

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.

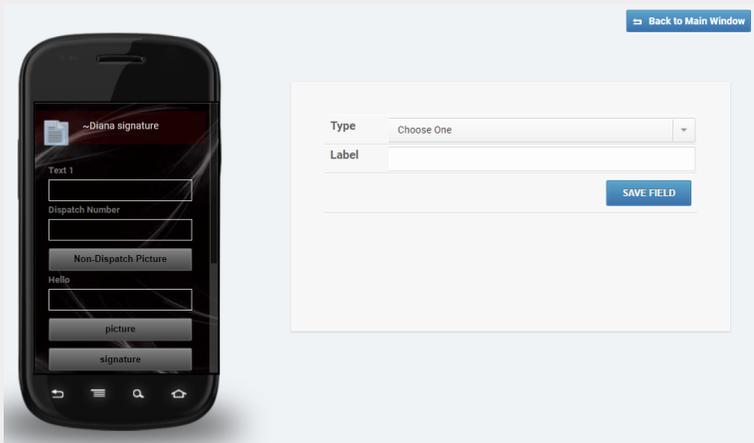
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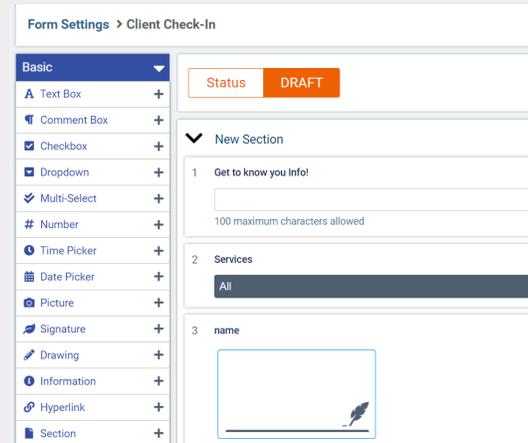
BUILDING FORMS

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



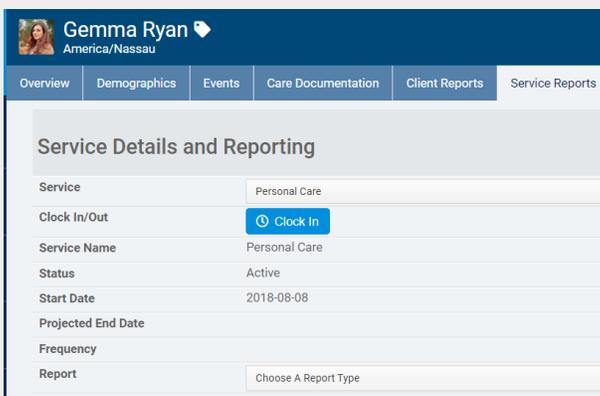
Form builder allows you to design your form using a variety of different form components to create fields and sections. You add fields to the form by dragging and dropping the components on the left into the body of the form.

ADDING FORMS FOR A CLIENT

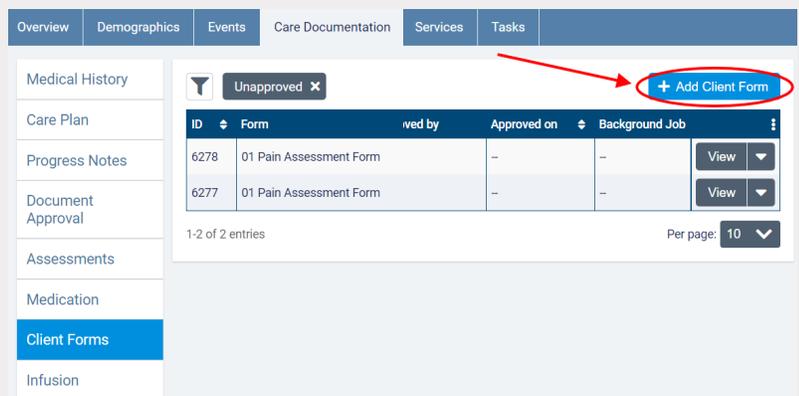
Client Profile > Care Documentation > Client Forms > Add Client Form

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.

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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

The screenshot shows the Forms 1.0 dashboard with a table of form submissions. The 'Approve All' button is circled in red, and the 'Unapproved' status in the table is also circled in red. A red arrow points from the 'Approve All' button to the 'Unapproved' status.

ID	Type	Date	Reported by	Account	Approved by	Approved on	Status	View
#7699	A sample report	2020-05-20 23:10:35	Cory Gibbens	Elle Woods			Unapproved	View
#7698	A sample report	2020-05-20 23:05:43	sabah c	Elle Woods			Unapproved	View
#7696	485	2020-05-11 17:09:20	Administrator	Premium A-Team			Unapproved	View
#7695	Visiting Angels - Assessment Form	2020-05-05 10:33:59	Chase Potter	Alieth Allen			Unapproved	View
#7692	Counselling Admission	2020-04-29 15:07:42	Merline St-Mark	Americano			Unapproved	View
#7690	Health Card	2020-04-29 14:26:11	Caina Souza	Renny Visser			Unapproved	View

FORMS 2.0

The screenshot shows the Forms 2.0 dashboard with a table of form submissions. The 'Approve All' button is circled in red, and the 'Approve' option in the table's dropdown menu is also circled in red. A red arrow points from the 'Approve All' button to the 'Approve' option.

ID	Form	Submitted on	Client/Facility	Submitted by	Status	Approved by	Approved on	Background Job	View
6335	01 Pain Assessment Form	05/21/2020 12:24 PM	Taylor Swift	An Employee	Unapproved	--	--	--	View
6331	Personal Care Flow Sheet	05/21/2020 10:13 AM	Achal Corson	Administrator	Unapproved	--	--	--	Approve
6329	test_comment_box_character_limitation	05/14/2020 05:11 PM	Bob Marley	Administrator	Unapproved	--	--	--	Email
6328	Nikki test for mandatory fields	05/13/2020 11:23 AM	Alieth Allen	Joey Fatone	Unapproved	--	--	--	Print
									View

01 Pain Assessment Form for Taylor Swift (6335)

The screenshot shows the form details page for '01 Pain Assessment Form for Taylor Swift (6335)'. The status is 'UNAPPROVED'. A dropdown menu for 'Verification' is open, showing 'PM' selected. A red arrow points from the 'Approve' option in the table above to the 'PM' option in the dropdown menu.

Submitted by An Employee

d1e60cd9-fb83-451e-aa57-e4eef165020a.pdf 1 / 1

01 Pain Assessment Form

Client Taylor Swift	Gender	Submitted by An Employee
Date of birth 02/03/1981	Phone number	Submitted on 2020-05-21 12:24:14 (EDT)

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