

Assessment Summary Display

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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.

An assessment may have a summary display, which is a template that will be used to display a short custom message when the assessment is viewed in a list. This can allow a user to easily differentiate when there are multiple version of the same form.

The summary display can include references to values from the assessment by including the name wrapped in braces. Basic HTML is allowed, for details see [HTML Formatting](#).

For example, if an assessment has a calculated field named "score" and a text field named "clinical_note" then the following summary display would show them across two lines:

Summary Display

```
1 Score: <b>{score}</b><br>
2 {clinical_note}
```

In a patient's assessment list, they would be replaced with elements from the assessment, e.g.:

Current Assessments

Newest Created

Any State

Search...

Q

Assessment: XSD 001 1.0 - Summary Display Example

Status: Approved

Performed By: Mr System Administrator

Approved By: Mr System Administrator

Created: 02/07/2020 at 04:49 PM

Performed At: 02/07/2020 at 04:49 PM

Approved At: 02/07/2020 at 04:49 PM

Score: 8

Note 123

Show

The summary display can be edited by clicking on the top level "Assessment" object in the assessment builder tree.

Published Assessments

The Summary Display can be edited on a published assessment. This automatically updates the summary for any already completed assessments, but this process can take several minutes if there are lots of them.

To edit the summary display on a published assessment, click the "Edit" action button from the administration assessment list.

Case Assessment Element (v6.70 Enhancement)

To assess specific cases, select Show from the Current Assessments panel. After doing so, the Case Assessment panel appears:

Case Assessment Element

Required fields marked with *

Cases

Show Closed

Case Category	Location	Case Worker	New
Anger	Clintel Clinic - a		Show
Test Case	East St Kilda - room 1		Show
anxiety	Clintel Clinic - a	Mr Train 1	Show
anxiety	Clintel Clinic - a	Mr Train 1	Show
Test Case	East St Kilda - room 1		Show
alcohol	Clintel Clinic - a	Mr Train 1	Show
anxiety	Clintel Clinic - a	Mr Train 1	Show

Approve

Save and continue later

Viewing Closed Cases

By default, this panel will only display cases that have an Open, Hold, or Prepare status. To include Closed cases in the listing, click **Show Closed**.

Create a New Case

Click New to create a new open case. When doing so, you can define the following fields:

- Case Category
- Location
- Room (if enabled for the selected case category)
- Case Worker (if not enabled for bulk assignment for the selected case category)

The case will have the start date set to the current date.

New Case

Case Category

Test Case

Location*

East St Kilda

Ward*

room 2

Reference

Case Worker

Select a provider

Open

Prepare

Cancel

Showing a Case

Click Show to view details about a case

- Case Number
- Case Category
- Reference
- Case Worker
- Locations (show room as well as location id applicable)
- Status
- Start
- End

To change the status of a case, select **Closed**, **Closed - Outcome Achieved**, or **Withdrew** as appropriate.

anxiety - 59

Case Number	59
Case Category	anxiety
Reference	
Case Worker	Mr Train 1
Location	Clintel Clinic
Ward	a
Status	Open
Start	19/10/2020
End	

Hold

Closed

Closed - Outcome Achieved

Withdrew

Cancel

After clicking a status change button, confirm the change as follows:

cr.test.clintelsystems.com says

Change status to Closed - Outcome Achieved?

OK

Cancel

If a case needs to be re-opened, then select **Show Closed** to view the closed cases, click **Show**, then select **Re-Open**.
