Assessment Management

Overview

Assessments are the foundation of the CareIQ Builder. This section covers creating, managing, searching, and organizing assessments.

Creating a New Assessment

Prerequisites

- You must have appropriate permissions to create assessments
- CareIQ Builder must be connected to the CareIQ platform

Step-by-Step Instructions

1. **Open the New Assessment Form**
   - From the assessment list view, click the **"+ New Assessment"** button
   - A modal dialog appears with the assessment creation form

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CareIQ Builder

ℹ️ ✅ 2 answer(s) added to question successfully!	12:25:15

Assessments   Search assessments...   Show: 10 ⌄ per page   **+ New Assessment**

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2. **Fill in Required Fields**

   The form includes the following fields:

Field	Description	Required
Guideline Name	The title of your assessment	Yes
Use Case Category	Clinical category (e.g., Chronic Care)	Yes
Type	Assessment type (Assessment Only, Assessment + Scoring, etc.)	Yes
Content Source	Organization or CareIQ Library	Yes
Code/Policy Number	Unique identifier for the assessment	Yes
Effective Date	When the assessment becomes active	No
Review Date	When the assessment should be reviewed	No
Response Logging	Whether to log responses	No

Create New Assessment

Use Case

Case Management

Guideline Name *

Use Case Category *

Chronic Care ⌄

Usage *

Assessment Only ⌄

Content Source *

Organization

Code/Policy Number *

Effective Date   End Date

mm/dd/yyyy 📅   mm/dd/yyyy 📅

Review Date   Next Review Date

mm/dd/yyyy 📅   mm/dd/yyyy 📅

Response Logging

Use Org Default ⌄

☐ Allow MCG Content

✓ Create Assessment   ✗ Cancel

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3. **Select Use Case Category**

   ○ Click the **"Use Case Category"** dropdown
   ○ Choose from available categories (e.g., Chronic Care, Acute Care, Behavioral Health)
   ○ Categories are loaded from CareIQ configuration

4. **Choose Assessment Type**

- **Assessment Only**: Standard questionnaire
- **Assessment + Scoring**: Includes scoring models for answer values
- **Assessment with Library Content**: Uses pre-defined library content

5. **Enter Code/Policy Number**

   - This should be a unique identifier for your assessment
   - Used for searching and referencing the assessment
   - Example: "CC-001" or "POLICY-2024-001"

6. **Set Dates (Optional)**

   - **Effective Date**: When the assessment goes into effect
   - **Review Date**: When the content should be reviewed for updates
   - Leave blank if not applicable

7. **Create the Assessment**

   - Click the **"Create"** button
   - A success message appears
   - The new assessment opens in the builder

CareIQ Builder

| ℹ️ ✅ Assessment "Test for Admin Guide" created successfully! Opening builder... | 12:41:28 |

Test for Admin Guide - v1

View Details

[⟳ Refresh] [✏️ Edit Mode] [◉ Preview Mode] [🔗 Edit Relationships] [🎯 Edit Scoring] [🚀 Publish] [← Back to Assessments]

⤢ Sections [＋]	⤢ Questions & Problems
No sections found for this assessment.	Select a section to view questions

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What Happens After Creation?

When you create an assessment:

- A new record is created in the CareIQ platform
- The assessment is assigned version 1.0
- Status is set to "Draft" (editable)
- The assessment appears in your assessment list

Opening an Existing Assessment

To View or Edit an Assessment

1. **Locate the Assessment**

- Use the search box to filter by name or policy number
- Or scroll through the assessment list

2. **Click the Assessment Card**

- Click the assessment card to open the latest version
- The builder interface loads

3. **Builder Opens in Appropriate Mode**

- **Draft assessments**: Open in Edit mode (you can make changes)
- **Published assessments**: Open in Preview mode (read-only)

Draft Mode (changes permitted)

Published Mode (Readonly)

Understanding Assessment Status

Assessments have two primary statuses:

Draft Status (Green Badge)

- Assessment is editable
- Can add, edit, and delete sections, questions, and answers
- Can modify relationships
- Can be published when ready
- Not yet finalized

Published Status (Blue Badge)

- Assessment is read-only
- Cannot be modified
- Used for active clinical assessments
- Must create a new version to make changes
- Shows "Create New Version" button instead of "Open" for editing

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Searching and Filtering Assessments

Using the Search Box

The search box filters assessments in real-time:

1. **Click in the Search Box**

   - Located at the top of the assessment list

2. **Type Your Search Query**

   - Search by assessment name: "Diabetes Assessment"
   - Search by policy number: "CC-001"
   - Search is case-insensitive
   - Results filter as you type

3. **Clear the Search**

   - Delete text or click the clear icon
   - All assessments display again

CareIQ Builder

| ℹ️ | ✅ Assessment published successfully! Reloading assessment data... | 12:46:55 |

Assessments   Test Assess   Show: 10 ⌄ per page   **+ New Assessment**

| **Test Assessment** (Latest: v1.0)   **DRAFT** + |
| Policy: assessment-001 |
| Category: Chronic Care |
| Usage: Care Planning |
| Version: 1.0 |
| *Created: 01/10/2025* |

Search Tips

- **Partial matching**: Type part of the name (e.g., "Diab" finds "Diabetes Assessment")
- **Policy numbers**: Use unique codes for quick access
- **Case insensitive**: "diabetes" and "Diabetes" return same results
- **Real-time filtering**: No need to press Enter or click a button

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Viewing Assessment Versions

Assessments can have multiple versions over time. To view version history:

Expanding Version History

1. **Locate an Assessment with Multiple Versions**

   - Look for the expand icon (▼) on assessment cards

2. **Click the Expand Icon**

   - The card expands to show all versions
   - Versions are listed chronologically

3. **View Version Information** Each version shows:

   - Version number (e.g., v1.0, v2.0)
   - Status (Draft or Published)
   - Created date
   - Ended date (if applicable)
   - Action buttons

Barrier Testing (Latest: v3.1)   DRAFT —

Policy: Barrier t2024
Category: Chronic Care
Usage: Care Planning
Version: 3.1
Created: 21/10/2025

Version 3.1   DRAFT

Created: 21/10/2025
Most Recent: Yes

Version 3.0   PUBLISHED

Created: 08/08/2024
Most Recent: No

Version 2.0   PUBLISHED

Created: 08/08/2024
Ended: 06/08/2024
Most Recent: No

Version 1.0   PUBLISHED

Created: 08/08/2024
Ended: 06/08/2024
Most Recent: No

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4. **Collapse the View**
   - Click the collapse icon (▲) to hide versions
   - Only the latest version remains visible

Understanding Version Numbers

- First version: **v1.0**
- Subsequent versions: **v2.0, v3.0, etc.**
- Each version is a complete copy of the assessment at the time of creation
- Published versions cannot be edited
- Draft versions can be edited freely

Pagination

When you have many assessments, use pagination controls:

Changing Items Per Page

1. **Click the Page Size Selector**

   ○ Located above the assessment list
   ○ Default: 10 assessments per page

2. **Choose a Page Size**

   ○ Options: 5, 10, 25, 50
   ○ Larger numbers reduce scrolling but increase load time

3. **Navigate Pages**

   ○ Use the pagination controls at the bottom
   ○ Click page numbers or next/previous buttons

CareIQ Builder

ℹ️ ✅ Assessment published successfully! Reloading assessment data...   12:46:55

Assessments   [Test]   Show: [5 ▾] per page   [+ New Assessment]

Test Logic for Triggered Questions (Latest: v2.0) PUBLISHED +	**Test no dates** (Latest: v1.0) DRAFT +	**Test Previous Answers** (Latest: v1.0) PUBLISHED +
Policy: a-0000 Category: Chronic Care Usage: Assessment Only Version: 2.0 *Created: 03/12/2024*	Policy: a-100 Category: Chronic Care Usage: Care Planning Version: 1.0 *Created: 29/09/2025*	Policy: Test Aug 2024 Category: Chronic Care Usage: Care Planning Version: 1.0 *Created: 26/08/2024*
Test TOC custom (Latest: v1.0) PUBLISHED +	**Testing Single Character Answers with Tyson** (Latest: v1.0) DRAFT +	
Policy: TOC 1 Category: Transitions of Care Usage: Care Planning Version: 1.0 *Created: 12/08/2024*	Policy: testing 2023 Category: Chronic Care Usage: Care Planning Version: 1.0 *Created: 16/11/2023*	

[⏮ First] [← Previous]   Showing 21 - 25 of 26   [Next →] [Last ⏭]

Assessment Card Details

Each assessment card displays important information:

Card Components

```
┌──────────────────────────────────────┐
│  Assessment Title              [▼]  │
│  ──────────────────────────────────  │
│  Status: [Draft] or [Published]     │
│  Policy Number: CC-001              │
│  Category: Chronic Care             │
│  Version: v1.0                      │
│  Created: 2024-01-15                │
│                                     │
│                                     │
└──────────────────────────────────────┘
```

Status Badges

- **Draft** (Green): Editable version
- **Published** (Blue): Read-only, finalized version

Action Buttons

Depending on status, you'll see:

- **Open**: View/edit the assessment
- **Create New Version**: Make a new draft from published assessment
- **Publish**: Finalize a draft assessment (covered in Publishing section)

Best Practices

Naming Conventions

- **Use descriptive names**: "Diabetes Care Management Assessment" not "Assessment 1"
- **Include clinical area**: "Cardiac Rehab Initial Assessment"
- **Be consistent**: Follow your organization's naming standards

Policy Numbers

- **Use unique identifiers**: Avoid duplicates
- **Follow a pattern**: "CC-001", "CC-002" (CC = Chronic Care)
- **Include year if helpful**: "POLICY-2024-001"

Version Management

- **Publish when ready**: Don't leave assessments in draft indefinitely
- **Create versions for updates**: Don't try to edit published assessments
- **Document changes**: Keep notes on what changed between versions

Organization

- **Use categories wisely**: Group similar assessments
- **Regular reviews**: Check review dates and update content
- **Archive old versions**: Work with administrators to clean up unused versions

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Common Tasks

Finding a Specific Assessment

Scenario: You need to find the "Diabetes Management Assessment v2.0"

1. Type "Diabetes" in the search box
2. Locate "Diabetes Management Assessment"
3. Click expand icon to view all versions
4. Find v2.0 in the list
5. Click **"Open"** to view/edit

Creating an Assessment Series

Scenario: Creating related assessments (Initial, Follow-up, Discharge)

1. Create first assessment: "Patient Care - Initial Assessment"
2. Use consistent policy numbers: "PC-INIT-001"
3. Complete and publish
4. Create second: "Patient Care - Follow-up Assessment"
5. Use related policy number: "PC-FU-001"
6. Continue pattern for series

Checking Assessment Status

Scenario: Verifying which assessments are published vs draft

1. Scan assessment list for status badges
2. **Green badges** = Draft (work in progress)
3. **Blue badges** = Published (finalized)
4. Draft assessments can be edited immediately
5. Published assessments require creating new version

Troubleshooting

"Cannot Create Assessment" Error

Possible causes:

- Missing required fields
- Duplicate policy number
- No connection to CareIQ platform
- Insufficient permissions

Solutions:

1. Verify all required fields are filled
2. Check that policy number is unique
3. Ensure "Connected to CareIQ Platform" message is visible
4. Contact administrator to verify permissions

Assessment Not Appearing in List

Possible causes:

- Active search filter
- Wrong page in pagination
- Assessment not yet created
- Page needs refresh

Solutions:

1. Clear the search box
2. Check all pages in pagination
3. Verify creation success message appeared
4. Refresh the browser page

Cannot Open Assessment

Possible causes:

- Assessment loading
- Connection issue
- Permission problem

Solutions:

1. Wait for loading indicator to complete
2. Check system messages for errors
3. Verify connection status
4. Try refreshing the page
5. Contact administrator if problem persists

Next Steps

Now that you understand assessment management:

- Learn how to **organize sections** in your assessment
- Build **questions and answers** for your sections
- Establish **relationships** between content
- **Test and publish** your completed assessment