WEB: FORMS 2.0

ADDING FORMS

Settings > Form Settings > Add Form

FORMS 1.0

FORMS 2.0

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

FORMS 2.0

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.**

WEB: 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
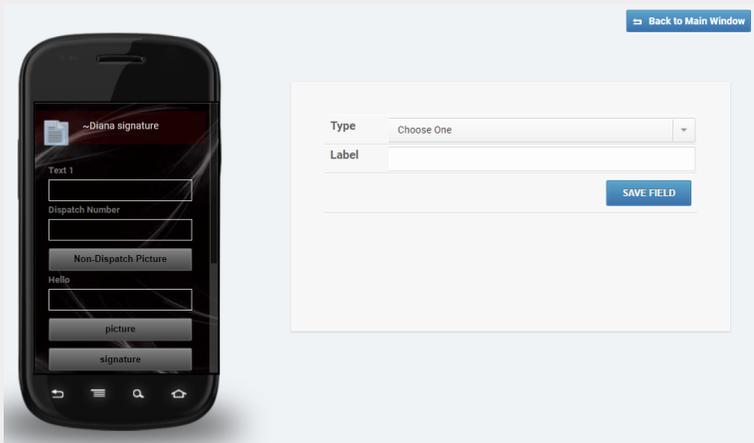
FORMS 2.0
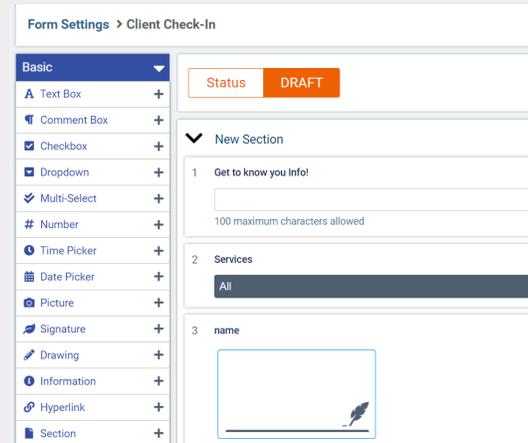
Form builder allows you to design your form using a variety of different form components to create fields and sections. You add fields to the form by dragging and dropping the components on the left into the body of the form.

ADDING FORMS FOR A CLIENT

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

FORMS 1.0
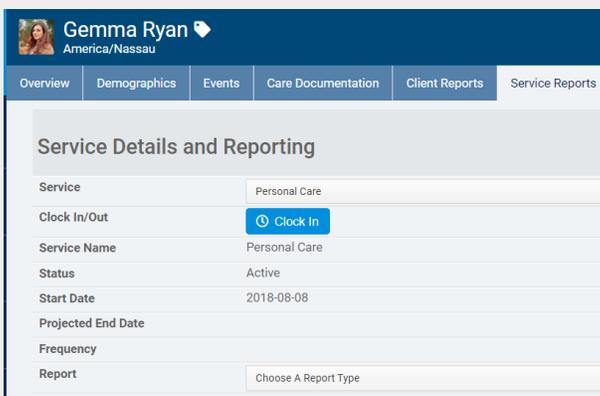
FORMS 2.0
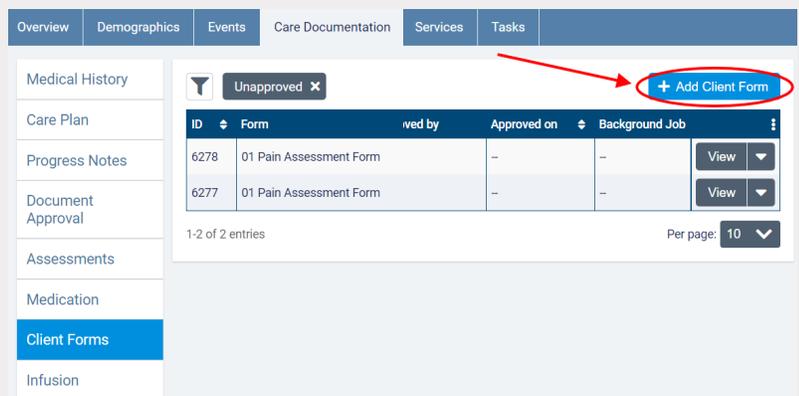
Submitted forms will appear in:

- 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

FORMS 2.0

Note: To change a form's status to an option other than Approved or Unapproved, you must select View and then edit the status.