



ADDING FORMS

Settings > Form Settings > Add Form

FORMS 1.0

FORMS 2.0

Setting	S				
System Settings	Agency Information	Locale Repor	rt Settings	Form Context	Phone Time Keeping
Custom Report Report Categorie	Templates		New Custom Re All Categories	eport + New Cate	egory + Print Template Lie
					Name
		~	Diana signat	ure	
		~	DNU 1. Infus	ions Adult Nurs	sing Visit Note
		~	DNU DNU 1.	Infusions Adult	Nursing Visit Note
		1	. Infusions A	Adult Nursing Vis	sit Note
		1	234		
		4	85		

Although Form Settings (previously called Report Settings) has a whole new look, all the same basic configuration settings and field options exist in Forms 2.0.

CONFIGURING FORMS

FORMS 1.0)
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The same options will be available in the Add Form dialogue as in the New custom report form dialogue in the Forms 1.0.

For form types:

- Report (Regular) > Form (Regular)
- Dispatchable Task > Task
- Dispatchable Event Task > Event Task.

New Custom Report Form	Form Config	
Name		Name *
Turne .	Wound Care Chart	Wound Car
Information/instructions (Optional)	Instructions for employees (Optional)	Information/I
Restrict Submit to	Type to add role, if left blank allows all	
	Home Care Nurse	Restrict Subn
Restrict View to	Type to add role, if left blank allows all	+ Horr
Category		Category Start typing
Status	Enabled	Type *
Туре	Report (Regular)	Form (regu
Subtype		Clinical Event
Report Language	English	Requires
Clinical Event Name		Display F
For Admin Eyes Only		
Notify Alert Queue		Exclude
Approve Automatically		Pre-Pop
Exclude From Shift Report		Approve
Display Report In Client Dashboard		
Pre-Populate With the Most Recent Report	✓	For Adm
Requires Clock-In		Notify Al

/ound Care Chart ormation/Instructions 🕕 strict Submit to 🚺 Home Care Nurse 🗙 Restrict View to 🕕 Ŧ tegory Language * art typing English orm (regular) ~ ical Event Nam Requires Clock-in Display Form in Client Dashboard Exclude from Visit Reports Pre-Populate with the Most Recent Form Approve Automatically For Admin Eves Only Notify Alert Queue

FORMS 2.0





BUILDING FORMS

NOTE: Fields under Basic in 2.0 correspond to the types of fields available in the Type dropdown in Field Setup in Forms 1.0.

FORMS 1.0

FORMS 1 O

FORMS 2.0

FORMS 2 O



Form builder allows you to design your form using a variety of different form components to create fields and sections. You add fields to the form by dragging and dropping the components on the left into the body of the form.

ADDING FORMS FOR A CLIENT

Client Profile > Care Documentation > Client Forms > Add Client Form NOTE: Client and Service Reports have been removed.

Gemma Ryan 🗣				Overview	Demographics	Events	Care Documentation	Services	Tasks				
Overview	Demographics	Events	Care Documentation	Client Reports	Service Reports	Medical H	History	Uni	approved 🗙				Add Client Form
					Care Plan	n l	ID 💠 Form		ved by	Approved on 🗢 Background Jo		ob 🚦	
Service Details and Reporting				Progress	Notes	6278 0 ⁻	278 01 Pain Assessment Form		-	View -			
Service			Personal Care			Documer	nt	6277 0 ⁻	01 Pain Assessment Form		-	-	View 🔻
Clock In/Out			O Clock In			Approval	1	1-2 of 2 entries Per p					
Service Name		F	Personal Care			Assessments							
Status	Status Active		ctive										
Start Da	Start Date		2018-08-08			Medicatio	Medication						
Projected End Date													
Frequen	су					Client Fo	rms						
Report			Choose A Report Type			Infusion							

Submitted forms will appear in:

- The Client Forms tab (previously Reports) on the dashboard.
- The Client Forms tab under Care Documentation on the client profile.
- The Forms tab (previously Reports) on employee profiles.
- The Facility Forms tab (previously Facility Reports) on facility profiles.

You can print, email and edit unapproved forms from any of these places.

WEB: FORMS 2.0



APPROVING FORMS

Like in Forms 1.0, you must have access to the list of all form submissions under the Client Forms dashboard tab to approve forms. All the same status options exist in Forms 2.0 as in Forms 1.0.

FORMS 1.0

Live D	ashboard	Visit Reports Reports Client Intak	Data Exploration	Tasks								
		• • • • • •										
✓ Ap	oprove All	Metrics										
All C	Client Groups	All Report Types Unapproved	Date From 🛱 D	Filter by Cl	ient 🗎 Filter by e	employee Se	arch	Filter				
	ID	Туре	Date	Reported by	Account		Approved by	Approvelon				
	#7699	A sample report	2020-05-20 2	3:10:35 Cory Gibbens	Elle Woods			- Un	approved			
	#7698	A sample report	2020-05-20 2	3:05:43 sabah c	Elle Woods			Un	approved -			
	#7696	485	2020-05-11 1	7:09:20 Administrator	Premium A-Team	1		Un	approved 👻			
	#7695	/isiting Angels - Assessment Form	9 2020-05-05 1	0:33:59 Chase Potter	Alieth Allen			Un	approved -			
	#7692 (Counselling Admission	9 2020-04-29 1	5:07:42 Merline St-Marl	k Americano			Un	approved 👻			
	#7690	Health Card	2020-04-29 1	4:26:11 Caina Souza	Renny Visser			Un	approved -			
				FOR	MS 2.0							
	Live Dash	board Visit Reports Client Forms	s Data Exploratio	n Telehealth Dashb	ooard Tasks							
	Client	Forms										
								~				
		Unapproved ×							Gerrics	 Approv 		
	ID Form 6335 01 Pain Assessment Form 6331 Personal Care Flow Sheet		Submitted on	Client/Facility	Submitted by	Status	Approved by	Approved on	Background	Job		
			05/21/2020 12:24	PM Taylor Swift	An Employee	Unapproved	-	-	-	View		
			05/21/2020 10:13	AM Achal Corson	Administrator	Unapproved	-	-		Approv		
										Email		
	6329 test_comment_box_character_limitation		05/14/2020 05:11	PM Bob Marley	Administrator	Unapproved	-	-	-	Print		
	6328	Nikki test for mandatory fields	05/13/2020 11:23	AM Alieth Allen	Joey Fatone	Unapproved	-	-	-	View		
					1			1	1			
		01 Pain Assessme	nt Form for 1	aylor Swift (6	335)							
		Charles 11NL		N								
		Status	APPROVED &									
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pproved, vo	ou m	ust										
ct View and	1 tho	n										
	i the					0	1 Pain As	sessment For	m			
the status.	•			Client	Ge	nder		Submitted by		-		
				Date of birth	Dh	one number		Submitted on		_		
				02/03/1981	Ph	one number		2020-05-21 12	·24·14 (FDT)			