Assessment (Forms) Builder Window

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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.

The assessment builder enables the conversion of forms and assessment tools into electronic format. Assessments can be linked to a patient, Provider or Location.

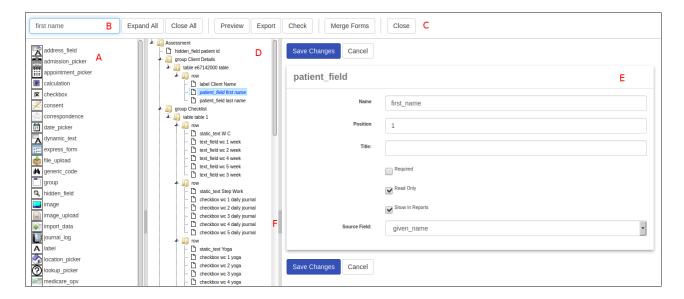Electronic assessments can have added features such as:

- Automatic calculations

- Importing data from other assessments

- Trigger actions on approval such as sending SMS, adding additional assessments creating invoices

- Showing certain questions based on specific answers (branching logic)

- Showing/editing patient data

- Upload/attach files and images to assessments

- Embed images into assessments

- Write data to clinical notes

- Choose locations, staff members or patients via pickers

- Use generic code lists

- Perform Medicare OPVs and OECs

- Take the patient's Digital Signature

- Share assessments with patients through Email/SMS or QR Code

The Assessment Builder screen is used to define the questions, elements and layout of an assessment.

The window is split into the following sections:

Section	Description	Reference
Element toolbar	Each icon represents an element such as a text field, drop down list, calculation, etc.	A

Search Box	Allows searching of form element names - simply type in a term and the element will be highlighted in the Assessment Window (D). If they are in a group that is collapsed, it will expand. N.B. you only need to type into the box, there is no need to hit RETURN or ENTER on your keyboard.	B
Buttons	See below for details	C
Assessment Window / Tree	Drag and drop elements from the Element Toolbar into the Assessment Window on the left. This is how the assessment is built.	D
Element details / Properties	By clicking on an element in the Assessment Window, its editable attributes are displayed in the window on the right. You must press "Save Changes" for your changes to take effect.	E
Resize bar	The resize bars can be dragged so that the sections take more or less space.	F

Buttons

Button Name	Description
Expand All	Expands the assessment tree out, showing all elements.
Close All	Collapses the assessment tree, hiding elements that are inside other elements.
Preview	Opens a preview of the assessment in a new browser window. This should be used to check how the assessment will look to a user.

Button Name	Description
Export	Exports the assessment to a file, which can be used to import the assessment into another CareRight installation.
Check	Runs internal validity checks, such that elements are correctly defined and that any expressions are valid. This check is also executed when you publish an assessment. An assessment cannot be published if these checks return any errors.
Merge Forms	Takes you to the Merge Form (PDF) management screen.
Close	Closes the builder view, returning to the assessment management screen.

Dragging and Dropping Elements

- Drag and drop elements from the Elements Toolbar into the Assessment Window on the left of the screen to add them to the assessment.
- Click each element to edit the attributes. The editable attributes will display to the right.
    - Press the "Save Changes" button to save changes to an element.
- Right click to copy or delete an element.

Note: Do not delete the hidden field "patient_id".