the copy.