Section Management

Overview

Sections organize your assessment into logical groupings. They help structure content and make assessments easier to navigate. This section covers creating, editing, organizing, and deleting sections.

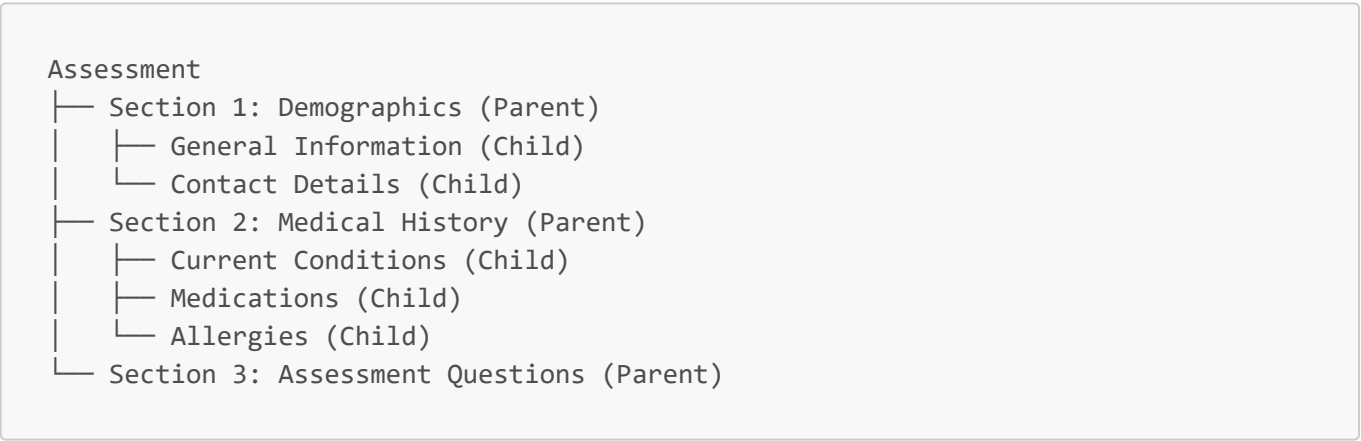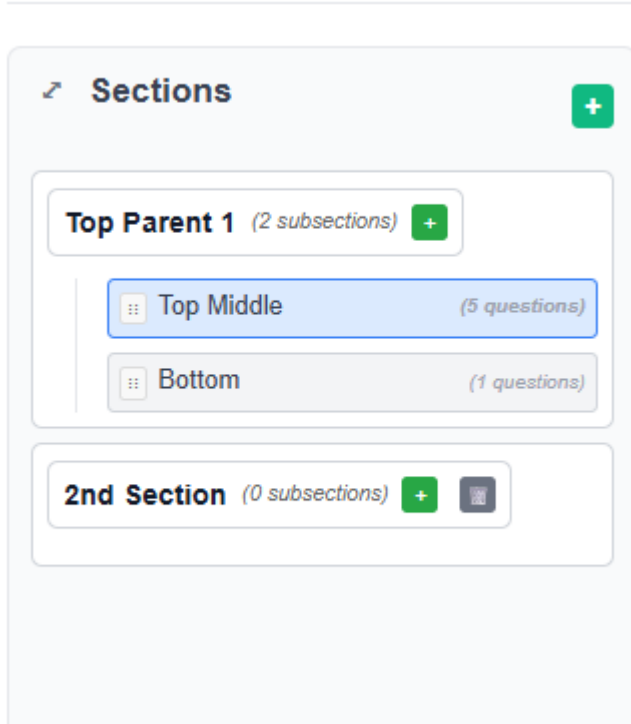
Understanding Sections

What Are Sections?

Sections are organizational containers within an assessment that:

- Group related questions together
- Can contain multiple questions
- Can be nested (parent sections with child subsections)
- Have names from the CareIQ library or custom names
- Maintain a specific order within the assessment

Section Hierarchy

Sections support a parent-child structure:

```
Assessment
├── Section 1: Demographics (Parent)
│   ├── General Information (Child)
│   └── Contact Details (Child)
├── Section 2: Medical History (Parent)
│   ├── Current Conditions (Child)
│   ├── Medications (Child)
│   └── Allergies (Child)
└── Section 3: Assessment Questions (Parent)
```

Creating a New Section

Prerequisites

- Assessment must be in Draft status
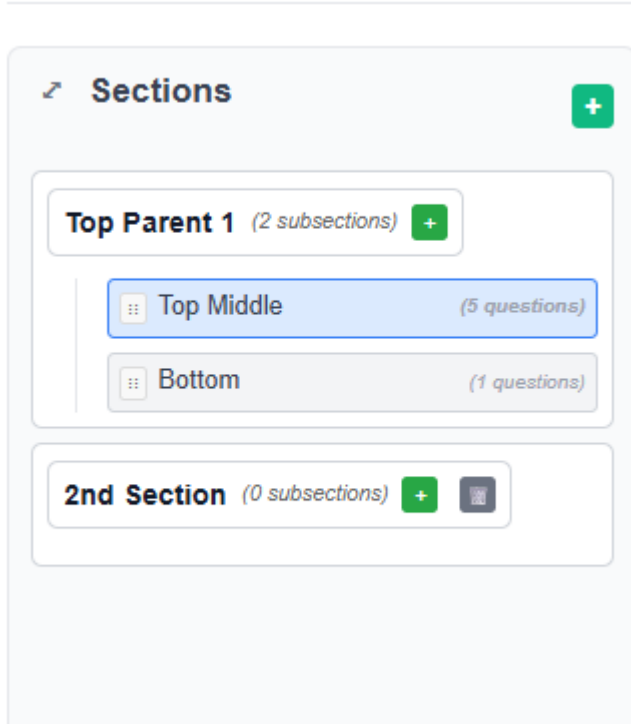- Builder must be in Edit mode
- You must have appropriate permissions

Adding a Top-Level Section

1. **Open the Assessment**

   - Click **"Open"** on an assessment in Draft status
   - Builder interface loads

2. **Locate the Add Section Button**

   - Look in the left panel header (Sections area)
   - Click the **"+ Add Section"** or **"+"** button

3. **Enter Section Name**

- A modal dialog appears with an input field
- Type your section name (e.g., "Demographics", "Medical History")
- Or use the typeahead search to find library sections

4. **Using Library Section Search**

- As you type, matching library sections appear in a dropdown
- Click a library section to select it
- The section name populates automatically
- Library sections may include pre-configured questions

5. **Save the Section**

- Click **"Save"** or press Enter
- The section appears in the left panel
- The new section is automatically selected
- You can now add questions to it
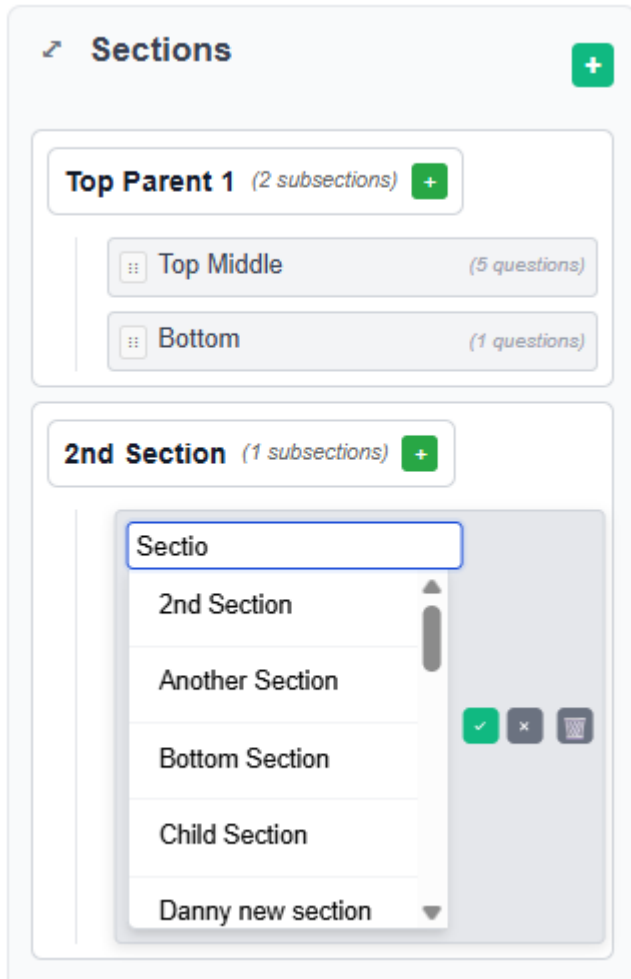
Adding a Child Section (Subsection)

To create nested sections:

1. **Locate the Parent Section**

   - Find the section that should be the parent
   - Hover over the section name
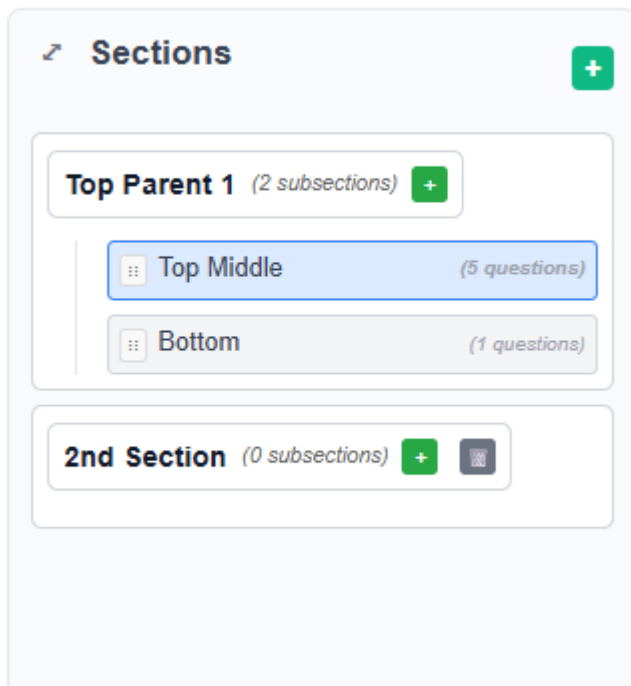
2. **Click Add Child Section Button**

   - A **"+ Add Child"** or similar button appears
   - Click to open the subsection dialog

3. **Name the Subsection**

   - Enter a name or search library sections
   - Click **"Save"**

4. **View the Hierarchy**

   - The subsection appears indented under the parent
   - The hierarchy shows the relationship clearly

Editing Section Names

Quick Edit

1. **Double-Click the Section Name**

   - In the left panel, double-click the section you want to edit
   - The section name becomes an editable input field

2. **Modify the Name**

   - Edit the text directly
   - Or use typeahead to search library sections
   - Library matches appear as you type

3. **Save or Cancel**

   - Press **Enter** to save changes
   - Press **Escape** or click outside to cancel
   - Click the checkmark icon to save
   - Click the X icon to cancel
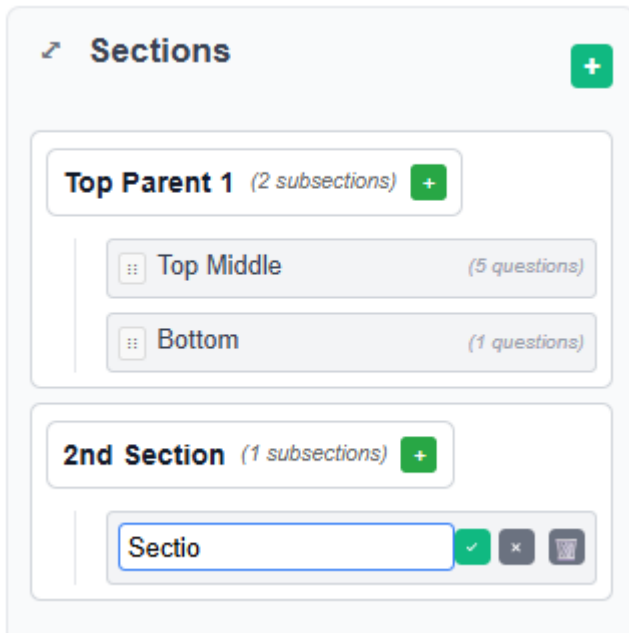
Using Section Library Search

When editing section names:

1. **Start Typing**

   - The typeahead search activates
   - Matching library sections appear in a dropdown

2. **Review Search Results**

   - Each result shows:
     - Section name
     - Description (if available)
     - Source (CareIQ Library)

3. **Select from Library**

   - Click a result to use that library section
   - Or continue typing your custom name
   - Press Escape to close dropdown without selecting

4. **Confirm Selection**

   - Verify the name is correct
   - Click save or press Enter

Deleting Sections

Requirements for Deletion

A section can only be deleted if:

- Assessment is in Draft status
- Builder is in Edit mode
- Section has **no child sections** (subsections must be deleted first)
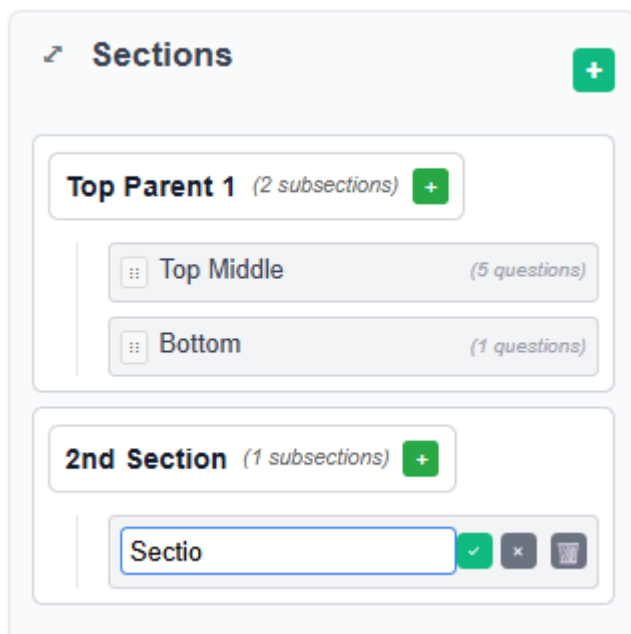- You have appropriate permissions

Delete a Section

1. **Locate the Section to Delete**

   - Find the section in the left panel
   - Ensure it has no child sections

2. **Click the Delete Button**

   - A delete button (trash icon or "×") appears when hovering
   - Click the delete button

3. **Confirm Deletion**

   - A confirmation dialog appears
   - Message: "Are you sure you want to delete this section?"
   - Additional warning if section contains questions

4. **Confirm or Cancel**

   - Click **"Delete"** to proceed
   - Click **"Cancel"** to abort
   - If confirmed, section is removed immediately

⚠️ **Confirm Action**

Are you sure you want to delete section "Section"?

[Cancel] [Continue]
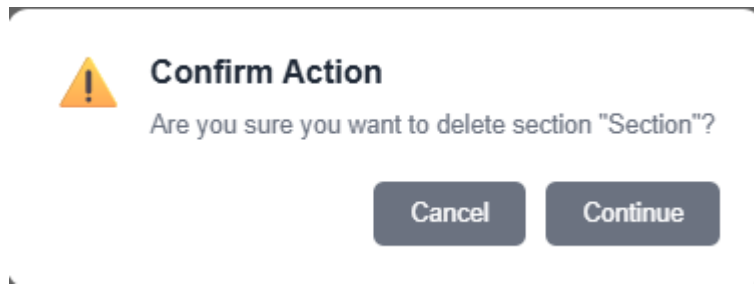
Deleting Sections with Children

Important: You cannot delete a parent section while it has child sections.

To delete a parent section:

1. **Delete All Child Sections First**

   - Start with the bottommost child section
   - Delete each subsection one by one
   - Work your way up the hierarchy

2. **Then Delete the Parent**

   - Once all children are removed
   - Delete button becomes available on parent
   - Follow standard deletion process

What Gets Deleted?

When you delete a section:

- The section record is removed from the backend
- All questions within that section are also deleted
- All answers associated with those questions are deleted
- All relationships for those answers are removed
- **This action cannot be undone**

Reordering Sections

Drag and Drop

Sections can be reordered within the hierarchy:

1. **Click and Hold a Section**

   - Click on a section name in the left panel
   - Hold the mouse button down

2. **Drag to New Position**

   - Move the section up or down

- A visual indicator shows the drop position
- Release the mouse button

3. **Automatic Save**

- The new order is saved automatically
- Sort order updates on the backend
- Questions remain associated with their sections

Reordering Rules

- Sections can be reordered within their level
- Parent sections can be moved among other parent sections
- Child sections can be moved among siblings
- Child sections cannot be moved outside their parent (use separate action to change parent)

Selecting Sections

Why Select a Section?

Selecting a section:

- Displays its questions in the main content area
- Allows you to add new questions to it
- Highlights the section in the left panel
- Sets the context for question management
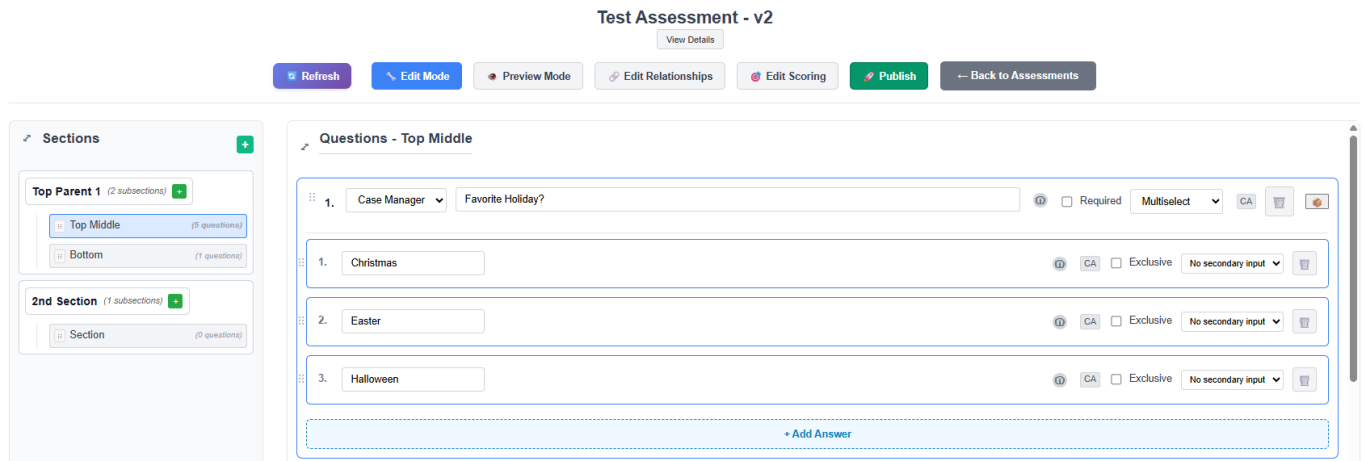
How to Select

1. **Click the Section Name**

- In the left panel, click any section
- The section becomes highlighted

2. **View Section Content**

- The main content area updates
- Shows all questions for that section
- Section name appears as a header

3. **Add Questions**

- With a section selected, click **"+ Add Question"**
- New questions are added to the selected section

Section Navigation

Expanding and Collapsing

Parent sections can be expanded or collapsed:

1. **Expand a Parent Section**

   - Click the expand icon (▶) next to a parent section
   - Child sections become visible beneath it

2. **Collapse a Parent Section**

   - Click the collapse icon (▼)
   - Child sections hide from view
   - Questions in child sections remain intact

Section Panel Visibility

On smaller screens or for more working space:

1. **Toggle Section Panel**

   - Click the panel toggle button
   - Sections panel collapses to the side
   - Provides more room for question content

2. **Reopen Section Panel**

   - Click toggle button again
   - Panel expands back into view

Best Practices

Organizing Content

Use Logical Grouping

- Group related questions together
- Example: All demographic questions in "Demographics" section
- Example: All medical history in "Medical History" section

Create Clear Hierarchies

- Use parent sections for broad categories
- Use child sections for specific sub-topics
- Example:

```
Medical History (Parent)
    ├── Current Conditions (Child)
    ├── Past Surgeries (Child)
    └── Family History (Child)
```

Keep Section Names Clear

- Use descriptive names: "Current Medications" not "Meds"
- Be consistent: "Patient Information" and "Caregiver Information" (parallel structure)
- Avoid abbreviations unless standard in your organization

Using Library Sections

When to Use Library Sections

- Starting a new assessment in a common clinical area
- Leveraging pre-built, validated content
- Ensuring consistency across assessments

When to Use Custom Sections

- Organization-specific content
- Unique clinical workflows
- Specialized assessments

Combining Library and Custom

- Use library sections as a starting point
- Add custom sections for specific needs
- Edit library section names if needed

Section Depth

Recommended Hierarchy Depth

- **One level** (no nesting): Simple assessments with few questions
- **Two levels** (parent + children): Most assessments
- **Avoid deep nesting**: Don't go beyond two levels (parent → child)

Why Limit Depth?

- Easier navigation for users
- Clearer organization
- Better user experience during assessment completion

Common Tasks

Creating a Standard Assessment Structure

Scenario: Setting up a typical patient assessment

1. Create parent section: "Demographics"

    - Add child: "Personal Information"
    - Add child: "Contact Information"

2. Create parent section: "Medical History"

    - Add child: "Current Conditions"
    - Add child: "Medications"
    - Add child: "Allergies"

3. Create parent section: "Assessment"

    - Add child: "Physical Assessment"
    - Add child: "Psychosocial Assessment"

4. Create parent section: "Care Plan"

    - Add child: "Goals"
    - Add child: "Interventions"

Reorganizing Existing Sections

Scenario: Improving assessment structure after initial creation

1. Review current section organization
2. Identify sections that should be grouped
3. Create new parent section if needed
4. Move related sections under parent
5. Delete redundant sections
6. Reorder sections for logical flow

Renaming Sections for Consistency

Scenario: Standardizing section names across assessments

1. Open first assessment
2. Double-click section to edit

3. Use consistent naming (e.g., "Demographics" instead of "Patient Info")
4. Save changes
5. Repeat for other assessments
6. Document naming standards for future use

Troubleshooting

Cannot Add Section

Possible causes:

- Assessment is Published (not Draft)
- Builder is in Preview mode (not Edit mode)
- Insufficient permissions

Solutions:

1. Verify assessment status badge shows "Draft"
2. Click **"Edit Mode"** button if in Preview
3. Contact administrator to verify permissions

Cannot Delete Section

Possible causes:

- Section has child sections (must delete children first)
- Assessment is Published
- Builder is in Preview mode

Solutions:

1. Check if section has subsections (indented items beneath it)
2. Delete all child sections first
3. Verify assessment is in Draft status
4. Ensure Edit mode is active

Section Changes Not Saving

Possible causes:

- Network connection issue
- Session timeout
- Backend error

Solutions:

1. Check system messages for errors
2. Verify connection status at top of screen
3. Try refreshing the page

4. Check browser console for errors
5. Contact administrator if problem persists

Section Disappeared After Refresh

Possible causes:

- Changes were not saved
- Section was deleted by another user
- Data synchronization issue

Solutions:

1. Check if confirmation message appeared after creation
2. Look in all parent sections (may have been created under wrong parent)
3. Use search to locate section
4. Contact administrator to check audit logs

Drag and Drop Not Working

Possible causes:

- Browser compatibility issue
- JavaScript error
- Permissions problem

Solutions:

1. Try refreshing the page
2. Use a supported browser (Chrome, Firefox, Edge, Safari)
3. Check browser console for errors
4. Contact administrator if issue persists

Tips and Tricks

Keyboard Shortcuts

When editing section names:

- **Enter**: Save changes
- **Escape**: Cancel editing
- **Tab**: Move to next editable field (if applicable)

Quick Navigation

- Click section names to quickly switch between them
- Use expand/collapse to focus on specific areas
- Collapse unused sections to reduce visual clutter

Planning Section Structure

Before building:

1. Sketch out your assessment structure on paper
2. Identify main categories (parent sections)
3. List sub-topics (child sections)
4. Group related questions
5. Create sections in the builder based on your plan

Next Steps

Now that you understand section management:

- Learn how to **add questions** to your sections
- Build **answers** for different question types
- Establish **relationships** between content
- **Test your assessment** in Preview mode