

Assessments Building Basics

Last Modified on 04/03/2024 12:29 pm ACDT

CareRight Permission(Roles) required:

The following permissions are required in order to build assess

- Can publish forms/assessments
- Can create/edit forms/assessments

Access Assessment Builder:

CareRight assessment builder can be accessed through *Administration > Assessments*. The Assessments screen displays the following fields:

Field	Descriptions
Current	Current Assessments Tab, this will include assessments that are disabled and active versions.
Archived	Link to the list of archived assessments. Archived assessments can be restored to the current view.
New Assessment	To build a New Assessment
Import	<p>To Import an existing assessment into CareRight. This assessment has to have been built in CareRight and exported.</p> <p>The Import file is an XML file, with the extension ".FORM".</p>
Filter	Type a keyword for the assessment you are looking for and click the apply button to filter for particular assessment/s.
Assessment List	
Name &Version	Code of the assessment
Title	Title of the Assessment
Type	Type of Assessment form
Version	The version number of the assessment
Updated	Date assessment last updated

Actions Links	<p>Links to actions</p> <ul style="list-style-type: none"> • Edit • Destroy (only on unpublished forms) • Publish (only on unpublished forms) • Enable / Disable • Export • Copy • Archive – moves an assessment to the Archive View • Restore – moves an assessment to Current View.
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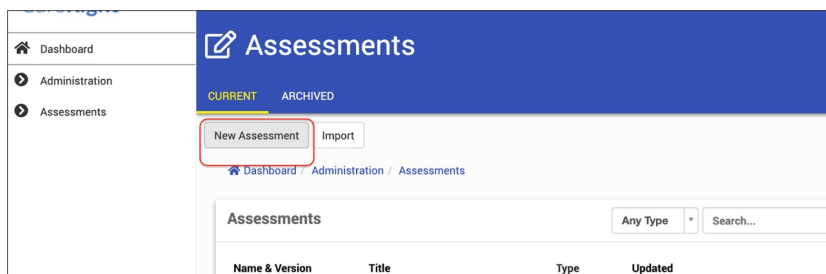
Assessment Types

Please click [here](#) to view the assessment types.

Create a New Assessment

To build a New Assessment

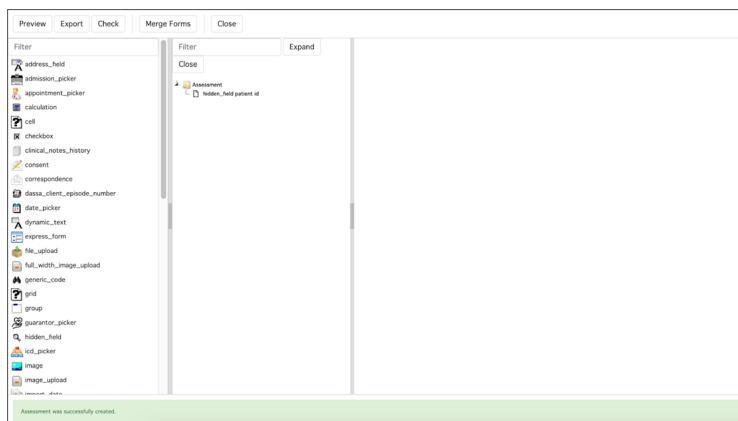
1. Select Administration
2. Select Assessments from the menu
3. The Assessments screen will display.
4. Select the New Assessment button



5. Fill in the fields as specified [here](#).

6. Select the Create Assessment button.

This will now take the user to the Builder Screen.

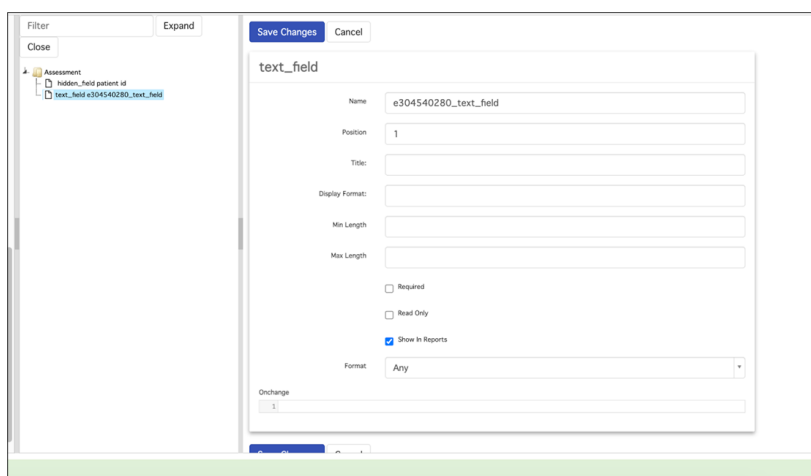


To Build your assessment,

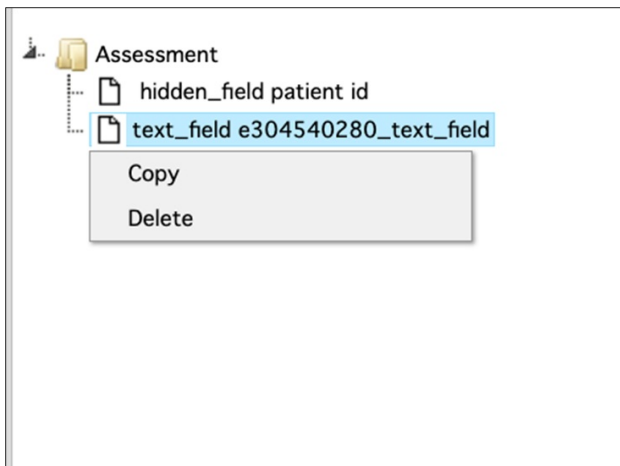
Drag and drop elements from the Elements Toolbar into the Assessment Window on the left of the screen.



Click each element to edit the attributes. The editable attributes will be displayed to the right.



Right-click to copy or delete an element.



Available Assessment Elements

Click [here](#) to view the available assessment elements.

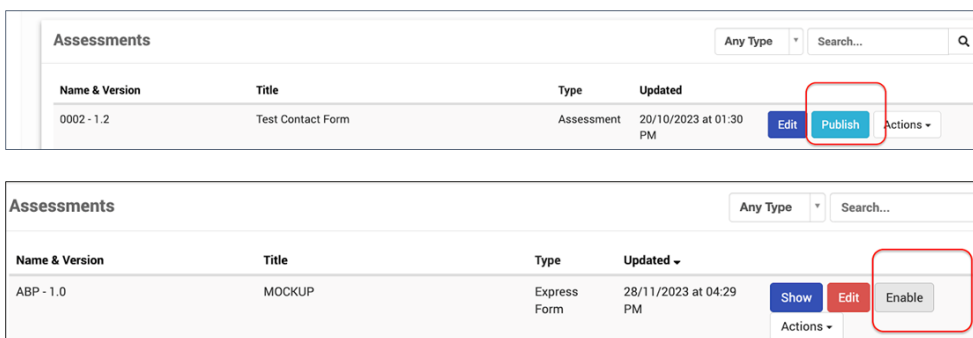
Preview Assessment

Assessments can be previewed while it is building to check the alignments of each element using the Preview button.



Publishing an Assessment:

After the assessment building has been completed, the assessment can be published and enable the end users to start using it.



Updating an existing assessment

To update an existing assessment, you need to create a copy of it and work on that copy. The version number will be incremented automatically when you create a copy.

1. Select Administration
2. Select Assessments from menu
3. Search for the name of the assessment
4. Select the Copy button to create a new version of the assessment
5. Edit the new version, making the required changes

6. Whilst editing, use the Check and Preview buttons in the edit window to ensure the form changes look OK and don't cause any errors
7. When you have finished editing the new version of the assessment, don't forget to enable it:
 - i. Select Assessments
 - ii. Locate the new version of the assessment that you have just finished editing
 - iii. Click Publish
 - iv. Then click Enable
 - v. Follow the steps in the next section to ensure no previous versions of the assessment are active.

Archiving old versions of an assessment

We would advise disabling and archiving all existing versions of an assessment immediately after publishing and enabling an updated version:

1. Select Administration
2. Select Assessments from menu
3. Search for the name of the assessment
4. All old versions of the assessment need to be disabled and archived:
 - i. Click Disable
 - ii. Click Archive

- Referral Triage Form	Assessment	21/10/2023 at 09:58 PM	Show	Edit	Enable
Actions ▾					
- Referral Triage Form	Assessment	21/10/2023 at PM	Edit	Archive	Disable
Enquiry Form	Enquiry	21/10/2023 at PM	Copy	Merge Forms	Disable
Actions ▾					

5. Assessment Printing

To print an assessment (forms), open the patient record and click on Assessments. You will only be able to print assessments (forms) that have been approved. There are two ways to print assessments:

- 1 system default printing.
2. Printing assessment merge form.

System Default Printing

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

1. Select Assessments from the left side menu.

- a. The Assessments screen will display.
2. Search for the relevant Assessment and select the Show button.
 - a. The Assessment will display.
3. Select the Print button at the top of the page and the report will be generated.
 - a. A PDF document will be displayed, and you can print the document from the screen to your local printer.

Printing with PDF Templates (Merge Forms)

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 the 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, 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.

Additional Features and Capabilities

Warning - using Required Fields

You have the ability to make a field "Required" (Mandatory).

For an assessment to be approved, all Required fields must be filled in. As a result, it is important to never nest a 'Required field' inside a 'Show If' block.

A 'Show if' block traditionally only displays values or fields if the certain selection is made from a list. If a required field is within a 'Show If' Block and the 'Show if' Block is not displayed on the screen, then the form will not approve and you will not see any error message to say it hasn't been approved.

HTML formatting

Click [here](#) to read the available number of HTML tags to format some text-based description fields.

Perform Calculations

The assessment builder is capable of performing complex calculations. Click [here](#) to read more.

Building Tables

Click [here](#) to read further.

Trigger Scripting

Some of the sample code that creates an assessment on approval of the assessment.

Digital Signature

CasreRight supports digital signatures. Please click in the link provide below to view demo.

Demo: https://youtu.be/4G_56PTqOqI
