

# Question and Answer Management

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## Overview

Questions and answers are the core content of your assessment. This section covers creating, editing, and managing questions and their associated answers.

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## Understanding Questions

### What Are Questions?

Questions are individual items within a section that collect information from users. Each question has:

- **Label/Text:** The question displayed to users
- **Type:** How the question is answered
- **Voice:** Who asks or answers the question
- **Answers:** Available response options (for select-type questions)
- **Tooltip:** Optional help text for clarification

### Question Types

CareIQ Builder supports five question types:

Type	Description	User Interface	Use Case
Single Select	Choose one option	Radio buttons	"What is your age range?"
Multiselect	Choose multiple options	Checkboxes	"Select all symptoms that apply"
Free Text	Open-ended response	Text input field	"Please describe your symptoms"
Numeric	Number input	Number field	"How many medications do you take?"
Date	Date selection	Date picker	"When was your last visit?"

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CareIQ Builder

Question added to section successfully! No refresh needed.

10:03:27

Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (4 subsections)

Bottom Section6 (5 questions)

Another Section (2 questions)

New Section (0 questions)

New Section 2 (4 questions)

Questions - New Section

1. Case Manager A Text Question

Enter your answer...

2. Case Manager A numeric question

Enter number...

3. Case Manager A Date Question

mm/dd/yyyy

CareIQ Builder

Question updated successfully!

10:04:25

Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (4 subsections)

Bottom Section6 (5 questions)

Another Section (2 questions)

New Section (0 questions)

New Section 2 (4 questions)

Questions - New Section

1. Case Manager Patient Single Select

1. Yes

2. No

3. Maybe

+ Add Answer

CareIQ Builder

3 answer(s) added to question successfully!

10:05:23

Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (4 subsections)

Bottom Section6 (5 questions)

Another Section (2 questions)

New Section (0 questions)

New Section 2 (4 questions)

Questions - New Section

1. Caregiver Caregiver multi select

1. Yes

2. Abnormal Nutrition-Related

3. Maybe

+ Add Answer

Question Voice

The voice indicates who asks or answers the question:

- Case Manager:** Questions asked by care coordinators

2 / 22

- **Caregiver:** Questions directed to family members or caregivers
- **Patient:** Questions answered directly by the patient

## Creating Questions

### Prerequisites

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

### Adding a New Question

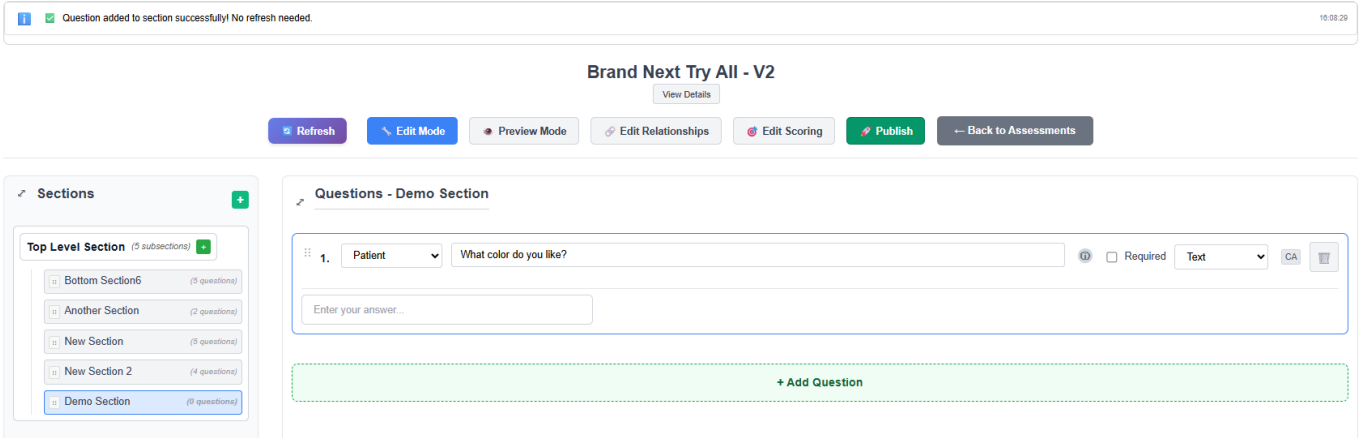
#### 1. Select a Section

- Click a section in the left panel
- The section's questions display in the main area

#### 2. Click Add Question Button

- At the bottom of the questions list
- Click **" + Add Question "** button

### CareIQ Builder



#### 3. Question Appears

- A new question card appears with default values
- Question label shows placeholder text: "New Question"
- Default type: Single Select
- Default voice: Case Manager

#### 4. Edit the Question Label

- Click in the question label field
- Type your question text

5. **Select Question Type**

- Click the **Type** dropdown
- Choose from: Single Select, Multiselect, Free Text, Numeric, Date
- The answer section updates based on type

6. **Select Question Voice**

- Click the **Voice** dropdown
- Choose: Case Manager, Caregiver, or Patient
- Voice is saved automatically

7. **Add Answers** (for Single Select and Multiselect only)

- See "Creating Answers" section below
- Free Text, Numeric, and Date questions don't have predefined answers

Using Library Questions

You can search and use pre-built questions from the CareIQ library:

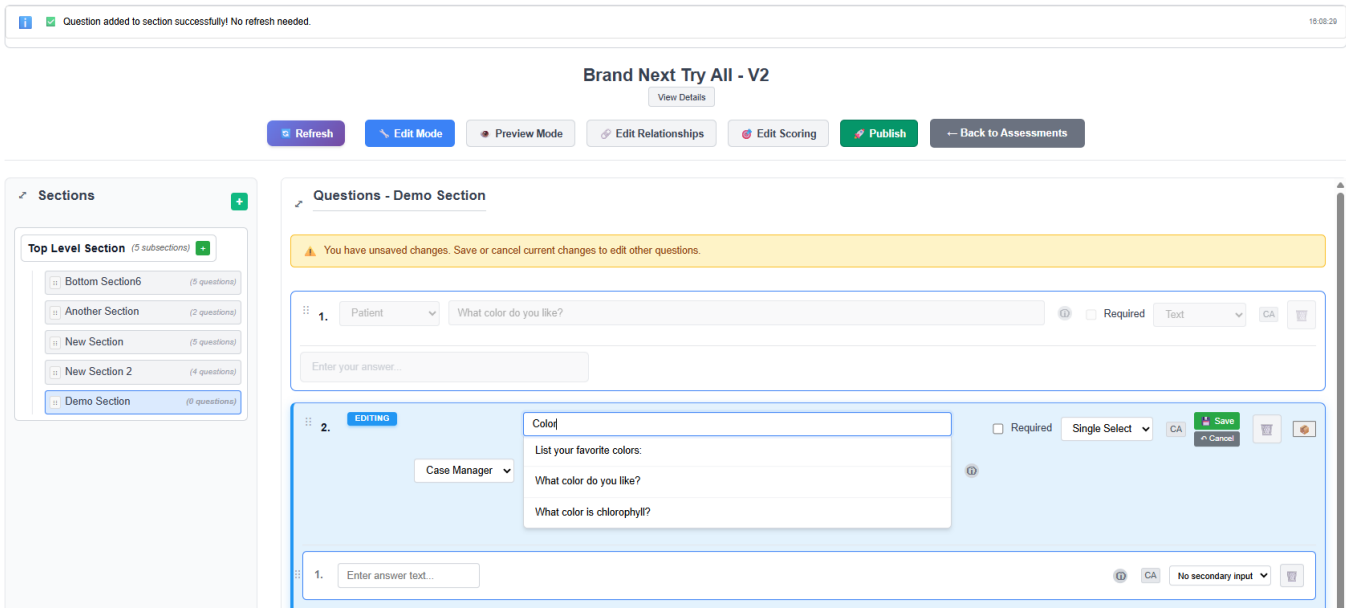
1. **Start Editing Question Label**

- Click in the question label field
- A typeahead search activates

2. **Type to Search Library**

- As you type, matching library questions appear
- Results show question text and metadata

CareIQ Builder



3. **Select from Library**

- Click a library question from the dropdown
- The question label, type, and voice populate automatically
- Answers may also be pre-populated from library

#### 4. Or Use Custom Question

- Continue typing your custom question
  - Press Escape to close the dropdown
  - Enter your own question text
- 

## Adding Tooltips to Questions

Tooltips provide additional help or clarification:

### 1. Locate Tooltip Field

- Below or beside the question label
- Click "**Add Tooltip**" or in the tooltip input field

### 2. Enter Tooltip Text

- Type helpful information
- Example: "Include prescription and over-the-counter medications"

### 3. Save

- Tooltip saves automatically or when question is saved
  - Tooltip appears as an info icon (i) next to question in assessment
- 

## Editing Questions

### Edit Question Label

#### Inline Editing

1. Click in the question label field
  2. Edit the text directly
  3. Changes are tracked (Save/Cancel buttons appear)
- 

### Change Question Type

#### 1. Click Type Dropdown

- Locate the question type selector
- Current type is displayed

#### 2. Select New Type

- Choose a different type
- Warning: Changing type may affect answers

### 3. Impact on Answers

- Changing from Single Select to Multiselect: Answers remain
- Changing to Free Text/Numeric/Date: Answers may become inapplicable
- Confirm the change

## Change Question Voice

### 1. Click Voice Dropdown

- Locate the voice selector
- Current voice is displayed

### 2. Select New Voice

- Choose: Case Manager, Caregiver, or Patient
- Voice updates immediately

## Save Question Changes

After editing a question:

### 1. Changes Are Tracked

- An "unsaved" indicator appears
- **Save** and **Cancel** buttons display

## CareIQ Builder

Question replaced with library question "What color do you like?" (0 answers). Click "Save Changes" to apply.
10:11:37

### Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (5 subsections)

Bottom Section6 (5 questions)

Another Section (2 questions)

New Section (5 questions)

New Section 2 (4 questions)

Demo Section (0 questions)

Questions - Demo Section

You have unsaved changes. Save or cancel current changes to edit other questions.

1. 

EDITING

 Case Manager What color do you like?

Required

Text

CA

Save

Cancel

Enter your answer...

### 2. Click Save Button

- Saves all changes for this question
- API call updates the backend
- Success message appears
- Save/Cancel buttons disappear

### 3. Click Cancel Button

- Discards all unsaved changes

- Question reverts to previous state
- Save/Cancel buttons disappear

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## Deleting Questions

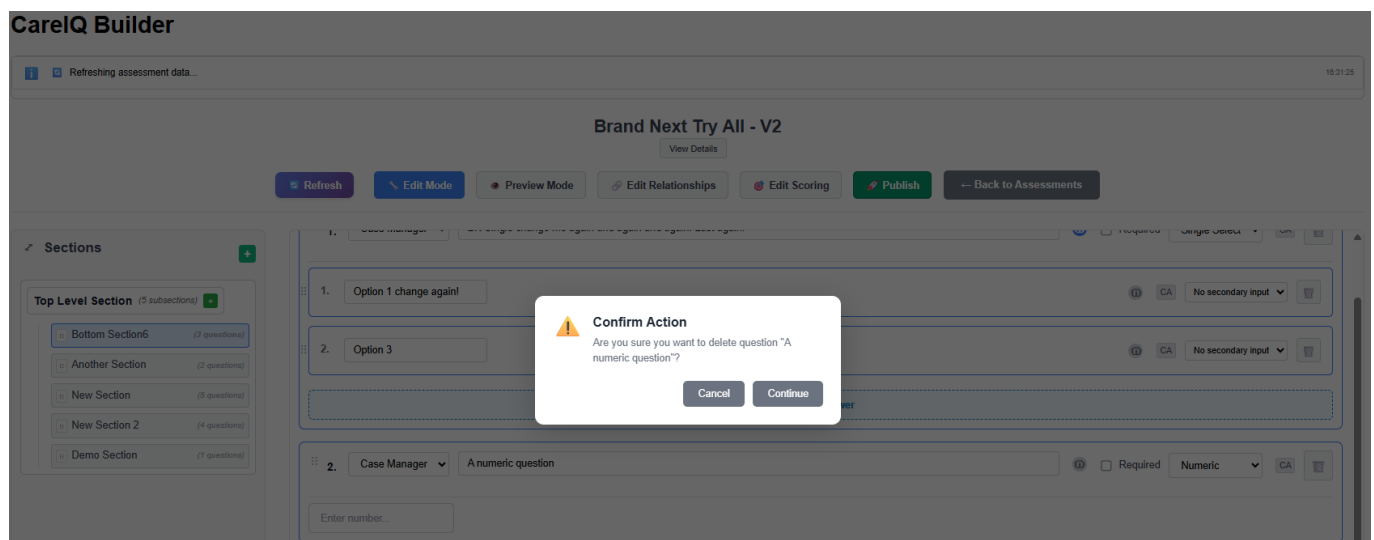
### Delete a Question

#### 1. Locate Delete Button

- Find the question to delete
- Look for delete button (trash icon or "Delete" text)

#### 2. Click Delete Button

- A confirmation dialog appears



#### 3. Confirm Deletion

- Dialog message: "Are you sure you want to delete this question?"
- Warns that all answers will also be deleted
- Click "**Delete**" to proceed or "**Cancel**" to abort

#### 4. Question Removed

- Question and all its answers are deleted from backend
- Question disappears from the list
- Success message appears

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## What Gets Deleted?

When you delete a question:

- The question record is removed
- All associated answers are deleted

- All relationships for those answers are removed
- Any triggered question links are broken
- **This action cannot be undone**

# Moving Questions Between Sections

You can move questions from one section to another:

## Move a Question

### 1. Locate the Move Button

- Find the question to move
- Click **"Move to Section"** or similar button

### 2. Select Target Section

- A dropdown or modal appears with available sections
- Choose the destination section

## CareIQ Builder

Refreshing assessment data ...

10:31:25

Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (5 subsections)

Bottom Section6 (3 questions)

Another Section (2 questions)

New Section (5 questions)

New Section 2 (4 questions)

3mo Section (1 questions)

Questions - Bottom Section6

1. Case Manager BN Single change me again and again and again! Last again. Required Single Select CA

1. Option 1 change again! CA No secondary input

2. Option 3 CA No secondary input

Add Answer

2. Case Manager A numeric question Required Numeric CA

Enter number...

Case Manager To be triggered!! Modified Required Single Select CA

CareIQ Builder

Question "A numeric question" moved successfully from "Bottom Section6" to "Demo Section"

10:34:05

Brand Next Try All - V2

View Details

Refresh

Edit Mode

Preview Mode

Edit Relationships

Edit Scoring

Publish

Back to Assessments

Sections

Top Level Section (5 subsections)

Bottom Section6 (3 questions)

Another Section (2 questions)

New Section (5 questions)

New Section 2 (4 questions)

Demo Section (1 questions)

Questions - Demo Section

1. Case Manager A numeric question Required Numeric CA

Enter number...

2. Patient What color do you like? Required Text CA

Enter your answer...



3. **Confirm Move**

- Click "**Move**" or "**Confirm**"
- A loading indicator appears

4. **Question Moves**

- Question is added to the target section
- Question is removed from the current section
- Success message appears

5. **Verify Move**

- Navigate to the target section
- Confirm the question appears there

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# Understanding Answers

## What Are Answers?

Answers are response options for Single Select and Multiselect questions. Each answer has:

- **Label:** The text displayed to the user
- **Alternative Wording:** Optional variations of the answer
- **Tooltip:** Optional help text
- **Mutually Exclusive:** Flag indicating this answer excludes other options
- **Secondary Input:** Additional input required when this answer is selected

## Secondary Input Types

Some answers require additional information:

Secondary Input Type	Description	Example
None	No additional input	"Yes" or "No"
Text	Free text input	"Other (please specify)"
Date	Date picker	"If yes, when?"
Numeric	Number input	"How many?"

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# Creating Answers

## Prerequisites

- Question must be Single Select or Multiselect type
- Assessment must be in Draft status
- Builder must be in Edit mode

## Adding an Answer

## 1. Locate Add Answer Button

- Under the question, in the answers area
- Click "+ Add Answer" button

### CareIQ Builder

Question "A numeric question" moved successfully from "Bottom Section6" to "Demo Section"

10:24:05

Brand Next Try All - V2

View Details

Refresh Edit Mode Preview Mode Edit Relationships Edit Scoring Publish Back to Assessments

Sections

Top Level Section (5 subsections)

- Bottom Section6 (3 questions)
- Another Section (2 questions)
- New Section (5 questions)
- New Section 2 (4 questions)
- Demo Section (1 question)

Questions - New Section

1. Caregiver Caregiver multi select Required Multiselect CA

1. Yes CA Exclusive No secondary input

2. Abnormal Nutrition-Related CA Exclusive No secondary input

3. Maybe CA Exclusive No secondary input

+ Add Answer

## 2. Answer Appears

- A new answer card appears
- Default label: "New Answer" or placeholder text
- Default settings applied

## 3. Edit Answer Label

- Click in the answer label field
- Type your answer text
- Example: "Yes", "No", "18-25 years", "Diabetes"

## 4. Or Use Library Answer

- As you type, typeahead search activates
- Matching library answers appear
- Click a library answer to use it
- Or continue with custom text

## CareIQ Builder

Question "A numeric question" moved successfully from "Bottom Section6" to "Demo Section1" 19:34:05

Brand Next Try All - V2

View Details

Refresh Edit Mode Preview Mode Edit Relationships Edit Scoring Publish Back to Assessments

Sections

Top Level Section (5 subsections)

- Bottom Section6 (3 questions)
- Another Section (2 questions)
- New Section (5 questions)
- New Section 2 (4 questions)
- Demo Section (1 questions)

1. Yes

2. Abnormal Nutrition-Related

3. Maybe

4. Yes

Yes - complicated discharge planning

Yes - few

Yes (list schedule)

Yes (list what type and how many)

+ Add Answer

### 5. Configure Answer Options

- Set secondary input type if needed
- Mark as mutually exclusive if applicable
- Add tooltip for clarification

## Setting Secondary Input Type

For answers requiring additional information:

### 1. Locate Secondary Input Dropdown

- Below or beside the answer label
- Default: None

### 2. Select Input Type

- **None:** No additional input required
- **Text:** User can type additional details
- **Date:** User must select a date
- **Numeric:** User must enter a number

### 3. Example Use Cases

- "Other (please specify)" → Text input
- "Previous diagnosis (when?)" → Date input
- "Number of hospitalizations" → Numeric input

## CareIQ Builder

Question "A numeric question" moved successfully from "Bottom Section6" to "Demo Section1" 10:34:05

**Brand Next Try All - V2**

View Details

Refresh Edit Mode Preview Mode Edit Relationships Edit Scoring Publish Back to Assessments

Sections

Top Level Section (5 subsections)

- Bottom Section6 (3 questions)
- Another Section (2 questions)
- New Section (0 questions)
- New Section 2 (4 questions)
- Demo Section (1 questions)

Questions - New Section

1. Caregiver Caregiver multi select Required Multiselect CA

1. Yes CA Exclusive No secondary input

2. Abnormal Nutrition-Related CA Exclusive Text input

3. Maybe CA Exclusive No secondary input

+ Add Answer

## Marking Mutually Exclusive

Mutually exclusive answers prevent other selections:

### 1. Locate Mutually Exclusive Checkbox

- In the answer configuration area
- Label: "Mutually Exclusive" or similar

### 2. Check the Box

- Indicates this answer excludes all other options
- Typically used for "None", "Not Applicable", "Decline to Answer"

### 3. Behavior

- When user selects this answer, all other answers are deselected
- Only applies to Multiselect questions
- Example: "None of the above" in a symptom list

## Editing Answers

### Edit Answer Label

#### 1. Click in Answer Label Field

- Click to activate inline editing
- Or use typeahead to search library

#### 2. Modify Text

- Edit the answer text
- Or select from library results

#### 3. Save Changes

- Changes are tracked automatically
  - Click **Save** button at question level to persist all changes
- 

## Add Alternative Wording

Alternative wording provides variations of the answer for different contexts:

### 1. Locate Alternative Wording Field

- Below or beside the main answer label
- May be labeled "Alt Wording" or similar

### 2. Enter Alternative Text

- Type an alternative phrasing
- Example: Answer "Yes" could have alt wording "Affirmative"

### 3. Use Cases

- Report generation with different terminology
  - Multi-language support
  - Clinical vs. patient-friendly language
- 

## Add Answer Tooltip

### 1. Locate Tooltip Field

- In the answer configuration area
- Click "**Add Tooltip**" if not visible

### 2. Enter Tooltip Text

- Provide clarification or examples
- Example: "Select this if symptoms have lasted more than 3 months"

### 3. Tooltip Display

- Appears as an info icon next to answer in assessment
  - User hovers or clicks to see tooltip text
- 

## Deleting Answers

### Important: Two-Step Delete Process

Answer deletion uses a **Save & Delete** pattern:

### 1. Click Delete Button

- Locate the delete button on the answer
- Click to mark answer for deletion

## 2. Answer Marked for Deletion

- Answer may show visual indicator (strikethrough, red background, etc.)
- Answer is NOT yet deleted from backend

### CareIQ Builder

Question "A numeric question" moved successfully from "Bottom Section6" to "Demo Section1" 19:34:05

Brand Next Try All - V2

View Details

Refresh Edit Mode Preview Mode Edit Relationships Edit Scoring Publish Back to Assessments

**Sections**

- Top Level Section (5 subsections)
  - Bottom Section6 (3 questions)
  - Another Section (2 questions)
  - New Section (5 questions)
  - New Section 2 (4 questions)
  - Demo Section (1 questions)

**Questions - New Section**

You have unsaved changes. Save or cancel current changes to edit other questions.

1. **EDITING** Caregiver Caregiver multi select ☐ Required Multiselect CA **Save** **Cancel**

1. Yes ☐ CA ☐ Exclusive No secondary input

2. Abnormal Nutrition-Related ☐ CA ☐ Exclusive No secondary input

3. Maybe ☐ CA ☐ Exclusive No secondary input

+ Add Answer

## 3. Click Save Button

- At the question level, click **"Save"** button
- Confirms deletion

## 4. Or Click Cancel

- Click **"Cancel"** to undo the deletion
- Answer returns to normal state

## 5. Deletion Complete

- After clicking Save, answer is removed from backend
- Success message appears
- Answer disappears from list

## Why Two-Step Deletion?

- Prevents accidental deletions
- Allows multiple changes before saving
- Groups all modifications into one save operation
- Provides clear undo mechanism

## Managing Triggered Questions

### What Are Triggered Questions?

Triggered questions (also called "branch questions") appear only when specific answers are selected. They enable conditional logic in assessments.

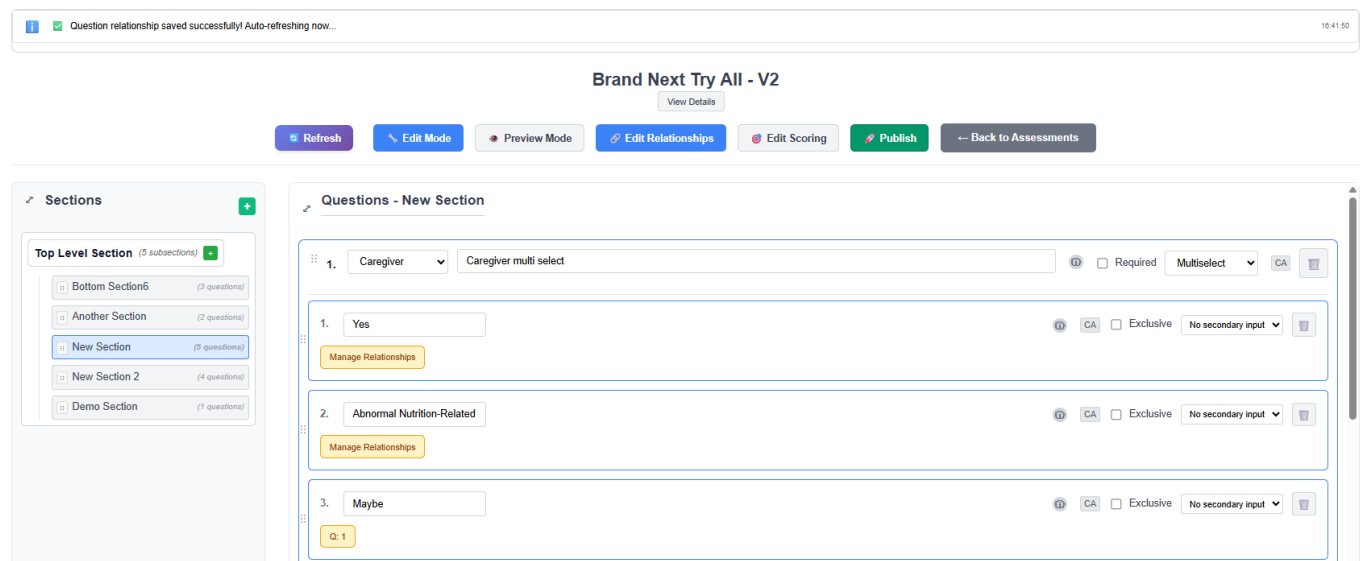
## Viewing Triggered Questions

Answers with triggered questions show an indicator:

### 1. Look for Link Icon

- Appears on answer cards
- May show a number (e.g., "2 triggered questions")

## CareIQ Builder



### 2. View Triggered Questions

- Icon shows how many questions are triggered
- Questions appear when answer is selected in Preview mode

## Adding Triggered Questions

Adding relationships is covered in the "Relationship Management" section, but here's a quick overview:

1. Click the relationship button on an answer
2. Navigate to the "Questions" tab
3. Search for questions to trigger
4. Select and confirm

## Removing Triggered Questions

### 1. Locate Delete Button

- On the triggered question indicator
- Click the "x" or delete button

### 2. Confirm Deletion

- Confirmation dialog appears

- Click "**Delete**" to remove relationship

### 3. Relationship Removed

- Triggered question link is deleted
  - Question still exists but is no longer triggered by this answer
- 

## Best Practices

### Question Writing

#### Be Clear and Concise

- Use simple language
- Avoid medical jargon unless appropriate for audience
- Example: "Do you have diabetes?" vs. "Have you been diagnosed with diabetes mellitus?"

#### One Question, One Concept

- Don't combine multiple questions
- Bad: "Do you smoke or drink alcohol?"
- Good: Two separate questions for smoking and alcohol

#### Use Appropriate Question Types

- Single Select: When only one answer is valid
  - Multiselect: When multiple answers apply
  - Free Text: When you need detailed, open-ended responses
  - Numeric: When collecting measurements or counts
  - Date: When timing is important
- 

### Answer Writing

#### Provide Complete Options

- Include all reasonable choices
- Add "Other (please specify)" with text input for unlisted options
- Include "Prefer not to answer" or "Unknown" when appropriate

#### Use Parallel Structure

- Keep answer formats consistent
- Example: "Daily", "Weekly", "Monthly", "Yearly" (not "Every day", "Once a week", etc.)

#### Order Answers Logically

- Chronological: "Never", "Former", "Current"
- Numerical: "0-5", "6-10", "11-15", "16+"
- Alphabetical: For long lists of items
- Most to least common: For symptom lists



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## Voice Selection

### Case Manager Voice

- Questions the care coordinator asks
- Administrative or assessment questions
- Example: "What is the patient's primary language?"

### Patient Voice

- Questions answered by the patient
- Personal experience and symptoms
- Example: "How would you rate your pain level?"

### Caregiver Voice

- Questions directed to family or caregivers
  - Observations about the patient
  - Example: "Have you noticed changes in memory or behavior?"
- 

## Secondary Inputs

### When to Use Text Input

- "Other" options: "Other (please specify)"
- Additional details: "If yes, please describe"

### When to Use Date Input

- Timing of events: "If yes, when did this occur?"
- Historical dates: "Date of diagnosis"

### When to Use Numeric Input

- Counts: "How many medications?"
  - Measurements: "Weight in pounds"
  - Ratings: "On a scale of 1-10"
- 

## Mutually Exclusive Answers

### Use for:

- "None of the above" in multiselect lists
- "Not applicable" options
- "Decline to answer" choices

### Don't use for:

- Regular answer options
- Answers that can logically coexist with others

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## Common Tasks

### Creating a Yes/No Question

1. Add question: "Have you been diagnosed with diabetes?"
  2. Set type: Single Select
  3. Set voice: Case Manager or Patient
  4. Add answer: "Yes"
  5. Add answer: "No"
  6. Save question
- 

### Creating a Symptom Checklist

1. Add question: "Select all symptoms you are currently experiencing"
  2. Set type: Multiselect
  3. Set voice: Patient
  4. Add answers: "Headache", "Nausea", "Dizziness", "Fatigue", "Other"
  5. Set "Other" answer secondary input: Text
  6. Add answer: "None of the above"
  7. Mark "None of the above" as mutually exclusive
  8. Save question
- 

### Creating an Age Range Question

1. Add question: "What is your age?"
  2. Set type: Single Select
  3. Set voice: Patient
  4. Add answers: "Under 18", "18-25", "26-35", "36-45", "46-55", "56-65", "66+"
  5. Save question
- 

### Creating a Free Text Question

1. Add question: "Please describe your current symptoms in detail"
  2. Set type: Free Text
  3. Set voice: Patient
  4. Add tooltip: "Include when symptoms started and any patterns you've noticed"
  5. Save question (no answers needed for Free Text)
- 

### Creating a Numeric Question

1. Add question: "How many medications are you currently taking?"
2. Set type: Numeric
3. Set voice: Patient
4. Add tooltip: "Include prescription and over-the-counter medications"
5. Save question (no answers needed for Numeric)

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## Moving a Question to Different Section

1. Locate question to move
  2. Click "Move to Section" button
  3. Select target section: "Medical History"
  4. Confirm move
  5. Navigate to "Medical History" section
  6. Verify question appears there
- 

## Troubleshooting

### Cannot Add Question

**Possible causes:**

- No section selected
- Assessment is Published (not Draft)
- Builder is in Preview mode
- Insufficient permissions

**Solutions:**

1. Click a section in the left panel to select it
  2. Verify assessment status is "Draft"
  3. Click "Edit Mode" button
  4. Contact administrator for permissions
- 

### Cannot Save Question Changes

**Possible causes:**

- Network connection issue
- Invalid question data
- Backend error
- Session timeout

**Solutions:**

1. Check system messages for specific errors
  2. Verify all required fields are filled
  3. Try refreshing the page
  4. Check browser console for errors
  5. Contact administrator if problem persists
- 

### Question Changes Lost After Refresh

**Possible causes:**

- Didn't click Save button
- Save failed silently
- Network interruption during save

**Solutions:**

1. Always watch for success message after clicking Save
  2. Don't refresh browser until changes are saved
  3. Check system messages for errors
  4. Use stable network connection
- 

## Answer Typeahead Not Working

**Possible causes:**

- Too few characters typed
- No matching library content
- Backend search issue

**Solutions:**

1. Type at least 3 characters
  2. Try different search terms
  3. Check connection status
  4. Create custom answer if library search fails
- 

## Cannot Delete Answer

**Possible causes:**

- Forgot to click Save button after marking for deletion
- Answer has relationships that must be removed first
- Insufficient permissions

**Solutions:**

1. Mark answer for deletion, then click Save at question level
  2. Remove triggered question relationships first
  3. Contact administrator for permissions
- 

## Triggered Questions Not Appearing in Preview

**Possible causes:**

- Still in Edit mode (not Preview mode)
- Triggering answer not selected
- Relationship not properly configured

**Solutions:**

1. Click "Preview Mode" button
  2. Select the answer that should trigger questions
  3. Verify relationship is configured (see Relationship Management section)
  4. Check that triggered question is in same assessment
- 

## Tips and Tricks

### Keyboard Shortcuts

- **Tab**: Move between fields in question editor
  - **Enter**: Save changes in some fields
  - **Escape**: Cancel editing / close dropdown
- 

### Copy Question Text

To reuse question text:

1. Select and copy question label text
  2. Add new question
  3. Paste text and modify as needed
- 

### Quick Testing

To quickly test a question:

1. Save your changes
  2. Click "Preview Mode"
  3. Navigate to the section
  4. Answer the question
  5. Verify behavior
  6. Return to "Edit Mode"
- 

### Bulk Answer Creation

For long lists of answers:

1. Prepare answers in a text editor
  2. Copy and paste into each answer field
  3. Much faster than typing each individually
- 

## Next Steps

Now that you understand question and answer management:

- Learn how to **create relationships** between answers and clinical content
- Explore **PGI (Problem-Goal-Intervention)** linking

- **Test your assessment** in Preview mode
- **Publish** your completed assessment