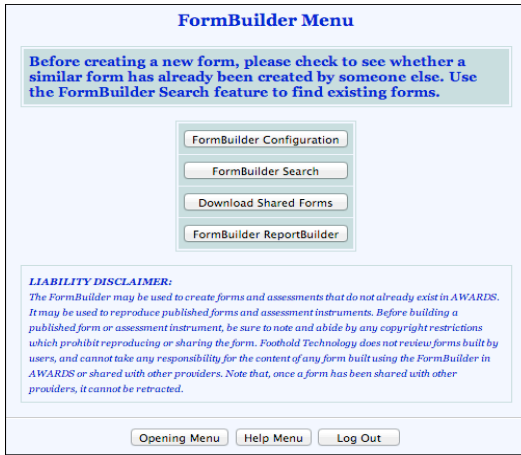# The FormBuilder

AWARDS INSTRUCTION SHEET

The FormBuilder is a powerful AWARDS feature, located in the Outcomes module, which enables users to build their own forms and assessment instruments (for the collection of both client and employee data), as well as to create reports based on the fields in those forms. Key components of the FormBuilder, all accessed from the central menu page shown here, are as follows:

FormBuilder Menu

Before creating a new form, please check to see whether a similar form has already been created by someone else. Use the FormBuilder Search feature to find existing forms.

> [FormBuilder Configuration]
> [FormBuilder Search]
> [Download Shared Forms]
> [FormBuilder ReportBuilder]

LIABILITY DISCLAIMER:
The FormBuilder may be used to create forms and assessments that do not already exist in AWARDS. It may be used to reproduce published forms and assessment instruments. Before building a published form or assessment instrument, be sure to note and abide by any copyright restrictions which prohibit reproducing or sharing the form. Foothold Technology does not review forms built by users, and cannot take any responsibility for the content of any form built using the FormBuilder in AWARDS or shared with other providers. Note that, once a form has been shared with other providers, it cannot be retracted.

[Opening Menu] [Help Menu] [Log Out]

- **FormBuilder Configuration** - Enables users to create and update forms.

- **FormBuilder Search** - Enables users to search for any phrase or keyword in forms, including in form names, individual form fields, or form sections. Searches can be conducted within forms on the local database, and in the shared forms library.

- **Download Shared Forms** - Enables users to download forms that other providers have consented to share.

- **FormBuilder ReportBuilder** - Enables users to run reports on the data entered in existing forms and, when applicable, to see a historical overview of form values.

REQUIRED PERMISSIONS

Access to the FormBuilder is granted by Foothold Technology to individual users. Prior to be granted that access, the users must successfully complete online FormBuilder training, including a quiz. (For more information on that training, please see Online Help.) Users who have been granted access to the FormBuilder must also have the following permissions in order to use it

- **Program Chart Access** – You must have chart access permission to a program in order to work with its forms and/or make forms available to it. If a form was created by another users for a program to which you do not have chart access, you will not be able to see that form within the FormBuilder.

- **Data Entry / Access** – You must have the "Display Any Chart Records Buttons" and "Display Chart Records Outcomes Button" data entry/access permissions in order to access the Outcomes module in which the FormBuilder is located.

Users who will not be creating or maintaining forms but who will be generating reports from form contents using the FormBuilder ReportBuilder feature explained on page 24, must also have access to the Outcomes module as well as chart access to the program(s) for which the form report is to be generated.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the tools mentioned above to complete common FormBuilder tasks. Specific topics covered are:

- **Building a Form** - Create a new form from start to finish.

BUILDING A FORM

New forms are built using the FormBuilder Configuration tool.

When preparing to use this tool, please keep in mind that the FormBuilder was not intended to be used to create forms for functions that already exist as AWARDS features. For example service plans, because of their complexity and regulations regarding the timing of their execution, are not good candidates to be built from scratch using the FormBuilder. If you have questions or concerns about any existing AWARDS functionality, please speak with your Senior Project Manager before using the FormBuilder in relation to that functionality.

We also encourage you to work in general with your Senior Project Manager when deciding which forms to build. They can help you determine whether a similar form:

▪ Has already been created by someone else – A form meeting your needs may already exist in your database or be downloadable from another agency's database. If such a form is found you can then make changes to it or clone it as needed. (In addition to using your Client Services representative as a reference for locating existing forms, you can also use the FormBuilder Search tool.)

▪ Exists as a built-in AWARDS form – In the event that a built-in AWARDS form contains all but a few of the pieces of information you want to track, do not create a new form. Your Client Services representative can look into the feasibility of adjusting the existing form to meet your needs, or can explain how you can best fit your processes to that form.

To build a new form, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **FormBuilder Configuration**. The *FormBuilder – Form Configuration* page is displayed. This page contains an index of all existing forms, as well as an option to add a new form.

4. At the bottom of the form index, click **Add New Form**.

The *Form Configuration* page is displayed.

Form Configuration

Each of the three tabs on this page include some required (*) fields and options.
All required information must be entered during the initial portion of the form configuration process,
after which time the "NEXT" button can be clicked to move on to the creation of the form's fields.

| 1. General | 2. Programs | 3. Sections |

- ***What is the Name of the form?:**

  Maximum of 35 characters allowed. There are 35 characters remaining.
- **How often will this form be administered?:**
- **Can this form be shared with other providers?:**
- **Where will the new form be located?:**
- **Which Domain does your form best fit into?:**
- **Which population is this form best suited for?:**
- **Which State does this form apply to?:**
- ***Is this form a Standardized Published Assessment Instrument?:**
- **What is the version number of this form?:** 1.0
- **When displaying this form in report mode, display textarea content as originally entered?:** No

NEXT | FormBuilder Menu | Opening Menu | Help Menu | Log Out

By default the first of the three form configuration tabs, "General," is open on this page. It is used to identify and categorize the form.

5. In the * **What is the Name of the form?** field type a name for the form. The name entered here is used to identify the form throughout the FormBuilder and in AWARDS, so be sure that it clearly indicates the usage/content of the form.

    When entering the form name, please keep in mind that:

    -   *Form names are limited to 35 characters. (As you type the name of the form the number of characters remaining is displayed beneath the form name field.)*

    -   *Qutation marks – single (') or double (") - should never be used in the form name, as it will cause the form to save incorrectly. Apostrophes (') when used alone and not as quotation marks can be used without a problem. For example,* Client's Form *is an acceptable form name, but* 'Client's Form' *is not.*

    -   *If you will be placing the form under Outcomes as a Charting Event, the form name must be unique from all other forms in the same location.*

6. Click the **How often will this form be administered?** drop-down arrow and select one of the available options to indicate how frequently the form being built will be administered to clients:

Daily	Weekly	Bi-Weekly	Monthly	Quarterly
Annually	Bi-Annually	Ongoing		

7. The **Can this form be shared with other providers?** option allows you to share a complete form with other agencies using AWARDS. Because you should only share a COMPLETE form, leave this option blank at this time. If, upon completing the form, you would like to share it, you can do so using the instructions provided under "Sharing or Downloading a Form" beginning on page 21.

8. Click the **Where will the new form be located?** drop-down arrow and select one of the following to indicate where in AWARDS the new form will be located:

The majority of form locations are used to collect client-specific data and are associated with individual client records. If you are creating a form to be used for the collection of employee-specific data instead, be sure to select one of the locations that specifically references "Employee."

- **Discharge – to be included on the process discharge form –** When this location is selected, an "Include" option is available on the client selection page when processing discharge in data entry mode. When a form is selected there and the user continues the data entry process, the selected form drops into the discharge form at the bottom of the page. Upon entering data into the form, that data appears in report mode, and the "Include" selection becomes read-only for the client's discharge record, preventing the inclusion of additional forms.

  IMPORTANT! For best results when using this form location, it is strongly recommended that the form be simply designed and limited to a single section, without buttons to other areas of the application. Doing so keeps the form and overall data entry process more manageable.

- **Employee – as a button on the Human Resources Menu –** When this location is selected, a button for the form is displayed on the *Human Resources Menu* page. When the form button is clicked, a menu page is displayed on which an employee and date range are specified. The user is then presented with a form index for the selected employee and given the opportunity to complete a new form, or to choose an existing form that was administered with the specified date range.

  When an employee has existing forms displayed on the form index, each is listed with the date and time at which the form was administered. The index also includes a column for each of the first three non-formatting fields from the form and their values for the corresponding date and time.

- **Employee – as a tab on the staff information form –** When this location is selected, the form is located as an additional tab within each employee's Staff Information record in the Human Resources module, and can be found there in both data entry and report modes.

  IMPORTANT! There can only be one FormBuilder form with this location at a given time.

- **Employment – as a button on the Jobs menu** – When any of these four locations is selected a button for
- **Medical – as a button on the Medical menu** – the form is displayed on the listed menu page. (The *Jobs*
- **Services – as a button on the Services menu** – *Menu* page is seen when using the Employment module
- **Discharge – as a button the Discharge menu** – Jobs feature. The other menus are those seen when initially accessing the listed module.) When the form button is clicked from the selected location, a form menu page is displayed on which a client and date range are specified. The user is then presented with a form index for the selected client and given the opportunity to complete a new form, or to choose an existing form that was administered within the specified date range.

  When a client has existing forms displayed on the form index, each is listed with the date and time at which the form was administered. The index also includes a column for each of the first three non-formatting fields from the form and their values for the corresponding date and time.

  Forms located in the Employment, Services, Discharge, and Medical modules are not linked to a chart event, but a history is kept of completed forms so that you have the flexibility to administer them at whatever frequency you see fit. An exception to this is found with forms composed totally of dynamic sections and/or dynamic text fields. A history is not kept of such forms because they act as an entry point into different portions of a client's record rather than a place to enter data for a specific point in time.

- **Group Notes – as an option to be included on a group note –** When this location is selected an "Include" drop-down option is added to the group notes index for that program in data entry mode. Included in that drop-down are all forms for the program for which group notes is the specified location. When a form is selected there and the user continues the data entry process, the selected form drops into the group note

entry page and is available for data entry. Any information entered on the included form is also displayed with the group note in report mode.

IMPORTANT! For best results when using this form location, it is strongly recommended that the form be simply designed and limited to a single section, without buttons to other areas of the application. Doing so keeps the form and overall data entry process more manageable.

▪ **Incidents – to be included in Incident Reports** – When this location is selected an "Include" drop-down option is added to the incidents index for that program in data entry mode. Included in that drop-down are all forms for the program for which incidents is the specified location. When a form is selected there and the user continues the data entry process, the selected form drops into the initial incident report data entry page and is available for data entry. Any information entered on the included form is also displayed with the incident in report mode.

▪ **Intake/Admission – as a link on client intake forms** – When this location is selected a "Client Name – Forms/Assessments" link is displayed on client intake forms *after* intake or admission is processed. Clicking the link expands/hides an alphabetical list of intake-located forms for the program, from which any form can be opened in data entry mode by clicking its name.

This form location cannot be used for Nightly Emergency Shelters / Emergency Drop In programs, or for Outreach programs.

▪ **Listed as a Charting Event, available under Outcomes** – When this location is selected an event representing the form is scheduled for a client using the Services module Charting Timetable feature. The form itself is then accessed for data entry using the Assessment Data feature in the Outcomes module.

When using this location, please keep in mind the following:

– *You must contact your Foothold Client Services representative or the Foothold Help Desk to have the form added to the list of events available in the charting timetable. When submitting your request, be sure to indicate which program type(s) the event should be available for.*

– *Forms placed in this location must be named uniquely from any forms already listed as chart events.*

– *Forms included in the list of chart events will generate chart review reminder messages. These messages are sent 3 weeks / 21 days, 2 weeks / 14 days, and 1 week / 7 days prior to the form's due date. Once the due date has passed, a reminder is sent every third day until the form's done date is entered in the charting timetable.*

▪ **Medical – as an option to be included on the Medical Appointment Form –** When this location is selected an "Include" drop-down option is added to the appointment forms index for that program in data entry mode. Included in that drop-down are all forms for the program for which Medical Appointment Form is the specified location. When a form is selected there and the user continues the data entry process, the selected form drops into the appointment form entry page and is available for data entry. Any information entered on the included form is also displayed with the appointment form in report mode and when using SHOW FORM to access a printable version.

IMPORTANT! For best results when using this form location, it is strongly recommended that the form be simply designed and limited to a single section, without buttons to other areas of the application. Doing so keeps the form and overall data entry process more manageable.

▪ **Profile – as a link at the top of client face sheets** – When this location is selected a "Client Name – Forms/Assessments" link is displayed on the top of client face sheets. Clicking the link expands/hides an alphabetical list of face sheet-located forms for the program, from which any form can be opened in data entry mode by clicking its name.

When using this location, the form does not save a history of its content if responses are edited. As a result, this form location should not be used for forms that may need to be filled out more than once when access to previous responses will be necessary, and it is only available if the question "How often will this form be administered?" is set to "Ongoing."

- **Progress Notes** – **as an option to be included in a progress note** – When this location is selected an "Include" drop-down option is added to the progress notes data entry settings page. Included in that drop-down are all forms for the program for which progress notes is the specified location. When a form is selected there and the user continues the data entry process, the selected form drops into the note entry page above the note text box and is available for data entry. Any information entered on the included form is also displayed with the progress note in report mode.

  Any FormBuilder forms for which progress notes is the specified location will be available for data entry multiple times per day per client, as long as the notes the form is attached to are distinct. For example, if a single staff person writes two notes for a given client on a single day, those notes would need to have different clock times in order to be distinct and allow for the form to be completed more than once for that day.

- **Services – to be included on the Service Plan Coversheet –** When this location is selected, an "Include" column is available on the service plan index for that program in data entry mode. When a form is selected there for a plan and the user continues the data entry process, the selected form drops into the top of the coversheet page. Upon entering data into the form, that data appears in report mode, and the "Include" selection becomes read-only for that plan, preventing the inclusion of additional forms. Additionally, once data is entered into the included form, if the same form is selected for the next plan, that form's data may be pre-populated with what was entered on the previous plan, depending on how the **Pre-populate form data with** option is configured in step 16. (When in effect, pre-population only applies when data was entered in the form in the previous plan, not any plans prior to that.)

  IMPORTANT! For best results when using this form location, it is strongly recommended that the form be simply designed and limited to a single section, without buttons to other areas of the application. Doing so keeps the form and overall data entry process more manageable.

9. Click the **Which domain does your form best fit into?** drop-down arrow and select one of the available options to indicate the basic assessment area ("domain") to which the form applies:

Education/Employment	Housing Retention	Living Skills/Functioning
Medical/Physical Health	Mental Health Status	Misc. Client Information
Quality of Life	Satisfaction/Assessment of Care	Substance Use

10. Click the **Which population is this form best suited for?** drop-down arrow and select one of the available options to indicate the population to which the form is best suited:

Aging	Children/Youth	Families
HIV/AIDS	Homeless	Mental Heath
Developmentally Disabled	Physically Disabled	Substance Abuse
Violence/Trauma Victims	Other/Multiple Service Areas	

11. Click the **Which state does this form apply to?** drop-down arrow and select the abbreviation for the state the form applies to. If the form is applicable to more than a single state, scroll down to the bottom of the selection list and choose "National."

12. Click the * **Is this form a Standardized Published Assessment Instrument?** drop-down arrow and select "Yes" or "No" to indicate whether this form is a Standardized Published Assessment Instrument.

13. Click the **What is the version number of this form?** drop-down arrow and specify which version of the form you are working on. The default for newly created forms is "1.0."

14. Click the **When displaying this form in report mode, display textarea content as originally entered?** drop-down arrow and select "Yes" or "No." When "Yes" is selected, any extra blank lines or spaces entered by the user are retained when the form's content is displayed in report mode; otherwise, the default is "No" and all extra lines or spaces used as text breaks are removed, displaying the content in a single piece.

15. Click the **Allow option to copy over preexisting form data at Intake?** drop-down arrow and select "Yes" or "No" to indicate whether data entered in this form for a client in one program can be copied over to the same form for the same client in a different program.

    This option is only available when the form's location has been set to "Intake/Admission" or "Profile." When it is turned on, a Copy FormBuilder Data button becomes available on the client's intake record after intake or admission has been processed. For more information on copying FormBuilder data, please see AWARDS Online Help.

16. If you have specified a form location that allows a form to be filled out multiple times, a **Pre-populate form data with?** option is available at the bottom of the page. When this option is set, any newly opened form will display data from a previously completed instance of the form (assessment) rather than a blank version of the form.

    To use this option, click the Pre-populate drop-down arrow and make one of the following selections to specify which data pre-populates the form (choices are based on the location selected in step 8):

    ▪ **Latest Data –** This option is available when the form is located on a module menu page (Discharge, Employee, Employment, Medical, or Services). When selected, data from the immediately preceding instance of the form (if available) will pre-populate the new instance of the form when it is opened.

    ▪ **Latest Scheduled Assessment –** This option is available when the form is located under Outcomes, listed as a Chart Event. When selected, data from the immediately preceding scheduled assessment (if available) will pre-populate the new assessment when it is opened.

    ▪ **Latest Completed Assessment (Marked as Done) –** This option is available when the form is located under Outcomes, listed as a Chart Event. When selected, data present in the last completed (marked as done) assessment (if available) will pre-populate the new assessment when it is opened.

    ▪ **Latest Scheduled Review –** This is the default when the form is located on Service Plan Coversheets. It indicates that such forms are automatically pre-populated with data from the latest scheduled review, if present. If you would instead like to have the form start with no data when it is added to a service plan, regardless of whether it was used on the previous plan, leave the Pre-populate option **blank** instead.

    This option is set to **N/A** for all form locations other than those specifically listed above.

    IMPORTANT! In all cases when a pre-populate option is specified, a client's program history will impact which specific data pre-populates the form:

    ▪ *When a client has multiple consecutive stays in the same program, the form will pre-populate from a previous program stay if there is no data found for the form during the current stay.*

    ▪ *When a client has multiple program stays in various programs (regardless of whether or not they are concurrent), form data will NOT populate across program stays.*

    When you have chosen a pre-populate option, you may wish to include on the form an instructional field that makes users aware that existing data has been dropped into the form. Further, you may choose to recommend in those instructions that they should review all form content and make changes as needed.

When a new form is viewed containing pre-populated data, AWARDS will display a message at the top of the new form listing where the information is being pulled from. This message will not display once the form is completed and saved.

17. If you are creating a *client* form, click the **Programs** tab. The *Form Configuration* program selection page is displayed, and contains a check box for each program you have chart access to. Continue with step 18.

    If you are creating an *employee* form, the Programs tab is not relevant and is therefore inaccessible. Skip ahead to step 19.

18. Click the check box next to each program for which this form should be available (at least one must be selected), or click **Check All** to make it available to all programs.

19. Click the **Sections** tab.

    The *Form Configuration* section information page is displayed.

20. As with other areas of AWARDS, forms built with the FormBuilder can be broken into sections, each of which can be updated separately. Configure the fields and options on this tab as follows to set up your form's sections:

    At least one section is needed in order to proceed with the form creation process. By default a single section is entered for you. Change the label and characteristics of that section as needed.

    ▪ **Section Label -** In this field enter the form section's name.

    ▪ **Button Label -** To use the section label name in the update button for this section (for example "Update [Section Label] Information"), click this drop-down arrow and select "Yes." If "No" is selected, the section name will not be shown on the update button, which will instead have the form name (for example "Update [Form Name] Information").

    ▪ **Fields Per Row -** In this field type the number of fields to be available per row in this section. For example, if "4" is entered here there can be no more than four fields in any row of the section.

    Repeat this step until up to eight form sections have been added. If all sections have been added as needed, continue with step 21. If additional sections are needed, instead click **NEXT** to save your work, and then circle back around to the Sections data entry tab (FormBuilder Menu > FormBuilder Configuration > Click the form name > Sections). There you will be provided with space to enter up to seven additional sections for a total of 15.

    Please keep in mind that for best results when the form location is "Services – to be included on the Service Plan Coversheet" or "Discharge – to be included on the process discharge form," it is strongly recommended that the form be simply designed and limited to a single section, without buttons to other areas of the application.

When the form location is "Progress Notes – as an option to be included in a progress note" the form is not broken into distinct sections with separate update buttons, regardless of what is specified here. Instead the complete form is automatically displayed during note writing.

21. Click **NEXT**. The *Update Field Details per Section* page is displayed.

    This page contains a list of all form sections, each of which can be expanded or collapsed to view or hide the fields it contains.

22. Click the ⊞ next to a section to expand and add fields to it.

23. Click the **Add New Field to this section** link. The *Add a new field* page is displayed.

24. In the **Field Label** text box, type the label that should be shown for this field in the form. Above the text box are formatting options that can be used to adjust the appearance of your label and/or spell check it as needed.

    For a brief description of each formatting option, hover your mouse pointer over the individual icons in AWARDS.

    Note when using the spell check option that the icon must be clicked once to show any misspelled words in the text box in red. In order to see the spell check suggestions, you must then click directly on the misspelled word.

25. In the **Field Description** text box, type any hints that may be helpful to users as they work to complete the form. The description entered here is displayed to the user accessing a form when he/she moves his/her mouse cursor over this field.

26. Click the **Field Type** drop-down arrow and select the type of field being added.

    When a field type is chosen the page may refresh to show additional field configuration options related to that selection. At this time, also configure those fields and options as needed.

    For detailed information on each of the available field types, including instructions on use of any type-specific options please see "Understanding FormBuilder Field Types" on page 11 of this document. Basic field type definitions can also be accessed in AWARDS by clicking the magnifying glass icon. 🔍

27. Click the **Required** drop-down arrow and select "Yes" or "No" to indicate whether or not an entry in this field will be required in order to save this form during the data entry process.

28. If the field being entered will only be required based on a specific response to another field on the form, configure the following fields and options as specified:

    ▪ **Conditionally Required –** Click this drop-down arrow and select the name of the existing field on which the requirement for this new field will be based.

This option can only be selected if there is at least one other field in the form section. In such cases, the Conditionally Required selection list includes those fields previously added to that form section.

▪ **Response to the above listed field –** In these fields, specify one or more responses that, if entered in the conditionally required selection, will cause the new field to be required. For example, if field 1 is "Hospitalized this year?" and field 2 is "If so, which hospital?" these options can be used to set up field 2 so that it is required if the answer to field 1 is "yes." To do so you'd make "Hospitalized this year?" the conditionally required selection, and enter "yes" in the response field when creating field 2.

Initially a maximum of five responses can be entered. Upon saving the field and re-opening it, you have the option to add five more. If no responses are entered, the absence of any data in the conditionally required field triggers the requirement of this new field.

29. To include the field as a variable in the ReportBuilders available throughout AWARDS, and/or to impact its characteristics as a variable in such reports and the FormBuilder report, configure the following fields and options as specified:

▪ **Available on Related ReportBuilders –** Click this check box to include the field as a variable for relevant ReportBuilders, based on where the form is set to display. (For example, if a form's location is Progress Notes and this option is selected, the form field will be available for inclusion when using the Progress Notes ReportBuilder.) When this option is checked the field will also be available for inclusion when using the Demographics ReportBuilder (with the exception of fields from employee and group note forms).

This option is not available until a field type is chosen in step 24. At that time it is displayed as long as the field type selection is not "dynamic section," "dynamic text field (read-only)," or "dynamic text field."

When determining whether a field should be included as a ReportBuilder variable, please keep in mind that if more than one value exists for that field during the date range used when running the report, only the latest value is included in the report contents.

▪ **Report Field Label –** In this field, enter the label to be used for this field on ReportBuilder Reports and/or in the FormBuilder Reports tool.

Whenever possible, label the field uniquely so that it can be differentiated from other ReportBuilder variables that may have the same or a similar name as that of your form field.

30. If necessary, click the **Advanced Settings** link at the top of the page to configure these additional settings for the field:

▪ **Field Size –** Specify the maximum width of the new field. This option is only available when the field type is applicable; for example, when it is text, phone number, date, or textarea.

▪ **Field Width Per Row –** Specify the number of columns the field should occupy. This is directly related to the "Fields Per Row" specified for this section on the sections tab during the form configuration process. (For example, if the section has 4 fields per row, the maximum field width each row could occupy would be 4.) If no field width is specified, the field automatically occupies one column. As new fields are added they automatically fill all of the available columns in each row.

Only the number of columns available on the row where the field sits show up in the "Field Width Per Row" selection list. For example, if the section has 4 fields per row and the current row already has two fields in it, the third field being added may be 1 or 2 columns wide. If it needs to occupy more columns than are available for selection on the current row, one of the fields on that row must be expanded to occupy enough columns to fill the row, allowing the new field to begin on a new row.

- **Default Value –** This option is used to specify an initial value that will automatically populate the field; for example, today's date when the field type is "date," or the username of the person administering the form if the field type is "text." Available default value selections include all fields presently available on the Demographics Report for all programs. An "Other" selection is also available for the purposes of specifying your own default value.

- **Code –** If the field type is "Checklist," "Radio," or "Selection List," an alphanumeric code can be associated with each specified value for the list. If you choose to enter a code here for each value, those codes are automatically saved behind-the-scenes when a user selects the corresponding values on the form during the data entry process. Both the code and value can then be included in reports.

  Fields for which both codes and values have been specified during FormBuilder configuration will be listed twice on the settings page for the Assessments Report and related ReportBuilders – once as [fieldname] - Value, and once as [fieldname] – Code. Using one or both of these selections will enable users to view reports with the preferred data type(s).

31. Click **NEXT** to save the field information and return to the *Update Field Details per Section* page.

32. To see a preview of the form now or at any time after at least one field has been added, click the preview icon on this page.

33. Repeat steps 21 through 31 as needed until all fields have been added to the form's various sections.

    After the form's first field has been entered, subsequent Add a Field *pages for that form will have a **Default to Last Saved** link near the top of the page. Click that link if the new field should "inherit" all of the settings of the most recently saved field.*

34. If the location of the form was set to "Listed as a Charting Event, available under Outcomes" in step 8, you must now contact your Foothold Client Services representative or the Help Desk and request that the form be added to the list of chart events available in the Services module Charting Timetable feature. When submitting your request, be sure to indicate which program type(s) the event/form should be available for.

    If one of the other locations was chosen for the form, this step is not necessary. In all other cases the form will automatically be available from within the specified module/feature.

The process of building a form is now complete.

UNDERSTANDING FORMBUILDER FIELD TYPES

Each field on the forms you create and maintain must have a field type selected for it. The field type selection determines how the field looks on the form, and whether it will be automatically populated with data. A definition for each available field type is provided here. These definitions can also be accessed in AWARDS by clicking the magnifying glass icon on the add or update a field pages.

CHECK BOX

Displays a single check box labeled with the value entered as the "Field Label."

CHECKLIST

Displays a series of check boxes where one or more of the check boxes can be checked off during the form data entry process. When this field type is selected, the page refreshes. In the **Field Options** fields that are then displayed, enter the list of check boxes to be used. If necessary, click the corresponding **Show "Other" option and text fill in for "other" detail** check box as well.

Initially a maximum of 26 items can be entered. Upon saving the field and re-opening it, you have the option to add 14 more. An additional 14 items can be added after saving and re-opening the field again.

By default, each of the specified check boxes is displayed on a single line in the form (wrapping onto multiple lines as needed). If each check box should instead be displayed on a separate line, click the **Display each field option on a new line** check box.

Keep in mind that using the Advanced Settings described in step 30 of the form configuration process, a code can be associated with each of the listed checklist options. When codes have been associated with each value, those codes are automatically saved behind-the-scenes when a user selects the corresponding values on the form during the data entry process. The code and/or value can then be included in reports as needed.

CLOSE TABLE TAG

Closes the current open table. This field type is used to visually separate different parts of the form.

COMPUTED FIELD

Completes a computation of a specified type for the responses in other fields and displays the read-only value in report mode.

Only one computation can be made in a single field. If you would like to perform multiple computations, you must create a separate field for each.

When this field type is selected, the page refreshes to display the following additional settings:

▪ **Computation Type –** Click this drop-down arrow and select the type of computation to be used. Available options are:

– **COUNT –** Calculates the number of times a certain response is given to the selected computation items on the form, for example counting the number of "yes" responses to a series of questions.

– **DIFFERENCE –** Subtracts the value of one form field from another.

   When this computation type is used, any fields without values in them will act as zeroes. Additionally, if the first number in the equation is less than the second number or is zero, the computed value will be a negative number.

– **PRODUCT –** Multiplies the value of one form field by another.

   When this computation type is used, any fields without values in them will act as zeroes. Additionally, if any of the field values are zero, the computed value will also be zero.

– **QUOTIENT –** Divides the value of one form field from another.

When this computation type is used, any fields without values in them will act as zeroes. Additionally, if the first value in the equation is zero, the computed value will also be zero. If the second value in the equation is zero, no calculation will be done and the computed value will be blank.

Also note that when this computation type is used, a "Round to Whole Number" option is available under Computed Fields Setup. Check off that option if you would like any computed values resulting in a decimal to be rounded to a whole number; otherwise, the value will be rounded to two places after the decimal.

- **SUM –** Adds together numeric responses to the selected computation items on the form, for example adding together the total "score" for a series of questions.

- **Computation Items –** Click **Computed Fields Setup** to configure the specifics of the computation to be performed. You'll be choosing from existing form fields of the following types:

Checklist (SUM only)	Computed Field	Decimal	Dynamic Text Field
Integer	Radio (codes/values)	Selection List (codes/values)	Text

If the computation type is set to SUM, DIFFERENCE, PRODUCT, or QUOTIENT, an "Other" option is also available for selection. When selected, a field is displayed in which a numeric value can be entered (either an integer or a decimal with no more than two decimal places) for inclusion into the computation equation.

The way in which the computed field setup options are displayed and set is based on the computation type you've chosen. For instance, you will either see an equation with multiple drop-downs that must each be set, or a checklist where selections must be made.

Configure the setup options as appropriate, and then click **Close**.

Once a form field has been selected here, you will not be able to edit that field without first de-selecting it as a computation item.

- **Computation Count Value –** Only available if "COUNT" is selected as the computation type. In this field, enter the value to be counted for the selected computation items. (For example, if you want to count the number of "Yes" responses to the selected fields, you would enter "yes" here.)

This field is NOT case-sensitive. AWARDS will count any values matching what is entered here, regardless of case.

DATE

Displays a text box, including a date picker, for entry of a date value.

DECIMAL

Displays a text field that accepts numeric values, including partial numbers where decimals are used.

DYNAMIC SECTION

This field type is not available for employee forms (those with an "Employee" location) or those located on group notes.

Displays a section of the client's chart on the form in report mode. When this field type is selected, the page refreshes to show a "Select from the following selection list" option that includes all sections available on the client's face sheet. Select one of the following from that list to indicate what type of information should be included on the form:

Allergy Information	Child Care	Diagnosis Report
Educational History	Emergency Contacts	Entitlements
Hospitalization History	Household Information	Immunizations
Income-Generating Entitlements	Initial Service Plan - Client Assessed Needs	Initial Service Plan – Goals
Insurance/Subsidized Payments Info	Job Placements	Laboratory Orders
Legal Information	Medication Detail Information	Medication Information
Misc Entitlements/Eligibilities/Subsidies	Psychotropic Medical Information	Substance Abuse Information
Support Services Contacts	Training Placements	

When reviewing the dynamic section selections, please keep in mind that:

- *The "Entitlements" selection includes all entitlement types in the section – income-generating, insurance / subsidized payments, and miscellaneous entitlements / eligibilities / subsidies.*

- *The "Child Care" and "Initial Service Plan – Client Assessed Needs" selections, while available to everyone, apply only to Tier II programs.*

- *The "Initial Service Plan – Goals" selection relates specifically to education and employment goals.*

*IMPORTANT! By default, all available information in the selected dynamic section is included on the form (with few exceptions); however, in most cases the option is available to de-select specific pieces of information to exclude them, as well as to modify the labels on included information to better meet your needs. To make such changes, click the **Modify Fields** link to the right of the section drop-down. On the dialog box that is then displayed, check/uncheck specific pieces of information to indicate which should be displayed/hidden on the form. To re-label a selected piece of information (on the form only, not at the point of origination), type a new name in the corresponding field. Click **close** to complete the modification process.*

In addition to the above-described option used for choosing which dynamic section to display on the form, two other options may also appear on the *Add/Update a Form* page when a dynamic section is added to a form:

- **Display Section Button –** When this option is checked off (which it is by default), an update button is included beneath this dynamic section on the form. When the update button is clicked, it takes the user to data entry mode for the portion of the client's chart from which the section was pulled. Once there, updates can be made to the data as needed, and after an update is made the user is automatically returned to the form. If the "Display Section Button" option is *not* checked off, the dynamic section is displayed on the form in report mode only, with no button to take the user to data entry mode.

  IMPORTANT! Use of the update button available when this option is checked directs the user away from the form being worked with. As a result, dynamic section updates should be performed BEFORE data is entered into any other fields in the same FormBuilder form section. Likewise when the form is embedded in a location such as the service plan cover sheet or discharge form; dynamic section updates should be performed BEFORE entering data on the remainder of the page, whether in the embedded form or elsewhere on the data entry page.

- **Display Household Information –** This option is included on the *Add/Update a Form* page when "Educational History," "Job Placements," or "Support Services Contacts" is selected as the section type. When this option is checked off, any information entered for the client's household member(s) in the selected section is included in that portion of the form.

DYNAMIC TEXT FIELD

This field type is not available for employee forms (those with an "Employee" location) or those located on group notes.

Displays a field from the client's chart on the form. The information in this field can be updated on the form, and the data entered will populate the same field in the client's chart. When this field type is selected, the page refreshes to show a "Select from the following selection list" option that includes available fields from the client's face sheet. Select one of the following from that list to indicate what field should be included on the form.

Charting Done Date	Charting Due Date	Documents Needed	Education Level
Homeless Cause	Homeless Duration	Primary Language	

The "Documents Needed" selection, while available to everyone, applies only to Tier II programs.

The "Charting Done Date" selection, while available for any form, will only hold a value if the form's location is the Charting Timetable, listed as a chart event.

DYNAMIC TEXT FIELD (READ-ONLY)

This field type is not available for forms located on group notes.

Displays a read-only field/data from the client's chart or the employee's records on the form (based on whether the form is client-centric or employee-centric, respectively). When this field type is selected, the page refreshes to show a "Select from the following selection list" option containing fields from the client's face sheet and including all client characteristic variables available when running the Demographics Report in the Profile module (including those placed there from FormBuilder forms). Other information, such as "Agency Name," is also available for selection from this list.

HEADER

Displays a read-only section header on the form.

HTML BR TAG

Inserts a break into the form.

INSTRUCTIONS

Displays read-only instructional text on the form. When this field type is selected, the page refreshes to display related field options. If display of this instructional text should be limited to data entry mode only – excluding it from report/printable versions of the form where it is otherwise shown by default – click the available **Display in data entry mode only** check box.

INTEGER

Displays a text field on the form that only accepts a numeric value.

LOGICAL

Displays "Yes" and "No" radio buttons of which only one can be selected at any given time.

OPEN TABLE TAG

Opens a new table. This is used with the "Close Table Tag" field type to visually separate different parts of the form.

PHONE NUMBER

Displays a text field that only accepts a ten digit number. In report mode it is formatted as a phone number.

RADIO

Displays a series of radio buttons where only one value may be selected on the form.

When this is selected as the field type, the page refreshes. In the **Field Options** fields that are then displayed, enter the list of radio button options to be used. If necessary, click the corresponding **Show "Other" option and text fill in for "other" detail** and/or **Display each field option on a new line** check boxes.

Initially a maximum of 26 items can be entered. Upon saving the field and re-opening it, you have the option to add 14 more. An additional 14 items can be added after saving and re-opening the field again.

Keep in mind that using the Advanced Settings described in step 30 of the form configuration process, a code can be associated with each of the listed radio button options. When codes have been associated with each value, those codes are automatically saved behind-the-scenes when a user selects the corresponding values on the form during the data entry process. The code and/or value can then be included in reports as needed.

SELECTION LIST

Displays a drop-down list of values where only one value can be selected from the list. When this field type is selected, the page refreshes. In the **Field Options** fields that are then displayed, enter the list of items to include in the selection list. If necessary, click the corresponding **Show "Other" option and text fill in for "other" detail** check box.

Keep in mind that using the Advanced Settings described in step 30 of the form configuration process, a code can be associated with each of the listed checklist options. When codes have been associated with each value, those codes are automatically saved behind-the-scenes when a user selects the corresponding values on the form during the data entry process. The code and/or value can then be included in reports as needed.

SIGNATURE

Displays a basic signature line on the form in report mode, intended for manual signing when the form is printed, or allows the form to be electronically signed from within AWARDS using Electronic Signatures functionality. Basic signature lines can be added to any form as needed. Electronic signatures are limited to placement on forms for the following locations only:

Listed as a Charting Event, available under Outcomes	Profile – as a link at the top of client face sheets
Intake/Admission – as a link on client intake forms	Employment – as a button on the Jobs menu

Services – as a button on the services menu	Medical – as a button on the Medical menu
Discharge – as a button on the Discharge menu	Employee – as a button on the Human Resources menu

The configuration options when adding a signature field to a form are based on the signature type you are adding – basic or electronic:

▪ **When adding a BASIC signature line:**

– **Electronic Signature** – Leave this option *unchecked* if available. (It is only displayed in the event that the form has been configured for one of the above listed locations.)

– **Enter the signature line to display on the form** – In this field, enter the signature label to be used. The default value is "Signature:_____ Date: _____."

▪ **When adding an ELECTRONIC signature line:**

IMPORTANT! As you consider the use of electronic signatures on the form you are working with, please keep in mind that e-signing a form will lock it from further edits, and once signed forms cannot be unlocked or deleted. As a result, we recommend only using e-signing in forms that do not need to be updated on an ongoing basis, such as might be the case for some face sheet forms.

– **Electronic Signature** – Check this check box.

If this option is not available, it is an indication that the form has been configured for a location other than one for which electronic signatures are available. In such cases you will only be able to add a BASIC signature line.

– **Signer Type –** Click this drop-down arrow and select the type of individual who will be signing this electronic signature line on the form. Available options are:

▪ **Client –** When selected, only the client for whom a form has been filled out can sign that form, either with staff assistance, or on his/her own with a client login (please keep in mind that the latter does not automatically grant access to all forms).

This option should not be selected when the form location is not client-based; for example, it should not be used if the location is "Employee – as a button on the Human Resources menu."

▪ **Employee –** When selected, an employee selection list is placed on the form when it is opened in data entry mode. A selection must be made from that list to enable the selected individual to sign there electronically.

▪ **Other –** When selected, someone other than a client or employee can sign the form. In order to do so, that individual must be assisted by a staff member with access to the form.

– **Signature Title –** In this field, type the title label to be placed on the form for the electronic signature.

A title is not required if the signer type has been set to "Client." If one is not entered, the signature label defaults to the terminology set up for the program behind-the-scenes – ex: client, consumer, member, etc.

– **Authority Level –** In this field, enter a description of the selected signer type's authority level. If the signer should be allowed to enter his or her own authority level information, check the corresponding **Allow signer to enter other Authority Level** check box. If an authority level is not entered and the "other" option is not checked, the signer will have default options of "I am the author and I approve this document," "I am the reviewer and I approve this document," or "This document is accurate."

– **Display –** If the date and/or time (at e-signing) should be included with the electronic signature, click the **Date** and/or **Time** check box(es), respectively.

For more information on signing electronic signature lines on forms configured with them, please refer to AWARDS Online Help.

TEXT

Displays a text line fill-in field on the form.

TEXT AREA

Displays a text area fill-in field on the form where up to 10 rows of text can be entered.

URL ADDRESS

Displays a link to a specified Web site that, when clicked from within the form, opens the site in a separate browser window. When this field type is selected, the page refreshes. In the **Field Options** field that is then displayed, enter the Web site's address (URL). Keep in mind that the URL specified here is not displayed on the form; rather, it is shown as a link named using the value entered under **Field Label**.

URL links are not included when viewing FormBuilder reports.

MAKING CHANGES TO AN EXISTING FORM

The FormBuilder Configuration tool gives users many options when making changes to existing forms. Using the functionality available there users can add to forms, change form fields and/or sections, re-arrange form content, make forms available to other programs or AWARDS-using agencies, and more.

To make changes to an existing form, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **FormBuilder Configuration**. The *FormBuilder – Form Configuration* page is displayed.

    This page contains an index of all existing forms, as well as an option to add a new form.
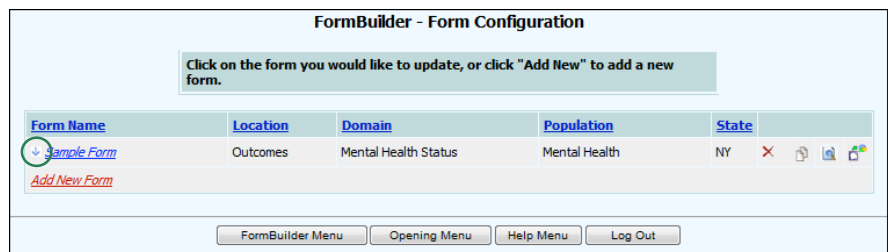
    To see at a glance which programs a form is associated with, click the arrow ⬇ *to the left of a form name in the index. A Programs pop-up is displayed. Click **Close** when you finish reviewing the program list.*

4. Click the name of the form to be changed. The *Form Configuration* general form information page is displayed with the "1. General" tab shown by default.
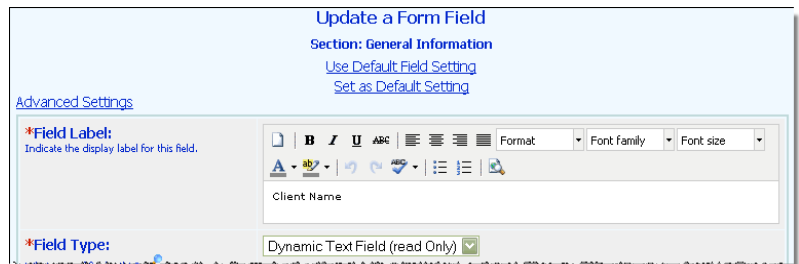
5. Make changes to the information on any of the form configuration tabs as needed. For example, on the "1. General" tab you can choose to change the location of the form in AWARDS or adjust other form configuration information such as the form name, on the "2. Programs" tab you can choose to make the form available to more or fewer programs, and on the "3. Sections" tab you can adjust or add to the form's sections.

6. Click **NEXT**. The *Update Field Details per Section* page is displayed.

    This page contains a list of all form sections, which can each be expanded /collapsed to view/hide the contained fields.

7. Next, do one or more of the following:

    ▪ **Add a Field –** To do so, click ⊞ next to a section name to expand that section, and then click **Add New Field to this Section**. The *Add a new field* page is displayed. Configure the fields and options on this page, and then click **NEXT** to save your work. The updated *Update Field Details per Section* page is displayed.

    ▪ **Change a field -** To do so, click ⊞ next to a section name to expand that section, and then click the name of the field to be changed.

    The *Update a Form Field* page is displayed.

    Make changes to the field's settings as needed, and then click **NEXT** to save your work. The *Update Field Details per Section* page is re-displayed.

    When updating a field up to three "default" options may be available on the Update a Form Field *page:*

    ▪ ***Set as Default Setting –*** *When clicked the field becomes the "default field" so that subsequently added/updated fields can "inherit" its settings.*

    ▪ ***Default to Last Saved –*** *When clicked the field "inherits" all of settings of the most recently saved field.*

    ▪ ***Use Default Field Settings –*** *When clicked the field "inherits" all of the settings of the default field.*

    ▪ **Delete a field –** To do so, click ⊞ next to a section name to expand that section, and then click the delete icon ☒ next to the field. A delete confirmation dialog box is displayed. Click **OK**. The field is deleted and the updated *Update Field Details per Section* page is displayed.

    If the form has been used for data entry and the field in question has data saved in it, it cannot be deleted (unless it is a read-only or computed field).

    ▪ **Preview the form –** To do so, click the preview icon. 🔍 A new window is opened to show you how your form will look. Close that window to return to the *Update Field Details per Section* page.

    The preview tool is also available on the FormBuilder – Form Configuration *page's form index.*

    ▪ **Re-arrange the form –** To do so, click the re-arrange icon. The *Arrange Form Layout* page is displayed. On this page the form's sections are shown in green and fields are shown in white. To re-arrange these fields and/or sections, drag-and-drop each form component to the desired location, or click the component to be moved then click one of the red arrow buttons to the right of the list to shift that component's position. (Keep in mind that the form must begin with a section.) Click **CONTINUE** to save your work. The updated *Update Field Details per Section* page is displayed.

The process of making changes to an existing form is now complete.

If the changes you made were to a form you previously consented to share, those changes are not automatically reflected in the Download Shared Forms feature. Instead, the form must be re-approved by Foothold Technology. (No action is required on your part to initiate this process.) Once re-approved, the updated version of the form replaces the original in the Download Shared Forms index. It does not, however, replace any already downloaded copies of the form residing in other providers' AWARDS databases.

CLONING A FORM

Forms can be associated with multiple programs using the "2. Programs" tab under FormBuilder Configuration. All programs associated with a form in this way see the same version of the form, even when changes are made to it.
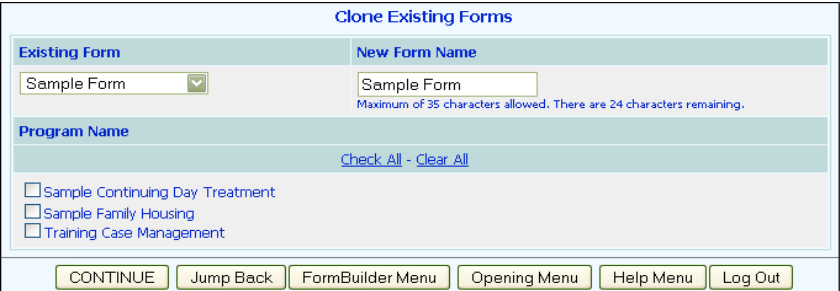
In the event that a program needs a modified version of an existing form, the form should be cloned (copied) for that program rather than simply associated with it. A cloned form can be modified by the program for which it was cloned without impacting the original version of the form in use by others.

To clone a form, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **FormBuilder Configuration**. The *FormBuilder – Form Configuration* page is displayed. This page contains an index of all existing forms, as well as an option to add a new form.

    To see at a glance which programs a form is associated with, click the arrow ⬇ to the left of the form name on the index. A Programs *pop-up is displayed. Click* **Close** *when you are finished reviewing the programs list.*

4. Click the clone a form icon 📋 for the form to be cloned. The *Clone Existing Forms* page is displayed. ➡

5. Verify that the **Existing Form** selection option is displaying the name of the form to be cloned.

6. By default, the cloned form shares the name of the existing form. To rename the cloned form, replace the value in the **New Form Name** field.

    Renaming the cloned form will make it more easily distinguishable when viewing the form index in the FormBuilder Configuration feature and elsewhere. When renaming, keep in mind that form names are limited to 35 characters. As you type the name of the form the number of characters remaining is displayed beneath the form name field.

7. Click the **Program Name** check box next to each program for which the form is to be cloned.

8. Click **CONTINUE**. The cloned form is saved and the *FormBuilder – Form Configuration* page is re-displayed.

The process of cloning a form is now complete.

SHARING OR DOWNLOADING A FORM

The Download Shared Forms component of the FormBuilder enables you to share the forms you've created with other AWARDS-using providers. It also gives you the opportunity to download and use forms those providers have consented to share.

Between the time you initially decide to share a form and the time it is downloaded for use by another provider, several key steps must take place:

- **Step 1: You consent to share a completed form**

  Upon completion of a form, you can choose to share it with other AWARDS-using providers. To consent to the sharing of the form, you must complete the "Sharing a Form" process detailed beginning on page 21.

- **Step 2: Foothold Technology reviews and approves the form**

  The form you have consented to share is then reviewed by Foothold Technology staff. If Foothold determines it is appropriate for use by other AWARDS-using providers, it is approved.

- **Step 3: The approved form is available to all providers using Download Shared Forms**

  The approved form is added to the shared forms list located in the FormBuilder's Download Shared Forms feature. Other providers who are interested in using the form can then download it by completing the "Downloading a Shared Form" process detailed beginning on page 22. Likewise, you can complete this process to download and use any forms they may have consented to share.

  If at any time after this step, you make changes to a form you have shared, those changes are not automatically reflected in the Download Shared Forms feature. Instead, the form must be re-approved by Foothold Technology. (No action is required on your part to initiate this process.) Once re-approved, the updated version of the form replaces the original in the Download Shared Forms index. It does not, however, replace any already downloaded copies of the form residing in other providers' AWARDS databases.

SHARING A FORM

To share a form with other AWARDS-using providers, complete the following steps:

Before beginning, keep in mind that once a form is shared, it cannot be unshared. You should only complete the sharing process for a form that is complete and that you are sure you want to make available to other providers.
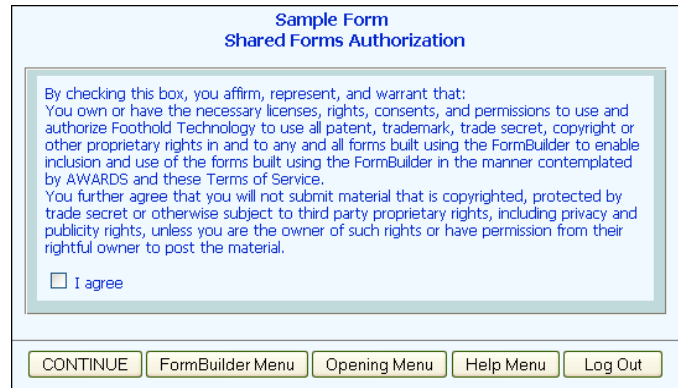
1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **FormBuilder Configuration**. The *FormBuilder – Form Configuration* page is displayed. This page contains an index of all existing forms, as well as an option to add a new form. Forms that have already been shared have a "shared" icon next to them in this list.

4. Click the name of the form to be shared. The *Form Configuration* general form information page is displayed with the "1. General" tab shown by default.

5. On this tab, click the **Can this form be shared with other providers?** drop-down arrow and select "Yes." An informational dialog box is displayed reminding you that you should only make this selection when the form is complete and ready to be shared with other providers.

    This option is only available when the form has not already been authorized for sharing.

6. Click **OK** to close the dialog box and return to the *Form Configuration* page.

7. Click **NEXT**. The *Shared Forms Authorization* page is displayed. ————————————▶

    *If the form you have chosen to share has the same name as another form you previously consented to share, you will receive an error message after clicking NEXT. Click **OK** to acknowledge the error, change the form name to make it unique, and then repeat step 7.*

Sample Form
Shared Forms Authorization
By checking this box, you affirm, represent, and warrant that: You own or have the necessary licenses, rights, consents, and permissions to use and authorize Foothold Technology to use all patent, trademark, trade secret, copyright or other proprietary rights in and to any and all forms built using the FormBuilder to enable inclusion and use of the forms built using the FormBuilder in the manner contemplated by AWARDS and these Terms of Service. You further agree that you will not submit material that is copyrighted, protected by trade secret or otherwise subject to third party proprietary rights, including privacy and publicity rights, unless you are the owner of such rights or have permission from their rightful owner to post the material.
☐ I agree
CONTINUE   FormBuilder Menu   Opening Menu   Help Menu   Log Out

8. Read the agreement text carefully before proceeding. If you consent to share the form based on the terms on this page, click the **I agree** check box. If you do not agree, continue with step 9 without clicking the agreement check box.

9. Click **CONTINUE**. The *Update Field Details per Section* page is displayed.
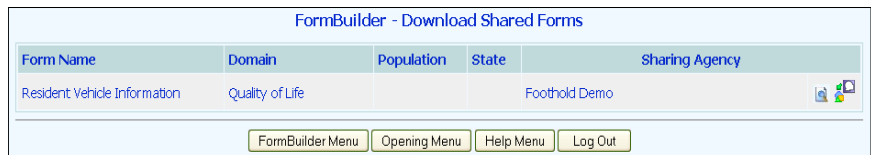
The sharing process is now complete. At this time a "shared" icon 🖼 is placed next to the form on the *FormBuilder – Form Configuration* page, and the form itself is automatically placed in the Foothold Technology queue for review. Once Foothold determines the form is appropriate for use by other providers, it is approved. Approved forms are available in the Download Shared Forms feature.

Please be aware that if you make changes to this shared form in the future, those changes are not automatically reflected in the Download Shared Forms feature. Instead, the form must be re-approved by Foothold Technology. (No action is required on your part to initiate this process.) Once re-approved, the updated version of the form replaces the original in the Download Shared Forms index. It does not, however, replace any already downloaded copies of the form residing in other providers' AWARDS databases.

DOWNLOADING A SHARED FORM

To download a form created and shared by another AWARDS-using provider, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **Download Shared Forms**. The *FormBuilder – Download Shared Forms* page is displayed. ————▶

FormBuilder - Download Shared Forms					
Form Name	**Domain**	**Population**	**State**	**Sharing Agency**	
Resident Vehicle Information	Quality of Life			Foothold Demo	🗎 📰
FormBuilder Menu Opening Menu Help Menu Log Out					

    This page contains a table listing all forms available for download. Click any of the table's column headings to sort the list by that variable. Clicking a heading more than once will reverse the sort order. To also sort by a secondary variable, press **<SHIFT>** and click the second column heading.

4. Preview any of the forms in the shared forms list on this page by clicking the corresponding preview icon. 🔍
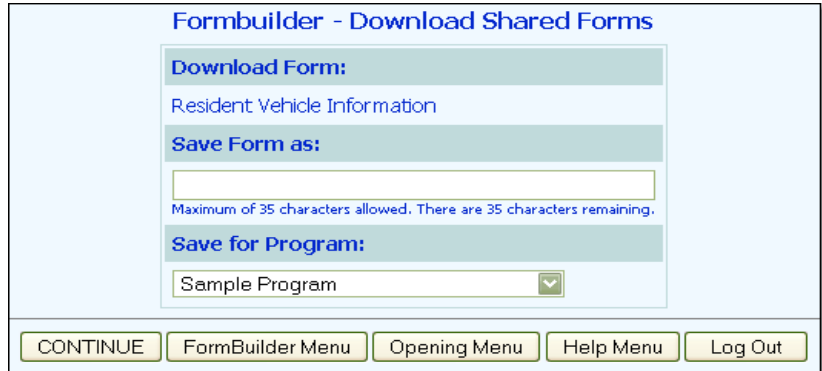
   A new window is opened to show you the complete form. Close that window to return to the *FormBuilder – Download Shared Forms* page.

5. If you would like to download one of the available forms for use in your AWARDS database, click the download icon next to that form. 📇

   The *FormBuilder – Download Shared Forms* page is displayed. ⟶

6. In the **Save Form as:** field, type the name of the form as you would like it to appear in your AWARDS database.

   Form names are limited to 35 characters. As you type the name of the form, the number of characters remaining is displayed beneath the form name.

Formbuilder - Download Shared Forms
Download Form:
Resident Vehicle Information
Save Form as:
[   ]
Maximum of 35 characters allowed. There are 35 characters remaining.
Save for Program:
Sample Program ▾

   [CONTINUE] [FormBuilder Menu] [Opening Menu] [Help Menu] [Log Out]

7. Click the **Save for Program** drop-down arrow and select a program to be associated with the form.

   Keep in mind that you can always use the FormBuilder Configuration tool to associate the form with additional programs after it is downloaded.

8. Click **CONTINUE**. The form is downloaded and the *FormBuilder – Download Shared Forms* is refreshed to reflect the successful download.

9. Click **FormBuilder Menu**. The *FormBuilder Menu* page is displayed.

10. Click **FormBuilder Configuration**. The *FormBuilder – Form Configuration* page is displayed. The downloaded form is included in the index on this page.

11. Click the name of the downloaded form. The *Form Configuration* page is displayed.

12. When a form is downloaded, all configuration settings are downloaded with it. Personalize the form to meet your needs by using the form configuration tabs to make changes to the configuration settings as needed. For example, on the "1. General" tab you can choose to change the location of the form in AWARDS, on the "2. Programs" tab you can choose to make the form available to more programs, and on the "3. Sections" tab you can adjust or add to the form's sections.

13. Click **NEXT**. The *Update Field Details per Section* page is displayed. This page contains a list of all form sections, each of which can be expanded /collapsed to view/hide the contained fields.

14. Using the procedures detailed under "Making Changes to an Existing Form" on page 18, add to or adjust the content and layout of the form as needed.

The process of downloading a shared form is now complete.

DELETING A FORM

To delete a form, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **FormBuilder Configuration**. The *FormBuilder –
   Form Configuration* page is displayed. ───────▶

   This page contains an index of all existing forms, as
   well as an option to add a new form.

   *To see at a glance which programs a form is
   associated with, click the arrow 🔽 to the left of the form name. A Programs pop-up is displayed. Click **Close**
   when you are finished reviewing the programs list.*

4. Click the delete icon ☒ for the form to be deleted. A confirmation dialog box is displayed.

   *A form can only be deleted if it has no data saved in it. If a form cannot be deleted, the delete icon is not
   available for it on the* FormBuilder – Form Configuration *page.*

5. Click **OK**. The form is deleted and the updated *FormBuilder – Form Configuration* page is displayed.

The process of deleting a form is now complete.

*Deleting a form you previously consented to share does not impact its availability in the Download Shared Forms
feature or in the databases of providers who have already downloaded it.*

USING THE FORMBUILDER REPORTBUILDER

The FormBuilder Builder feature enables users to create ad hoc reports from any form built using the FormBuilder
and, when applicable, to see a historical overview of form values.

*During the process of adding fields to a form, you may have chosen to make one or more fields available when
using related ReportBuilders. If so, you can also generate reports of form data using those ReportBuilders. When
doing so, keep in mind that if more than one value exists for a form field during the report date range used, only the
latest value is included in the related ReportBuilder's contents. To see all values entered in the form over a
specified period of time, use the FormBuilder ReportBuilder instead.*

For *client* forms, the FormBuilder ReportBuilder tool can be accessed from within the FormBuilder feature, or directly
from the Outcomes module menu. (The first of these two report access points is limited to use by staff with
FormBuilder access, while the second is designed for use by anyone with Outcomes module access.) For *employee*
forms, this tool can be accessed from within the ReportBuilders component of the Human Resources module, or
from within the FormBuilder feature.

To generate and view a form report, complete the following steps:

1. Open the FormBuilder ReportBuilder from one of the following locations, based on your level of access within
   AWARDS, and the type of form you would like to report on:

   ▪ **Human Resources > ReportBuilders > FormBuilder ReportBuilder** - For employee forms only

   ▪ **Outcomes > FormBuilder ReportBuilder** - For client forms only

   ▪ **Outcomes > FormBuilder > FormBuilder ReportBuilder** - For both client and employee forms

An initial *ReportBuilder Settings* page is displayed.

2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

   This selection is not applicable when accessing the FormBuilder ReportBuilder via the Human Resources module.

3. Click the **Form** drop-down arrow and select the form for which the report is to be viewed.

   The form selection list is limited based on the location from which the ReportBuilder was accessed, and may contain only client forms, only employee forms, or a combination of the two (see step 1 for details). When working with client forms it is also limited by program – the list will contain only forms available for the selected program, or for at least one of the programs if an "All" selection was made.

   The location of each form is listed next to it in parentheses to assist you in identifying the necessary form.

4. By default, the report will include only those forms whose data dates and due dates fall within the last 30 days as indicated with the **Form Date Range** on this page. In this context, the "form date" varies based on the location of the form you have selected.

When the form location is:	The "Form Date Range" looks for forms where:
Face Sheet or Intake	The client was active within the date range
Charting Timetable	The due date or the scheduled event falls within the date range
Discharge	The discharge date falls within the date range
Service Plans and Progress Notes	The date of service falls within the date range
All Other Client-Based Locations	The date the form was created falls within the date range

If necessary, make changes to that default range using the available **From** and **To** fields/date pickers.

Future dates are allowed in the report date range to accommodate things like chart events which may be completed but have dates in the future.

In the event that you are creating a new report that will be saved, or if you will be using an existing report format that was saved previously, please be aware that the form date range is not saved with reports. You must set it each time the report is run.

5. Leave the **Provide ExportBuilder Options** check box *unchecked*. It is NOT relevant to report generation.

   This option is used to provide access to an ExportBuilder corresponding to the ReportBuilder with which you are working. AWARDS ExportBuilders – which are designed for use by individuals who are familiar with export files and formats, their design, and setup – harness the power of ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. With ExportBuilders, users can create customized data reports as they would with the ReportBuilder itself, and from those reports generate export files of a number of different types – CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.

The instructions provided in this document detail use of the FormBuilder ReportBuilder only, not the corresponding ExportBuilder. For more information on using ExportBuilders, please refer to AWARDS Online Help.

6. If you would like the report (both its content and an Excel file version) to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected, you will be able to continue working in AWARDS if you so choose, rather than waiting for the report to generate. You will also be able to retain the report in your messages for reference at a later time without having to re-generate it.

7. Use the **Select a saved report format** drop-down option at the bottom of the page to specify whether you will be generating the report from scratch or using a previously saved format. Available choices are to:

    ▪ **Use a previously saved report format –** To generate the report using a previously created and saved format, select that format from this drop-down. When using this method, you can immediately generate the report without changing any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved report format** check box.

       The report format selection list is limited to those formats saved for the specific form selected in step 3.

    ▪ **Start from scratch, without using a previously saved report format –** To create your own report format for single-time use or for saving and later re-use, leave the saved report format drop-down blank.

8. Click **CONTINUE**.

    If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step **18**.

    *If you chose to send the report to yourself via the Messages module (in step 6), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step **18**.*

    In all other instances, the *FormBuilder ReportBuilder Report Options* page is displayed. Continue with step **9**.

9. The *Options* page contains a list of variables grouped by type, and includes sections for "Demographics," "General," and "Household" (client forms only), as well as sections for each portion of the selected form. Click the check box next to each variable to be included in the report, and/or use the available **Check All** options as needed.

    Form fields are listed on this page in the order in which they are found on the form itself.

10. Click **CONTINUE**. The *Report Options – Continued* page is displayed.

11. Configure or make changes to the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents. Set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

    Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, see AWARDS Online Help.

12. To save the settings made on this and the previous pages so that the report can easily be re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed. ➡️

    *If it is not necessary to save the report format and you only wish to view the report contents, please skip to step **17**.*

13. When saving a new report, in the **Report Format Title** field, type the name of the report.

    We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

    When working with a previously saved format, the title defaults to the name of the selected report format. To save the modified report format as a new format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

    Please keep in mind that only the user who originally saved a format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

14. Click one of the available **Save Report Format for** radio buttons to determine whom the report should be accessible by. Available options are:

    ▪ **Yourself –** When selected, only the user saving the report format has the ability to use or modify that format.

    ▪ **All Staff –** When selected, all staff in the program(s) selected in step 2 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

       In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

15. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

    ▪ **This Program –** When selected, the report format being saved is available for use only by the program chosen in step 2.

    ▪ **All Programs –** When selected, the report format being saved is available for use by all programs, regardless of which program was chosen in step 2.

    The Allow Report Format for options are only available when a single program was selected in step 2; otherwise, the format is saved for all programs by default.

16. Click **Save Report Format**. The report format is saved and the *Report Options – Continued* page is re-displayed.

17. Click **DISPLAY REPORT**. The report is generated and displayed on the *FormBuilder ReportBuilder* page.

    If you chose to send the report to yourself via the Messages module (in step 6), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages

module upon completion. You can then navigate away from the page, or wait for the report to complete and then proceed with step 18.

18. At this time individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel. For more information on working with ReportBuilder report contents, see AWARDS Online Help.

    To view a printable version of the complete form from which a specific row of report data was pulled, click the preview icon to the right of the row in question. 🔍 *The form opens in a secondary window. Be sure to close that window when viewing is complete.*

The process of generating a FormBuilder ReportBuilder report is now complete.

CONDUCTING A FORM SEARCH

The FormBuilder Search feature enables users to search for particular words or phrases within the name, sections, or fields of any form in the local database or shared forms library. To conduct a form search, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click **FormBuilder**. The *FormBuilder Menu* page is displayed.

3. Click **Form Search**. The *FormBuilder Search Settings* page is displayed.

4. In the **Search Phrase** field, type the keyword or phrase for which you are searching.

5. Click the **Location** drop-down arrow and select the location whose forms are to be searched: "This Site," "Shared Forms Site," or "Both Locations." The default value is "This Site."

6. Click the **Domain** drop-down arrow and select the domain type of the forms to be searched. The default value is "All Domains." Other available selections are:

Education/Employment	Housing Retention	Living Skills/Functioning
Medical/Physical Health	Mental Health Status	Misc. Client Information
Quality of Life	Satisfaction/Assessment of Care	Substance Use

The domain is part of the general information of each form and describes the basic assessment area to which the form applies.

7. Click the **Population** drop-down arrow and select the population associated with the forms to be searched. The default value is "All Populations." Other available selections are:

Aging	Children/Youth	Families
HIV/AIDS	Homeless	Mental Heath
Mentally Retarded/DD	Physically Disabled	Substance Abuse
Violence/Trauma Victims	Other/Multiple Service Areas	

The population is part of the general information of each form and describes the type of people for which the form is best suited.

8. Click the **State** drop-down arrow and select the state associated with the forms to be searched. The default value is "All States."

State is part of the general information of each form and describes the state to which the form applies.

9. Click **CONTINUE**. The *FormBuilder Search Results* page is displayed. ———————→

FormBuilder Search Results					
Search Criteria					
Phrase: Sample **Location:** This Site **Domain:** All Domains **Population:** All Populations **State:** All States					
Title	**Type**	**Form Name**	**Domain**	**Population**	**State**
Sample Form	Form	Sample Form ↓	Mental Health Status	Mental Health	NY
Sample Field	Form Field	Sample Form ↓	Mental Health Status	Mental Health	NY
Sample Section	Form Section	Sample Form ↓	Mental Health Status	Mental Health	NY

| FormBuilder Menu | Jump Back | Opening Menu | Help Menu | Log Out |

This page contains a list of search matches in a table with columns for the match title, match type (a form field, form section, or form), the name of the form in which the match was found, and the form location, domain, population, and state. Click on the header for any of these columns to search by the data in that column.

When working with search results where the location is "This Site" there are several convenient features to keep in mind:

- *The data in the title and form name columns for "This Site" matches is clickable. Clicking the link in either column opens the FormBuilder Configuration tool for that form and item. For example, if the item is a "Form Field," the FormBuilder Configuration tool is opened to the* Update a Form Field *page for that field.*

- *The form names for "This Site" matches have a clickable arrow next to them. Click an arrow ⬇ to view the programs for which the corresponding form is available.*

The process of conducting a form search is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the FormBuilder feature can be a useful reference when you have your own questions about the functionality.

CAN A FORM BE LOCKED FROM FURTHER DATA ENTRY AFTER IT'S COMPLETE?

Forms cannot be manually locked from further data entry after they are complete; however, staff can electronically sign forms, which has the same effect. To allow staff to e-sign forms, add a signature field to the form, and use the "Electronic Signature" option for that field. When a staff member has completed a form that has e-signing set up for it, he/she can then sign the form when done entering data in it to prevent further edits by any users.

CAN A FORM HAVE REMINDER MESSAGES GENERATED FOR IT?

If a FormBuilder form's location is the charting timetable, listed as a chart event, chart review reminder messages will be generated for that form automatically. These messages are sent 3 weeks/21 days, 2 weeks/14 days, and 1 week/7 days prior to the form's due date. Once the due date has passed, a reminder is sent every third day until the form's done date is entered in the charting timetable.

CAN A FORM LISTED AS A CHART EVENT BE SCHEDULED AUTOMATICALLY?

No. Form events must be scheduled manually.

CAN A FORM LOCATED ON THE FACE SHEET BE FILLED OUT MORE THAN ONCE?

Each face sheet form can only be completed once per program episode. If the client is in a program, the form is filled out, and the client is discharged and later re-admitted, the original form data is available in the form for the new program episode and can be overwritten with new information; however, the historical information from the original episode is not available for editing purposes. From that point you would only be able to see what was in the form for the initial program stay by using the Demographics ReportBuilder with a date range that overlapped that stay. You could also use that ReportBuilder to see what was currently in the form as long as the date range overlapped the current stay's dates.

CAN A FORM LOCATED WITH PROGRESS NOTES BE FILLED OUT MORE THAN ONCE?

Any FormBuilder forms for which progress notes is the specified location are available for data entry multiple times per day per client, as long as the notes the form is attached to are distinct. For example, if a single staff person writes two notes for a given client on a single day, those notes would need to have different clock times in order to be distinct and allow for the form to be completed more than once for that day.

CAN A FORM SECTION BE DUPLICATED IF THERE ARE TWO SECTIONS THAT WILL HAVE THE EXACT SAME CONTENT?

No. The section would need to be manually created each time – it is not possible to duplicate sections during the FormBuilder configuration process.

CAN A FORM'S DONE DATE BE DROPPED INTO THE CHARTING TIMETABLE AUTOMATICALLY WHEN THE FORM IS COMPLETED?

If a FormBuilder form's location is the charting timetable, listed as a chart event, it is possible to have the done date for that form dropped into the charting timetable automatically. To do so, include in the form a "dynamic text" field with "Charting Done Date" set as the dynamic variable from the client's chart. During the data entry process for the form, if the user enters a done date in that field, it will automatically populate that same field in the charting timetable and the specified done date will appear in both data entry and report modes there.

The "Charting Done Date" dynamic variable can be added to any form; however, values will only be saved in that field in the event that the form's location is the charting timetable.

CAN I ADD MORE THAN EIGHT SECTIONS TO A FORM?

Yes. While initially up to eight sections can be added at once, the maximum number of sections that can be added to a form in total is 15. Begin by entering the first eight sections, and then click **NEXT** to save your work. Circle back around to the Sections data entry tab (FormBuilder Menu > FormBuilder Configuration > Click the form name > Sections), and you will be provided with space to enter up to seven additional sections for a total of 15.

CAN I CHANGE A FORM'S LOCATION TO THE CHARTING TIMETABLE WITHOUT LOSING PREVIOUSLY ENTERED DATA?

Yes. If you move the form to the charting timetable and then schedule the events with due dates that match the client admission dates, any previously entered data will carry over. Keep in mind that the scheduling must be done manually – it does not happen automatically when the form location is changed.

CAN I COMBINE TWO FORMS INTO A SINGLE FORM?

No. At present there is no way to automatically combine multiple forms. The sections/fields from one of the forms must manually be re-created in the other.

CAN I HAVE MORE THAN 24 ITEMS IN A LIST OF CHECK BOXES OR RADIO BUTTONS?

Yes. Initially a maximum of 24 items can be entered, but upon saving the field and re-opening it, you will have the option to add 24 more.

CAN I INSERT PAGE BREAKS INTO A FORM?

There is not a formal page break option for FormBuilder forms; however, the "HTML Br Tag" field type can be used to insert a general break, and in some cases may be utilized as a page break. For example, if the first page of your form is going to be a consistent size (for instance, if it's all selection lists or check boxes and not comprised of fillable text fields that could contain information of varying lengths) you can insert an HTML Br Tag field (or multiple fields of that type) between form sections to act as a page break and move the next section onto the following page.

CAN I RUN A FORM REPORT WITHOUT FORMBUILDER ACCESS?

Yes. The FormBuilder ReportBuilder – located in the Human Resources and Outcomes modules for employee and client forms, respectively – enables users without FormBuilder access to run reports on form data.

CAN I USE A FORM IN MORE THAN ONE LOCATION?

Yes. In order to do so, you will need to select a single location for the form, clone it (being sure to edit the name of the cloned form so that it is distinct from the original), and then select the second location for the clone.

CAN SECTIONS OF A FORM BE HIDDEN FOR PRINTING PURPOSES?

When "Instructions" is selected as the field type, an available "Display in data entry mode only" check box can be used to prevent the entered instructions from being displayed in report mode. This is an exception however, and at this time there is no way to customize printing for other portions of the form by hiding them or otherwise altering the appearance of the form.

CAN TABLES BE ADDED TO A FORM?

No. It is not possible to add a table to a form.

CAN THE APPEARANCE OF FORM TEXT BE CHANGED?

Yes. When adding or updating a field, the field name can be formatted as needed using the formatting options located above the "Field Name" text box.

DOES FORM DATA ENTERED FOR A CLIENT ONE PROGRAM CARRY OVER WHEN THAT CLIENT GOES INTO ANOTHER PROGRAM?

The movement of form data when a client changes programs is based on the types of programs in question, the forms, and the location of the forms. Specifically, form data only copies over when ALL of the following are true:

- **The location is intake or the face sheet –** Form data does not copy over when the forms are located anyplace other than within intake or on the face sheet.

- **The location and form are the same for both programs -** For example, if both programs have the same assessment form located on the face sheet, data will copy over. If that same form is located under intake in one program and the face sheet in the other, data will not copy over.

- **The originating program is a central intake program -** When the client is in a central intake program and a placement is made to another program, any form data entered for the client under intake or in his/her face sheet in the central intake program is copied over to the new program. When the originating program is NOT a central intake program (for example when he/she is discharged from one program directly into another), no form data carries over.

Once form data is copied over to a new program, that data is independent. Changes made to the form data in the new program do not impact the form data in the originating program and vice versa.

HOW CAN I DELETE A COMPLETED FORM?

If a form is located on a module menu page (in Employment, Medical, Discharge, or Services), that form can be filled out more than once per client. To delete a specific instance of the form (if it has not been electronically signed), you must have the "Delete FormBuilder Form" exception override permission assigned using the System Setup module Permissions Maintenance feature. Users with this permission will see a red "x" icon next to saved forms in the form index for each client. Click an "x" to delete the corresponding form. When prompted, click **OK** to confirm the deletion. Electronically signed forms are locked and cannot be deleted, regardless of permission.

The form deletion process is similar if the form is included in a client record in one of the following locations:

Discharge > Process Discharge	Incidents	Medical > Medical Appointment Form
Services > Group Notes	Services > Progress Notes	Services > Service Plans

To delete an included form from one of these locations (if the associated record has not be electronically signed), you must access the relevant client record from data entry mode and click the red "x" icon next to the read-only name of the included form. (The "Delete FormBuilder Form" permission is not required in these instances.) Once an embedded/included form has been removed, you can then include a different form if needed, or re-include the same form if you'd like to start it from scratch.

Form deletions are recorded in the audit trail, located under System Setup > Login Maintenance > Audit Trail.

Completed forms located in other places in AWARDS (for example, within client face sheets) cannot be deleted in their entirety, though individual pieces of data can be manually cleared from the forms of specific clients if needed.

HOW CAN I TELL WHICH EVENTS IN THE CHARTING TIMETABLE HAVE FORMS?

At present there is no built-in way to distinguish between chart event types associated with forms and those for which no form exists. If this is a concern, your agency may want to considering including "Form" in the names of FormBuilder forms – for example, "Daily Activities Form."

HOW DO I MAKE AN EXISTING FORM AVAILABLE TO MORE PROGRAMS?

Follow the instructions provided under "Making changes to an Existing Form" on page 18. During step 5 of that process, click the **Programs** tab and check off the additional programs to which you want to make the form available. If the location for the form is set to "Listed as a Charting Event, available under Outcomes," be sure to contact your Foothold Client Services representative for the Help Desk after completing your changes so that the form can be added as a charting timetable event for the newly selected programs. Be sure your request indicates the program type for each of the programs you just selected for the form.

HOW DO I REMOVE EXISTING DATA FROM A FORM I WANT TO DELETE?

Forms cannot be deleted if there is data associated with them. If you have completed a form for a minimal number of clients, you can remove the data so that the form can be removed without Help Desk intervention. To do so, open the form using the FormBuilder Configuration tool in the FormBuilder. Click the name of the form, and then click NEXT to access the form's fields. Open each required field and change the "Required?" selection to "No," then update. Next open each radio button field and change the field type to checklist, then update. Lastly, open the forms with data in them and delete that data. Once all form data has been deleted, you will see the red "X" next to the form in the FormBuilder Configuration tool and can use that to delete the form.

The above instructions are not applicable if any instance of the form in question has been electronically signed. Electronic signatures lock forms and prevent any of the data they contain from being removed, or from deleting the form in its entirety.

HOW DO I REVIEW DATA FOR AN ASSESSMENT ADMINISTERED SEVERAL TIMES OVER THE COURSE OF A YEAR?

Use the FormBuilder ReportBuilder feature and select a date range for the report that covers the full year. When running the report, you'll see the progression of the administered assessments over the time period specified. You won't be limited to just seeing the latest values for the assessment as you would were you to use other report functionality such as the Demographics Report.

HOW DO I TURN OFF A FORM SO IT'S NO LONGER AVAILABLE FOR DATA ENTRY?

If the form does not have data associated with it, the form can be deleted using the process detailed under "Deleting a Form" on page 23. If there is data saved for the form, go into the **General** tab for that form under FormBuilder Configuration, and set the location option to be "blank." Once you've done that, you will still be able to run reports on the form as needed using the FormBuilder ReportBuilder, but the form itself will no longer be available for data entry, nor will reports of that data be accessible from the form's original location.

WHEN USING COMPUTED FIELD TYPES, CAN MORE THAN ONE COMPUTATION BE MADE IN A SINGLE FIELD?

No, only one computation can be made in a single field. If you would like to perform multiple computations, you must create a separate field for each one.

WHICH "FORM DATES" IS THE FORMBUILDER REPORTBUILDER SETTINGS PAGE LOOKING AT?

By default, the report will include only those forms whose data dates and due dates fall within the last 30 days as indicated with the **Form Date Range** on this page. In this context, the "form date" varies based on the location of the form you have selected.

When the form location is:	The "Form Date Range" looks for forms where:
Face Sheet or Intake	The client was active within the date range
Charting Timetable	The due date or the scheduled event falls within the date range
Discharge	The discharge date falls within the date range
Service Plans and Progress Notes	The date of service falls within the date range
All Other Locations	The date the form was created falls within the date range

WHICH VERSION OF A FORM DISPLAYS ON THE FACE SHEET IF IT HAS BEEN FILLED OUT MULTIPLE TIMES FOR A CLIENT OVER MULTIPLE PROGRAM EPISODES IN THE PROGRAM?

The face sheet displays the form completed during the latest admission, even if you access the face sheet and form via roster archives. For example, if a client had a 2014 program episode and form ABC was completed at that time, was then discharged, re-admitted in 2015, and form ABC was then completed once again, it's the form completed in 2015 that is displayed when accessed from the face sheet via roster archives for the 2014 episode. There is no historical record for multiple versions of forms located on the face sheet when accessed from within the face sheet. If it is necessary to see what was entered in the form during the earlier program episode, you must use the Demographics ReportBuilder with a date range that overlaps that stay. (Using that ReportBuilder you can also see what is currently in the form as long as the date range overlaps the current stay's dates.)

WHY ARE FUTURE DATES ALLOWED IN THE DATE RANGE FOR FORM REPORTS?

Future dates are allowed in order to accommodate things like chart events, which may be scheduled with future dates but be completed now.

WHY ARE THE DYNAMIC SECTION HEADINGS MISSING FROM A PRINTED FORM?

Dynamic section headings are excluded from printable versions of forms by design. Printed forms with dynamic sections will only ever display the data in those sections itself.

WHY AREN'T CODES I ADDED TO A CHECKLIST/RADIO/SELECTION LIST FIELD SHOWING UP IN REPORTS?

If you use the "Code" advanced setting for a checklist, radio, or selection list field type to add codes to an existing field, those codes are only included in reports if the associated values are entered into the form after the code configuration date. In other words, if, on 8/1/2012 I configure a field to have both codes and values, the codes themselves are only going to be included in reports if I enter the corresponding value into the form field after 8/1/2012. Codes will not be determined for any values entered prior to that time. Likewise, if I add a computed value field to a form to count codes, only codes entered after 8/1/2012 are counted.

WHY AREN'T THINGS LIKE FORM NAMES AND FIELD LABELS SAVED CORRECTLY WHEN THEY CONTAIN QUOTATION MARKS (")?

This is a programming limitation. Due to how the code works behind-the-scenes, single (') or double (") quotation marks should never be used in form names or field labels. Apostrophes ('), however, are allowed. For example, *Client's Form* is fine, but *'Client's Form'* is not.

WHY CAN'T I CHANGE THE SECTIONS OR FIELDS FOR A PARTICULAR FORM?

Under FormBuilder Configuration, take a look at the bottom of the General tab. If, under "Is this form a system format?," it states "Yes," it is an indication that this is a system report added to AWARDS by Foothold Technology. As a result, your ability to adjust the form is limited to general settings and program selections. You can also see a preview of the form by clicking **NEXT** while viewing the form's settings, and then clicking on the preview icon.

Please keep in mind that cloned system formats are also limited in regard to a user's ability to make changes to them. Cloning (making a copy of) the form does not remove the system format designation.

WHY DOES A NEW FIELD ADDED TO AN EXISTING FORM ONLY APPEAR ON SOME INSTANCES OF THE COMPLETED FORM BUT NOT ALL?

You may run into this if the form you're working with has been configured to include slots for electronic signatures. If the existing version of the form has been filled out for a client and electronically signed, any new fields added to the form at a later time will not be displayed in the signed version of the form. The new fields will only be displayed on existing instances of the form that were unsigned at the time the fields were added, and on new instances of the form moving forward.

WHY DOES MY FORM DISPLAY CORRECTLY IN ONE BROWSER AND INCORRECTLY IN ANOTHER?

AWARDS supports the two most recent versions of most browsers, such as Internet Explorer, Firefox, and Chrome. If your browser is not up-to-date, some items in AWARDS – including forms - may not display correctly. As a result, whenever possible we recommend that you work with the most recent version of your chosen browser.

WHY DOESN'T THE DATE/TIME STAMP CHANGE WHEN MAKING UPDATES TO A CLIENT'S FORM DATA UNDER THE JOBS/SERVICES/MEDICAL MENU?

When a form already filled out under the Jobs, Services, or Medical menu is opened and updated, the date and time stamp for that form do not change and the data is overwritten, not archived. Please open a new instance of the form if you want it to reflect the current time it was filled out.

WHY DON'T I ALWAYS SEE A FORMS LINK ON CLIENT INTAKE RECORDS WHEN THE FORM LOCATION IS INTAKE/ADMISSION?

When "Intake/Admission – as a link on client intake forms" is selected for the form configuration question "Where will the new form be located?" the FormBuilder Forms link is displayed only after the client's intake or admission has been processed. If the client's referral/intake is unprocessed, the form is not accessible.

WHY IS A FIELD WHOSE VALUE WAS SET TO "OTHER" DISPLAYING AS BLANK ON THE FORM?

When you make the selection "Other" for a form field, the corresponding text field beneath the drop-down selection must also be filled in. If a value is not entered in the other detail field, the "other" selection does not save with the form data.

WHY IS THERE DATA IN A NEW FORM I JUST OPENED?

During the form configuration process forms located on a module menu page, as charting timetable events in the Outcomes module, or on service plan coversheets can be set so that they are pre-populated with data. Which data is pulled into the form is based on the specific form location in question. For more information, see "Building a Form" on page 2.

WHY ISN'T THE CONDITIONALLY REQUIRED FIELD OPTION ALWAYS AVAILABLE?

The Conditionally Required option is only available if there is at least one other field in the form section.

WHY ISN'T THE PROFILE FORM LOCATION ALWAYS AVAILABLE FOR SELECTION?

When "Profile – as a link at the top of client face sheets" is selected for the form configuration question "Where will the new form be located?" the form is not linked to the charting timetable in the Services module. As a result, that location selection cannot be used for recurring forms and is only available if the question "How often will this form be administered?" is set to "Ongoing."