Assessment Forms

Contents

Overview

Assessment forms are used to capture and record a wide amount of information about patients from initial assessment to discharge.

Many services at BCHC use a 'Core Form' assessment form which when recorded will automatically populate information into other linked assessment forms.

Accessing Assessment Forms

Assessment forms can be accessed via the **Client's Portal**:

- Open the **Clinical Portal** for your patient
- Locate the **Navigation** pane (right)
- Locate and open the **relevant Assessments** folder
- Click the relevant **Assessment form** link

The **Rio Forms** screen will load.

To the **left** of the screen is a pane displaying folders. Each folder will contain forms or links to forms.

The **blue folder** icon indicates that no forms in the folder have been completed.

The **yellow folder** icon indicates that at least one form in the folder has been completed.

- Click to open a folder

Within the folders you will see a list of forms and links to forms.

The **black form** icon indicates the form has never been completed.

The **white form** icon indicates the form has been completed.

The **link** icon is a link to the form which is stored in another folder in Rio.

- Click the **required form**

Creating a New Assessment Form

If the form has **never been recorded,** you will be taken **directly to the form.**

If the form has been **recorded previously**, the **Index view** will load.

The Index view displays other versions of the form, showing information about when the form was recorded and who by.

- Click **Create New** (bottom)

If the form has been completed previously, the previously recorded values may display. These values can be updated as required.

Any fields which display in pink are mandatory and must be completed.

Many forms contain **Yes/No radio buttons** ⬚ Yes | ⬚ No ⬚.

Selecting Yes ⊙ will often expand this section, displaying further information or fields to complete.

Many forms contain sections which display an Add button **Add**.

If you enter information, you will need to click the Add button to ensure the information turns green and will be saved when you save the form.

Failing to click the Add button will mean the information will not be saved.

Many forms also contain **links** to parts of the **Rio patient record** or to other **Sub-forms**.

Clicking a link will open a **new window** which displays the required part of the patient's Rio record or Sub-form.

To the top right of the new window you will see controls ⊖ ⊕ ▾ ✖ which allow you to:

Minimise the window ⊖

Rio Clinical Con...   ⬚ ⊕ ▾ ✖   If the window is minimised, it will display in the lower left corner of the screen.

- You will need to click the **Restore** button ⬚ to return it to its previous size

Maximise the window ⊕ (make the window fill the entire screen)

Collapse the window ⬚ (make just the top banner display and hide the form details)

Close the window ✖

- **Enter** the required information to complete the Sub-form or update the Rio record

- **Save** the information/Sub-form

- **Close** the window ✖

When information is entered into a Sub-form or other parts of the Rio record via a new window, the information **will not display** in the main form until the form has been saved.

- Continue to complete the form
- Click **Save** (bottom) to save the form

Viewing Previous Versions of Assessment Forms

Previous versions of the form can be opened and viewed by clicking on the form in **Index view**.

- Click a form

When the form opens at the very bottom of the screen you will see a number of **buttons** and **arrows**.

The **Edit current** button allows you to edit the form you have open and should only be used to amend incorrect information.

The **Create new** (or Add) button will allow you to create a new form.

The **Index** button returns you to the Index view of all the previously recorded forms.

The **History** button displays previous versions of an edited form.

The **Entered in Error** button will mark the form as Entered in Error (note the Entered in Error button does not display on all forms).

Note once marked as Entered in Error the form, although still viewable, cannot be edited or un-marked.

The **First** arrow ◄◄ takes you to the first saved form.

The **Previous** arrow ◄ takes you to the previous saved form.

2 / 2 displays which form of how many forms you are viewing.

The **Next** arrow ► takes you to the next saved form.

The **Last** arrow ►► takes you to the last saved form.