4/18/2022

Custom Form Builder

Custom Form Builder and Publishing Guide

Ron Alai and Dylan Lambrecht
ORION HEALTHCARE TECHNOLOGY

Creating/Building a Form

Before you can publish and use a form, you will need to use the Custom Form Builder Module to create the questionnaire/form first. To open this module you will need to have Super Admin or Admin level access. From the AccuCare Ribbon go to Setup → System → Custom Form Builder

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Setup → Custom Form Builder

Setup > Custom Form Builder

Name	Assigned Categories	Assigned Module(s)	Created By	Last Modified	Published	Archived	Sele
ADULT SUBSTANCE ABUSE DISORDER ASSESSMENT	General Collection of Information Mental Health Asmt Non-DUI Medical Screening	Assessments Client Intake	Ron S Admin	06/19/2020	Yes	No	☑
Client Collection Sheet	General Collection of Information	Client Intake	Ron S Admin	06/19/2020	Yes	No	☐
Data C s V2			Ron S Admin	06/10/2020	No	No	☐
Data Collection Sheet	General Collection of Information	Client Intake	Ron S Admin	09/12/2019	Yes	Yes	☐
Data Collection Sheet V.2	General Collection of Information	Client Intake	Ron S Admin	09/12/2019	Yes	No	☐
Emergency Contact and Medical Information			Ron S Admin	09/10/2019	Yes	No	☐
M H Assessment Test Form	Mental Health Asmt	Client Intake	Ron S Admin	09/26/2019	No	No	☐
Mental Health Asmt V.2			Ron S Admin	03/13/2020	No	No	☐
Mental Health Assessment rev 4.12.17	Mental Health Asmt	Admission/Discharge Assessments Client Intake Scheduler Screening Tools/Supplements	Staff	12/05/2018	Yes	No	☐
NICASA Test Supplemental Question Revised 121019	General Collection of Information	Client Intake	Ron S Admin	04/17/2020	No	No	☐
Non-DUI Medical Screening	Non-DUI Medical Screening	Admission/Discharge Assessments Client Intake Scheduler Screening Tools/Supplements	John B. Trainer	04/17/2020	Yes	No	☐
Test Build			Ron S Admin	06/10/2020	No	No	☐

[Add] [Edit] [Manage Forms] [Add/Edit Categories] [Create Copy] [Delete] [Demo Form] [Preview Report] [Publish] [Archive] [Close]

[**Add**] button – allows you to create a new unpublished custom form.

[**Edit**] button – allows you to edit existing custom forms that have not been published.

[**Delete**] button – allows you to delete unpublished forms.

[**Create Copy**] button – allows you to create a copy of either a published or an unpublished custom form

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Emergency Contact and Medical Information			Ron S Admin	09/10/2019	Yes	No	☐
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Non-DUI Medical Screening	Non-DUI Medical Screening	Admission/Discharge Assessments Client Intake Scheduler Screening Tools/Supplements	John B. Trainer	04/17/2020	Yes	No	☐
Test Build			Ron S Admin	06/10/2020	No	No	☐

Add | Edit | Manage Forms | Add/Edit Categories | Create Copy | Delete | Demo Form | Preview Report | Publish | Archive | Close

[**Demo Form**] button – is a "sandbox" that allow you to test how the form will look and behave during use after publishing.

[**Close**] button – Close the module and returns you to the Main Menu.

[**Preview Report**] button – gives a quick preview of the layout of the form.

[**Archive**] button – allows you to archive published forms. Archiving a published form will hide the form from view in the Custom Forms

[**Publish**] button – will convert the created form to a usable and fillable form, which can administered from the Custom Forms module.

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Setup →Custom Form Builder – Add Button
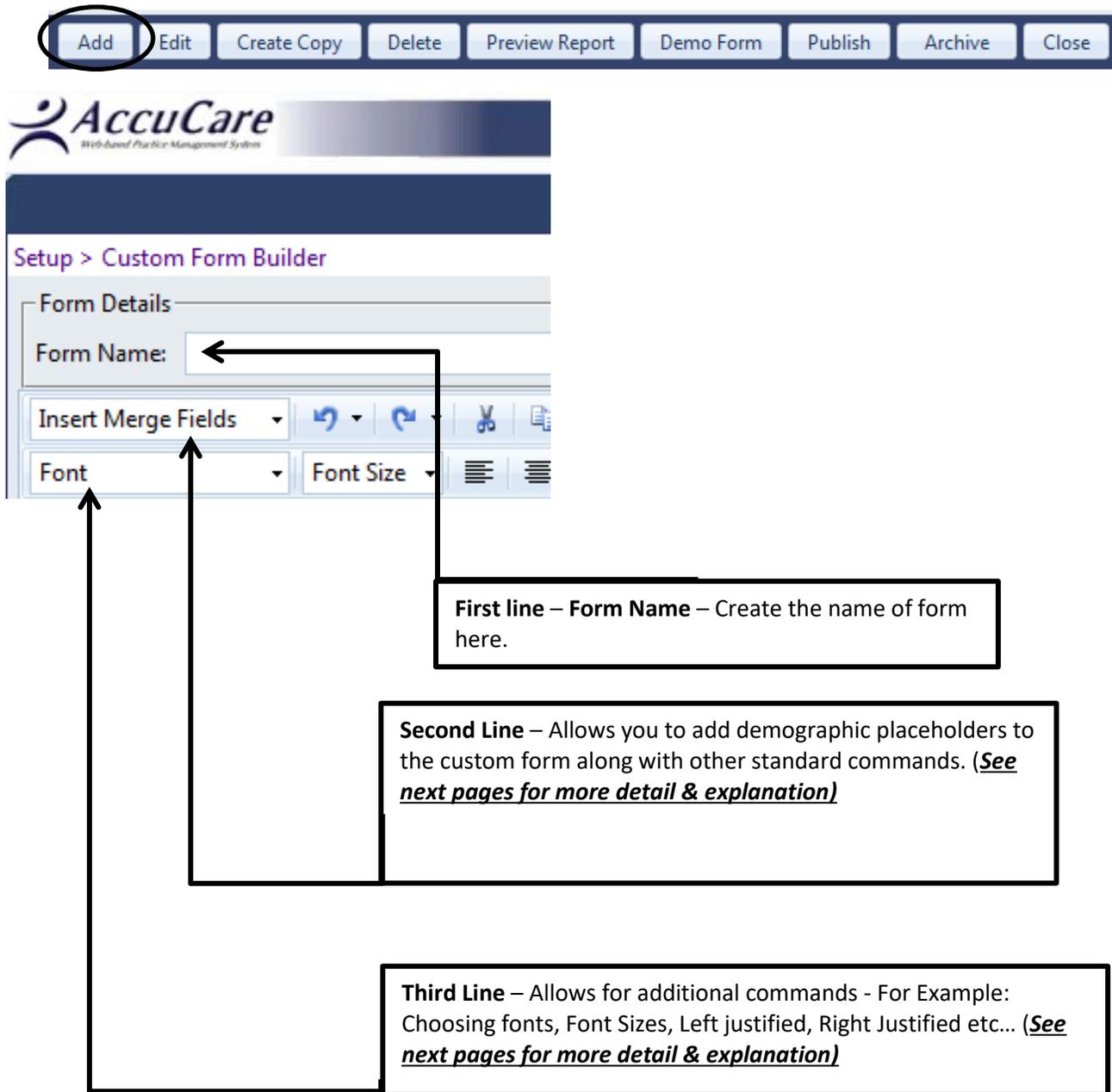
First line – **Form Name** – Create the name of form here.

Second Line – Allows you to add demographic placeholders to the custom form along with other standard commands. (*__See next pages for more detail & explanation__*)

Third Line – Allows for additional commands - For Example: Choosing fonts, Font Sizes, Left justified, Right Justified etc… (*__See next pages for more detail & explanation__*)

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Second Line – [**Insert Merge Fields**] - Detailed Explanation

| Insert Merge Fields ▾ | ↶ ▾ | ↷ ▾ | ✂ | 🗐 | 📋 | **B** | *I* | U | 🖉 ▾ |

Date
Client First Name
Client Last Name
Client Date Of Birth
Client Address
Client City
Client State
Client Zip
Client Phone Number 1
Client Billing Reference Number
Social Security #
Gender
Client Reference #
Nick Name
Email Address
Tribe of Membership
Comments
Referring Provider First Name
Referring Provider Middle Initial
Referring Provider Last Name
Referring Provider Suffix
Client Billing Info Comment
Marital Status
Employment Status
Religion
Race
Ethnic Group
Military Status

ⓘ Admission Date
ⓘ Date
ⓘ Location Of Service
ⓘ Referral Reason
ⓘ Referral Source
ⓘ Service Requested
ⓘ User

Each of these choices can be added to your custom form builder.

What this means: These placeholders, allow you pull data from other locations with AccuCare. **(See Fig. 2A and 2B)**

Each of the choices above would give you a generic demographic placeholder. For Example, the Client First Name would look like this **##FirstName##** on your creation.

What this means: There is a placeholder, which allows you to pull demographic information from the Client Intake Module. **(See Fig. 1A and 1B)**

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Here are some examples of what you will be able to add to the form when you require demographic information to appear on your form.

Fig. 1A

Emergency Contact and Medical Information for a Child

Date Form Created   ##Date##

Childs Information: ☐ Male   ☐ Female

First Name: ##FirstName##   **Last Name:** ##LastName##   **DOB:** ##DateOfBirth##

Address: ##AddressLineOne##

City: ##City##   State: ##State##   Zip Code: ##ZipCode##

Phone: ##PhoneOne##

Here is what it will look like after you publish and use the form for a client. When you use the published form the placeholders are replaced with client first and last name, date of birth, address and phone number pulled from client intake.

Fig. 1B

Emergency Contact and Medical Information for a Child

Date Form Created   05/15/2015

Childs Information: ☐ Male   ☐ Female

First Name: Joey   **Last Name:** Smith   **DOB:** 06/04/2000

Address: 42 West Street

City: Omaha   State: NE   Zip Code: 68130

Phone: (402) 345-3333

Here is of the custom Data Fields: ((NEED TO ADD to this document))
Assessment Date
Date
Location of service
Referral Reasons
Referral Source
Service Requested
User

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Fig. 2A

Fig. 3A

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Third Line – **[Font & Font Size]** will give a list of five different fonts along with the ability to change the font size.
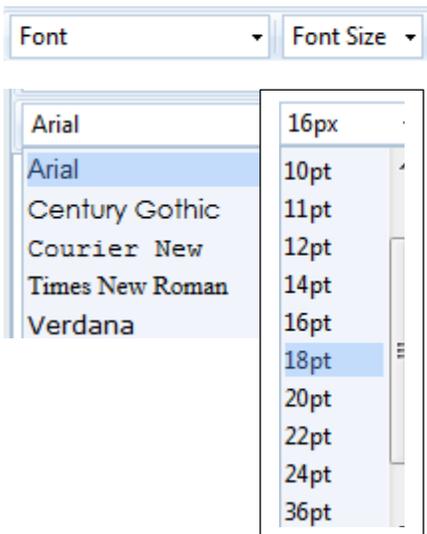
Suggestion: Create the form first using the same font and font size throughout. Prior to publishing, go through the form and change the font and size on those areas you wish to change. To change Font or Font size simply highlight the area you wish to change then go up to Font or Font Size to select.

Next to the **Insert Merge Fields** you will see the standard Toolbar you would find in most word processing programs.

Undo

Redo

Cut

Copy

Paste

Bold

Italic

Underline

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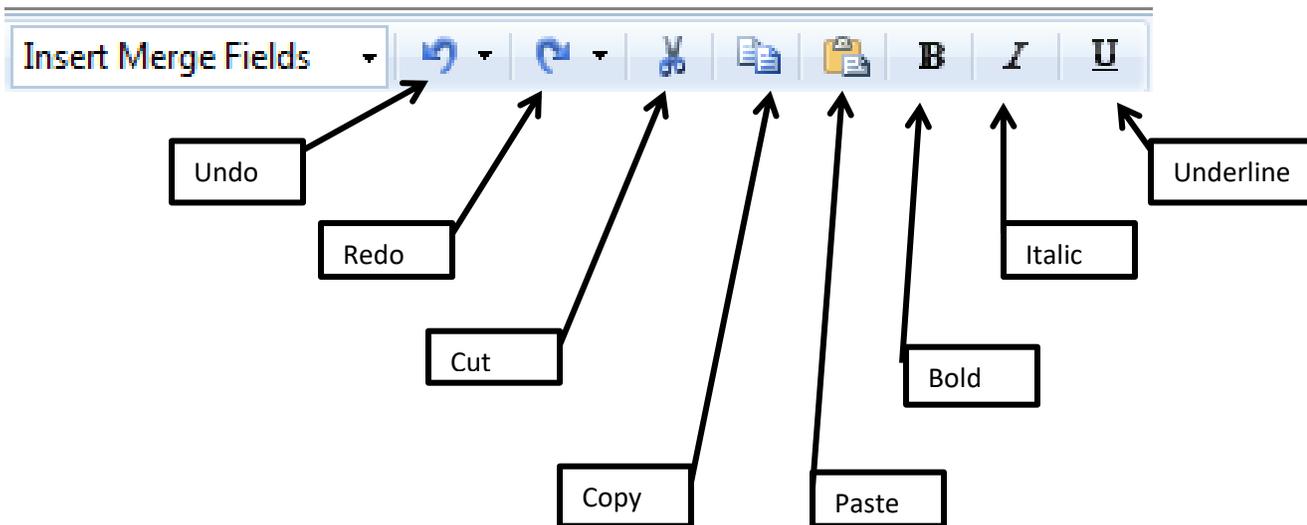
This Toolbar will come in handy when you need to Cut, Copy, and Paste as well change the font to bold or Italic with an underline.

Here are some shortcut key commands you can use as well:

1) Crtl + X = Cut

2) Crtl + C = Copy

3) Crtl + V = Paste

On the third line after the font and font size, you will find another Toolbar to help you create your form. You do not need all of these items to create your form but we have included them to assist you with creating a new form.

Overview of Third Line in Toolbar

Area #1 – Covers

1) Aligning Text to the Left

2) Centering Text

3) Aligning Text to the Right

4) Aligning Text

5) Removing Alignment

Area #2 – Covers

1) New Paragraph

2) Indent Paragraphs

3) Out dent Paragraphs

4) Draws Horizontal Rule

5) Bullet List

6) Number list

7) Insert Symbols

8) Changes Font Color

Area #3 – Covers

1) Line Spacing

2) Table Wizard

3) Insert of Form Elements

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Area #1 – *Alignment of Text*

Alignment to the left
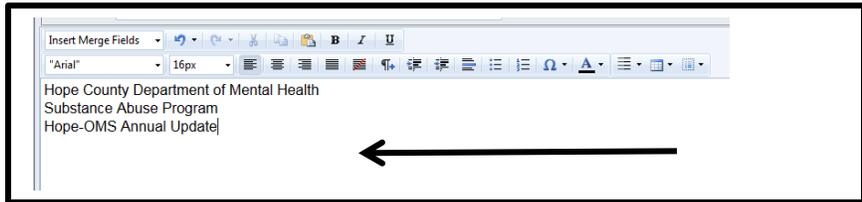
Alignment to the center
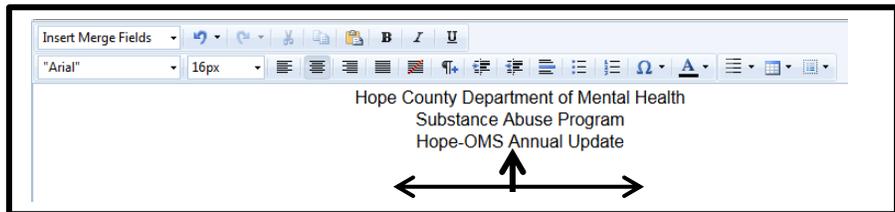
Alignment to the right
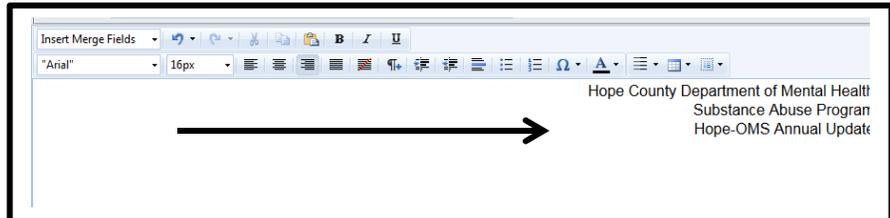
Alignment back to justified
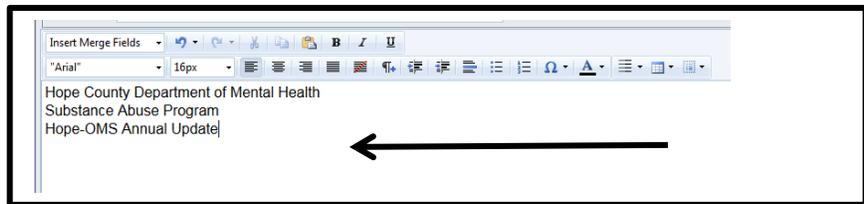
Removes any of the Alignments shown above

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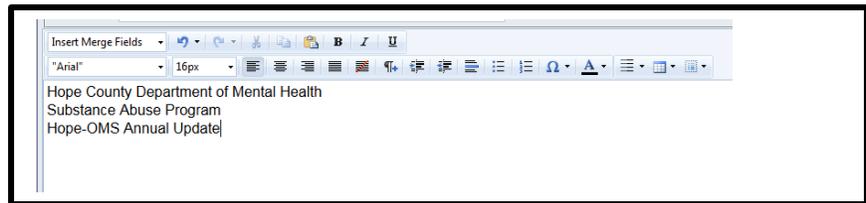
Area #2 – _Paragraphs and Lists_

Creates a new paragraph by placing a space between paragraphs.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.

To change the overall look of your document, choose new Theme elements on the Page Layout tab. To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template.

Indents the paragraph by moving the entire paragraph in.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

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Out dents the paragraph to the opposite direction. This moves the entire paragraph back to previous position.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

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Horizontal Rule – draws a line to help separate sections.

To change the overall look of your document, choose new Theme elements on the Page Layout tab. To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template.

Hope- OMS Annual Update Tab   Episode #

First Name: ##FirstName##   Last Name: ##LastName##

DOB: ##DateOfBirth##

SSN: or No SSN Code:

Bullet option allows you to create bullet statement within the form.

Alcohol and Drug Use Data Tab

Drug Problem: Enter 1 _**AND**_ 2 to Select for Primary Drug (1) and

- Type in Bullet 1
- Type in Bullet 2
- Type in Bullet 3
-

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Number List allows you to create a numbered list.

Alcohol and Drug Use Data Tab

Drug Problem: Enter 1 **_AND_** 2 to Select for Primary Drug (1) and

1. Type in Number List
2. Type in Number List
3. Type in Number List

Insert Symbol – you have the ability to add symbols to your typed statements or instructions.

Drug Problem: Enter 1 **_AND_** 2

€ ¾ Ø ©
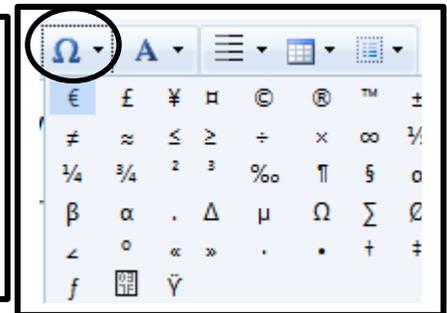
Foreground Color allows you to change colors on your form to help emphasize key points.

Add Custom Color...

#000000   #000000
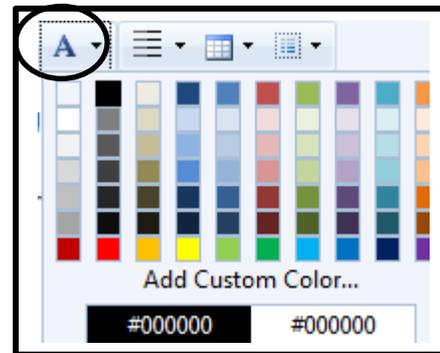
Alcohol and Drug Use Data Tab

Drug Problem: Enter 1 **_AND_** 2 to Select for **Primary Drug** (1) and **Secondary Drug** (2) of Choice (Code)

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Area #3 – _Insert Line Spacing, Tables and Form Elements_

Line spacing allows you to highlight an area then set the spacing.
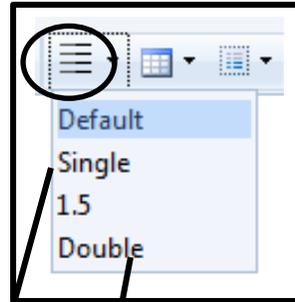
On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, o diagrams, they also coordinate with your current document look.

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galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, o

diagrams, they also coordinate with your current document look.

Inserting Tables allows you to create a table in your form.

When you open the Table icon select the number of rows and columns to create your grid.

In this example, I chose a 3 X 8 blocked grid.

Table Wizard

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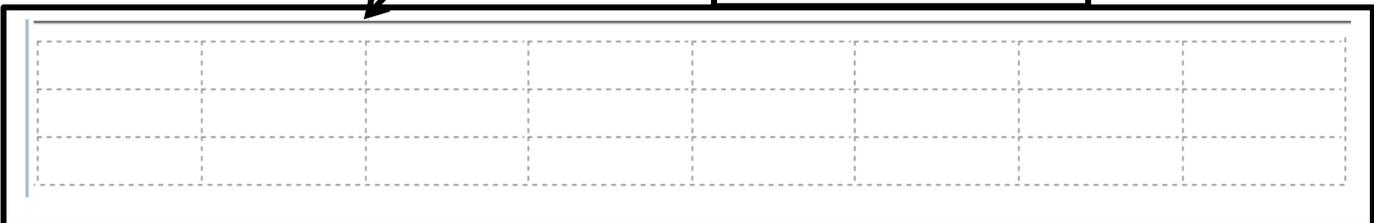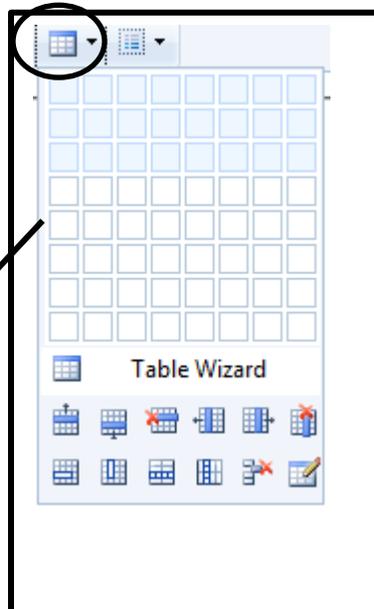
Insert Form Elements icon allows you to add check boxes, radio buttons, selection boxes, text boxes and text areas to your form.

Instructions:

When you select **Insert Checkbox** your given the checkbox properties dialog box.

a. Click the radio button for **New Group** to create a group name for a

list of disabilities. This will be our first one.

b. Decide what text you want to be displayed next the checkbox.

c. Give each checkbox a DB value (for example, I am using DCB1 since I plan to create a couple of check boxes for this group)
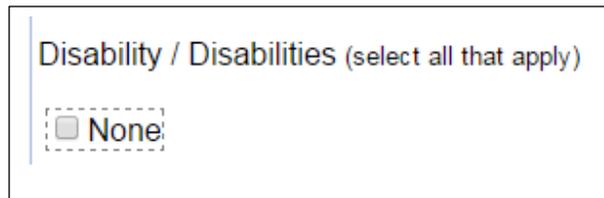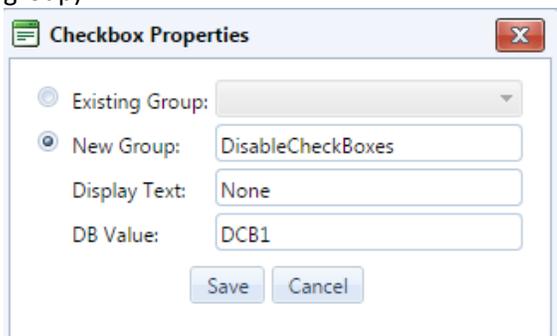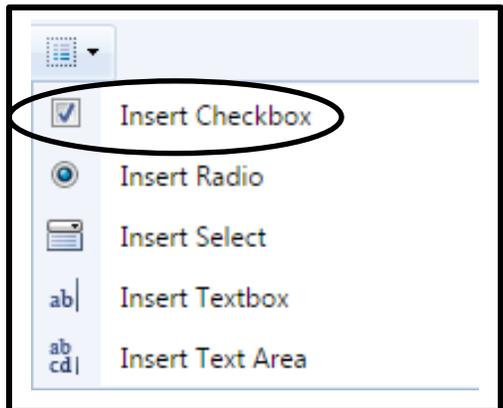
d. For the next entry I selected **Existing Group** to add the next item to my list and I want to keep everything within the same group.

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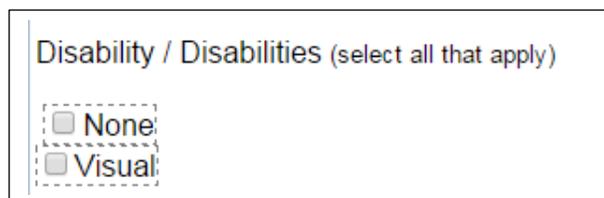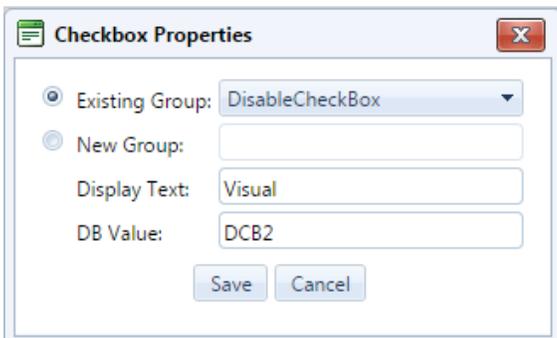
e. Let's do one more so you can see the pattern.
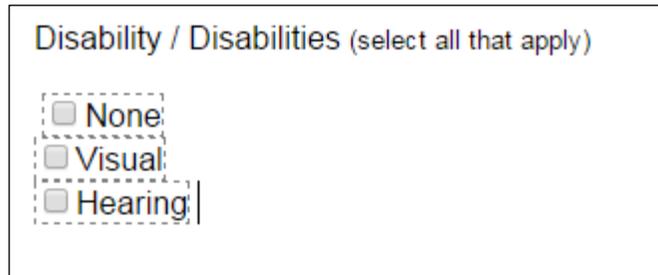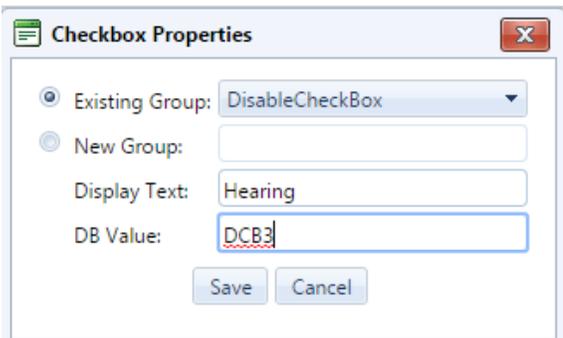
When I have completed creating my checkbox list it should look something like this:
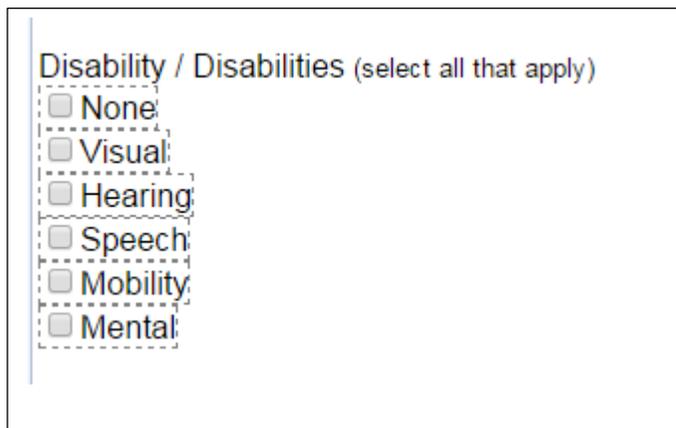
After publishing your form you will able to use the checkboxes:

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Insert Form Elements allows you to add check boxes, radio buttons, selection boxes, text boxes and text areas to your form.

Instructions:

When you select **Insert Radio** your given the Radio Properties dialog box.

a. Click the radio box for **New Group** since we are creating a decision type of response.

b. Decide what type of decision you would like to ask that requires an either / or type of decision.
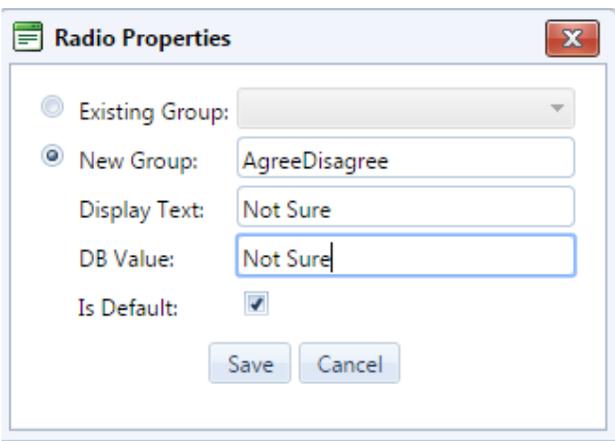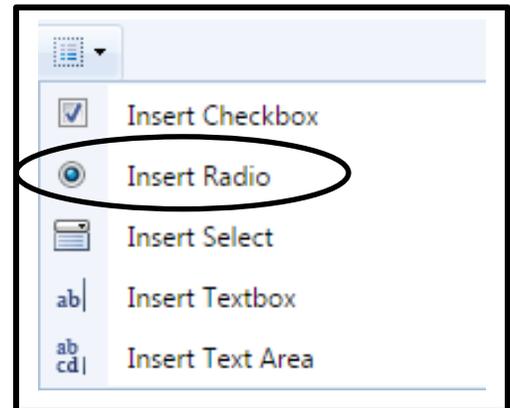
For example I need to know if the person being asked the following question agrees, disagrees or not sure

In your opinion - Do you agree or disagree with this statement:

Client's should be given the choice of inpatient treatment when admitted for treatment by their doctor?

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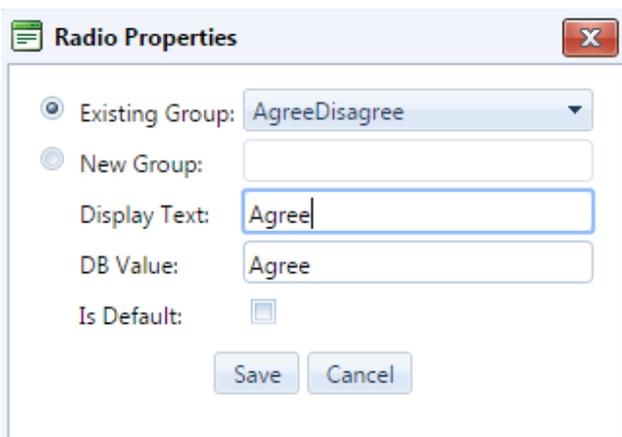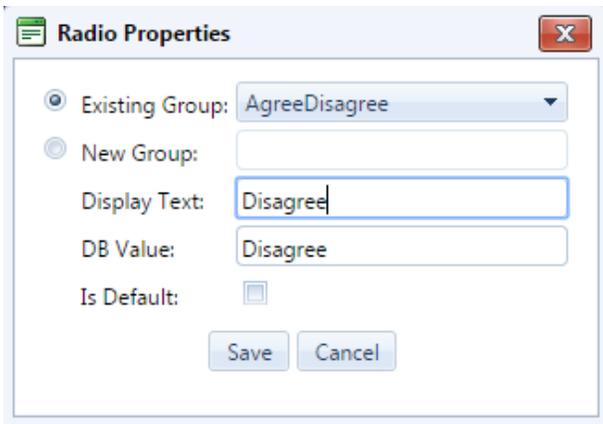
Once you have created the text and DB Value for each radio button, it should look similar to the example below.

Insert Form Elements allows you to add check boxes, radio buttons, selection boxes, text boxes and text areas to your form.

Instructions:

When you select **Insert Select** your given the Insert Select dialog box. This dialog box allows you create a picklist of choices.

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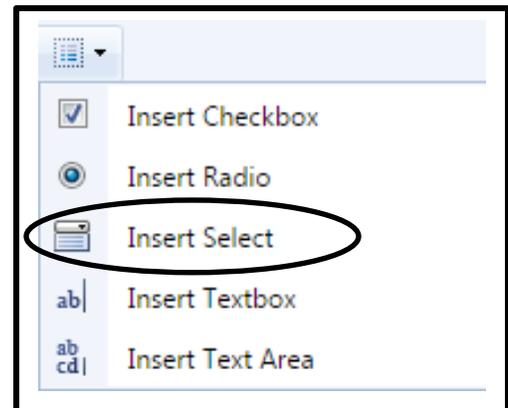
Under Add/Remove Options:

Use the + sign to create your pick list

Under Properties:

Create Field Name, Type in a Width, Height and Size. Decide if you will allow multiple or one choice.

Insert Select

Add/Remove Options

➕ ➖

Options:

Display Text: DB Value:

Properties

Field Name:

Width: pixels

Height: pixels

Size:

Multiple: ☐

OK   Cancel

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Follow this three steps process when creating your pick list using the Insert Select.

Step #1

 Click the ✚ under **Add/Remove Options** – Click the ✚ the number of times to match the list of item for this pick list. As you can see I have click it 5 times to get Option1 thru Option5

Insert Select

Add/Remove Options

✚ ➖

Options:

Option1

Option2

Option3

Option4

Option5

Display Text: DB Value:

Properties

Field Name: PhysicalExam
Width: 100 pixels
Height: 100 pixels
Size: 100
Multiple: ✔

OK   Cancel

Step #2

 Under **Properties,** create a Field Name for this pick list. Choose Width, Height and Size then decide if you are going to allow for multiple choices.

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Step #3

 Now go back to Add / Remove Options and change each option you created with the Text you would like to see on the pick list. You can also change the DB Value to give it more meaning.
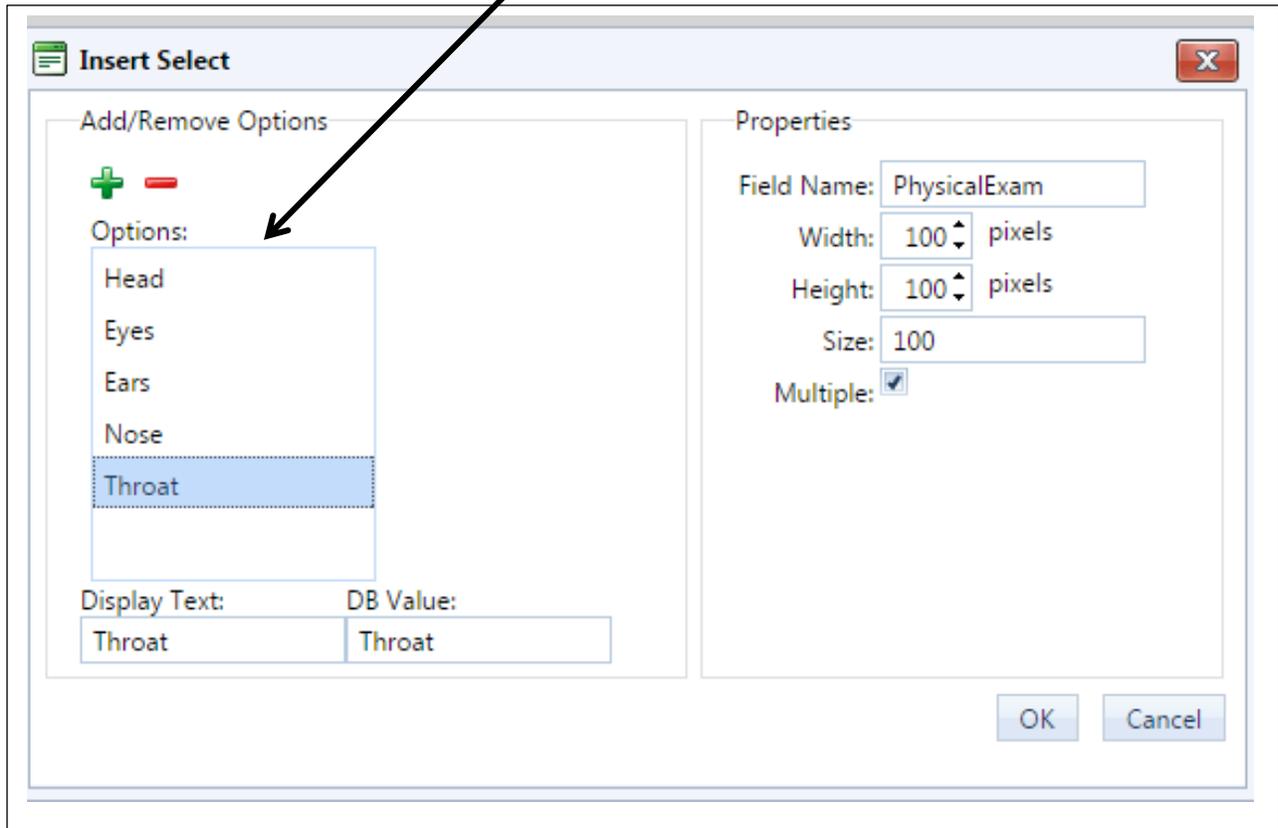
Here is what it looks like right after I created the pick list.

Note: Above the pick list I typed in 'Physical Exam- What areas need to be checked'
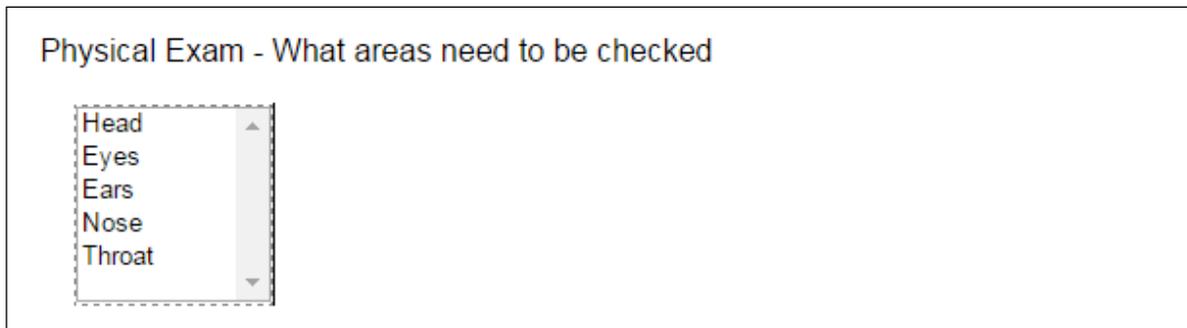
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Insert Form Elements allows you to add check boxes, radio buttons, selection boxes, text boxes and text areas to your form.

Instructions:

When you select **Insert Textboxt** your given the Insert Textbox Properties dialog box.

In this example:
1) I created a DB Name of **Question1**.
2) Then I pasted the following statement for Default
Value - **Number of days in the past 30 days that the client has used alcohol?**
3) I tried using the default number of pixels of 200 but found it would cut off some of my text so tried 400 pixels. You will need play around with this to ensure everything fits.

 (**Note:** there is a limit of 900 to 1000 pixels. It will run off the screen so you are liimited to around 900 to 1000 pixels. I would suggest using the Insert Text Area option if you need more space for a response.)
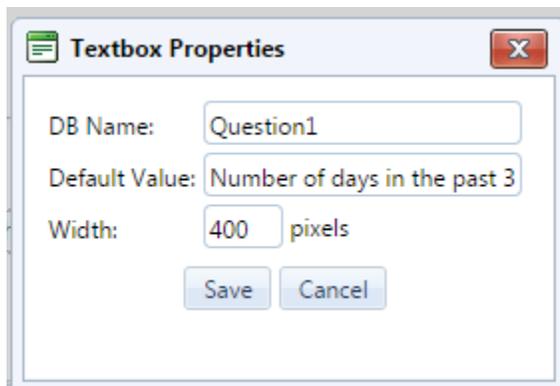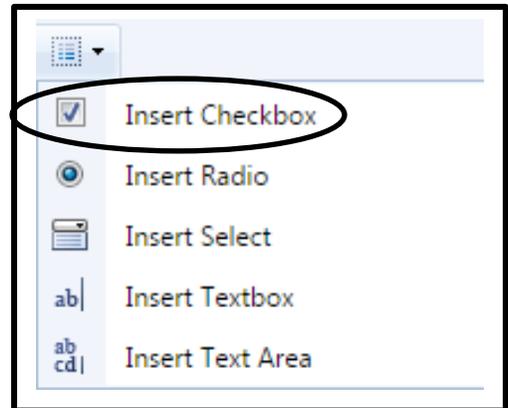
What is looks like after creating the text box:

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Instructions:

When you select **Insert Text Area** your given the Insert Text Area properties dialog box.

In this example:
1) I created a DB Name of **Statement1**.
2) Then I pasted a saved statement with a couple of lines from a text file.
3) I tried using the default number of pixels of 200 for both width and height but found it to cut off some of my text so I tried 300 pixels width and 250 pixels height. You will need play around with this to ensure everything fits.

Here is screen shot of the pasted text in a Text Area box

*** This is just a example statement to show you how the Insert Text Area option works ***   You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly. *** This is just a example statement to show you how the Insert Text Area option works ***

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Using Published Forms

Once a form has been created and published forms can be open by clicking this Icon

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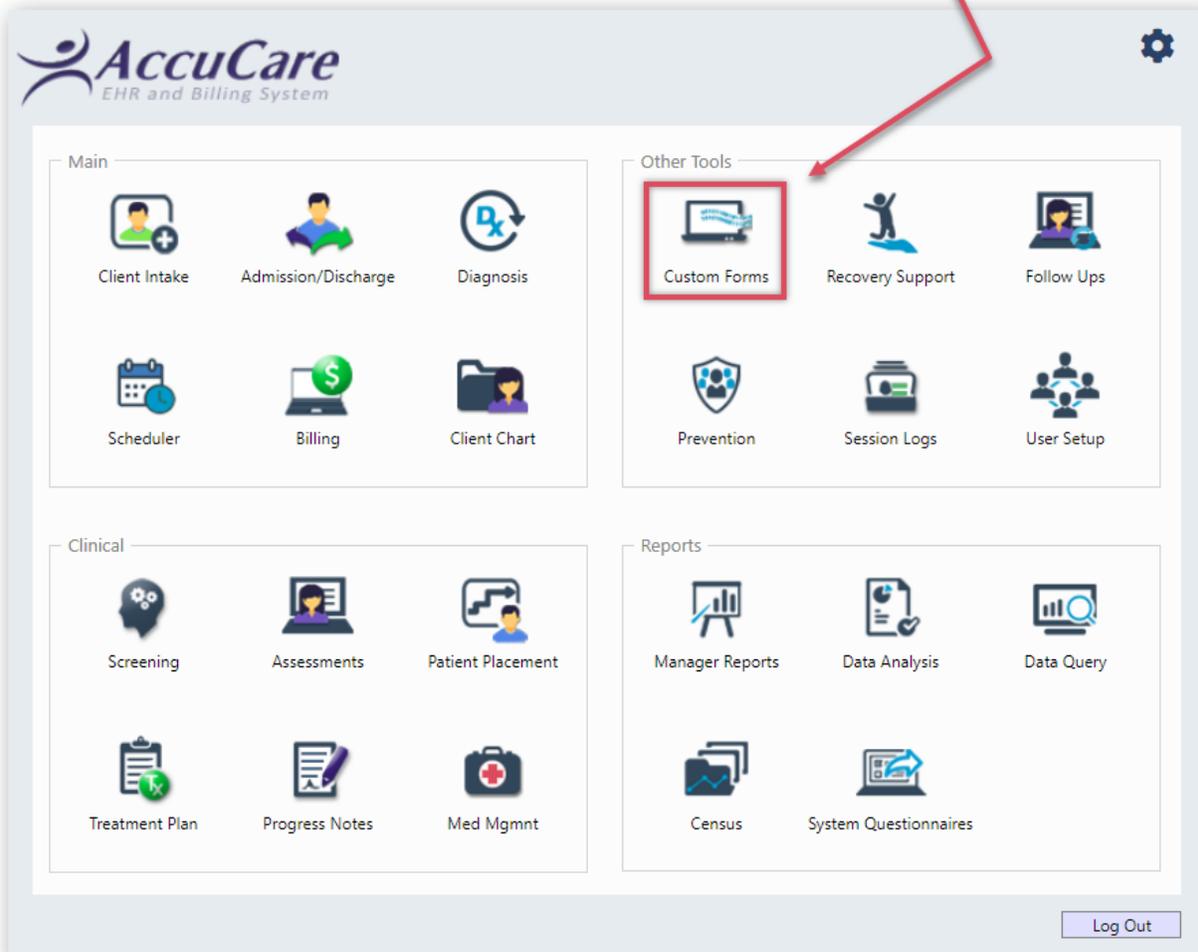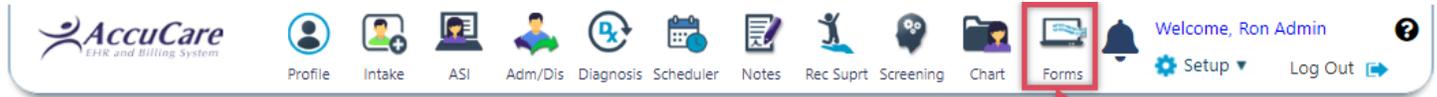
To pull up a published custom form you must first select a client.

File > Custom Forms

Search by: Last Name

Begins with or matches:

Search   Display All

Name	SSN	Client Reference #
Smith, Jennifer		
Smith, Joey		
Smith, John J.		

Date	Form Name	Select
No records to display.		

Add   Edit   Delete   Preview   Print   File and Sign   Export to Excel   Close

Next – Click on the [Add] button

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The Custom Forms dialog box will gray out and a new dialog box will come to the front called Create New Form.
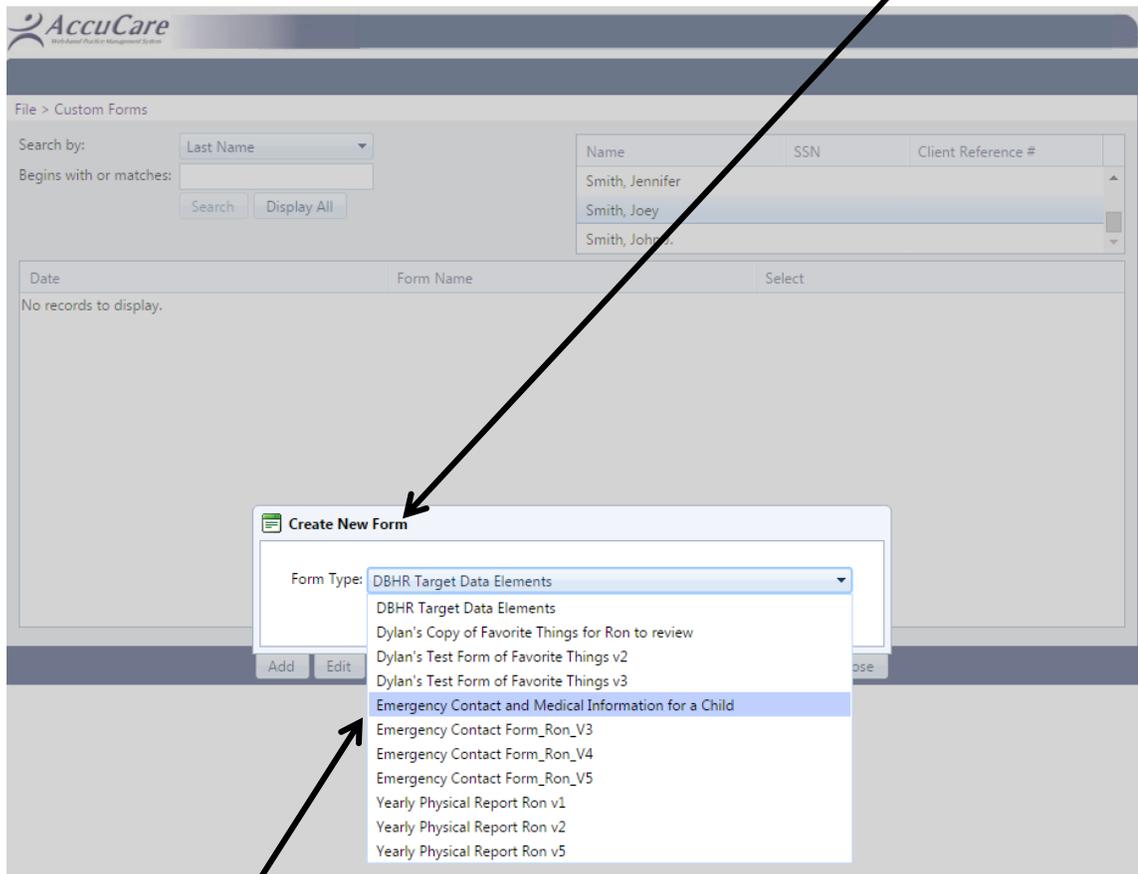
I have selected: **Emergency Contact and Medical Information for a Child**
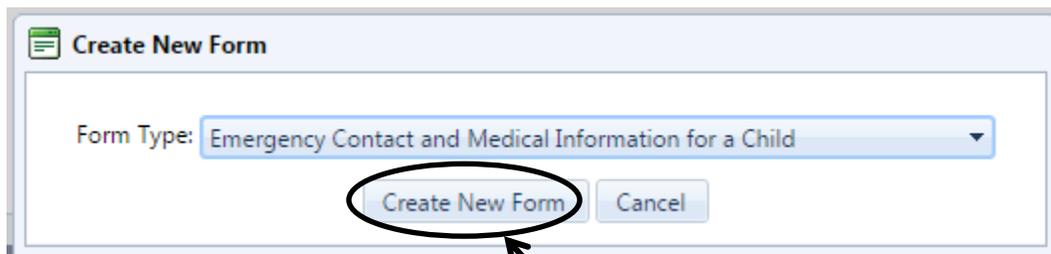
Click the [Create New Form] button to open the form.

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Here is a screen shot of the form prior to filling in the information:

File > Custom Forms

Form Date: 05/29/2015

Emergency Contact and Medical Information for a Child

Date Form Created   05/29/2015

Childs Information: ☐ Male   ☐ Female

Child's First Name: Joey   **Last Name:** Smith   **DOB:** 06/04/2000

Address: 42 West Street
City: Omaha   State: NE   Zip Code: 68130

(402) 345-3333

Alternative Emergency Contacts:

Primary Emergency Contact [   ]   **Secondary Emergency Contact** [   ]

Home Phone [   ]   Home Phone [   ]

Work Phone [   ]   Work Phone [   ]

Address [   ]   Address [   ]

Medical Information:

Hospital/Clinic Preference [   ]

Physicians Name: [   ]   Phone Number [   ]

Insurance Company [   ]   Policy Number [   ]

Allergies/Special Health Considerations: [   ]

☐ I authorize all medical and surgical treatment, X-ray, laboratory, anesthesia, and other medical and/or hospital procedures as may be performed or prescribed by the attending physician and/or paramedics for my child and waive my right to informed consent of treatment. This waiver applies only in the event that neither parent/guardian can be reached in the case of an emergency.

☐ I give permission for my child to go on field trips. I release [   ] and individuals from liability in case of accident during activities related to [   ] as long as normal safety procedures have been taken.

Parents / Guardian's Type in Name [   ]   Date: [   ]

_____
Parents / Guardian's Signature

Save   Cancel

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Here is a screen shot of the form after filling in the information:

Once the form has been filled out click on the [Save] button. You can always come back to this form to edit.

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Whenever you look up a client in Custom Forms, you will be able to see all the forms created for that client.

[**Add**] button – Brings up a list of published forms.

[**Close**] button – closes the Custom Forms Module.

[**Edit**] button – Allows the user to go back to the fillable form to make changes.

[**Export to Excel**] button – will allow you to pull all the inputted data from a selected form.

[**Delete**] button – The selected form can be deleted but the user must have the proper security level to perform this task.

[**File and Sign**] button – will send a copy of the form to Chart Management and allows you and the client to sign the document electronically.

[**Preview**] button – Gives the user a preview of how the form will look if printed

[**Print**] button – Allows you to print out the form.

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Tips & Considerations

Tips & Considerations for the Custom Form Builder

- When inserting a form element please keep in mind that inserting checkboxes is best utilized when you have an answer that can have multiple selections. If your answer to the question should only have one selection made then it is best to insert radio buttons.
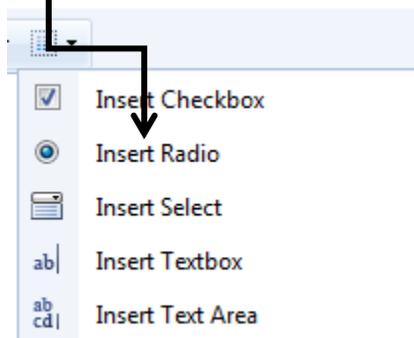
- When creating multiple selections (radio and/or checkboxes) that are given for a specific question it is best to create a grouping for each set of either radio or checkboxes and to tie each radio or checkbox to that same group when creating the button.

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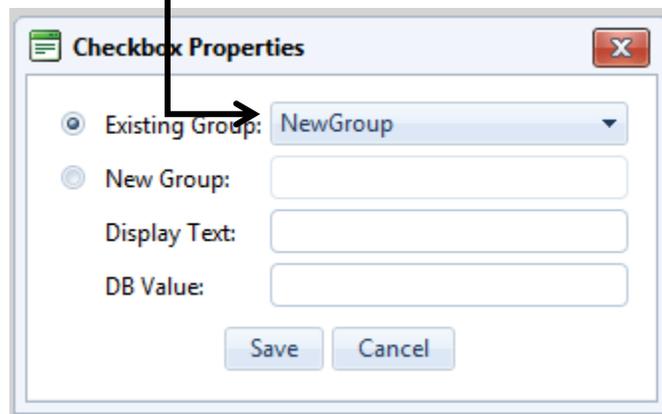
- It is important to create a proper DB value when creating form elements as this will tie into the 'Export to Excel' feature once the form is published and has been completed for a given client. Be as specific as possible when naming your DB values as it pertains to the given question or answers available for selection. Being specific with each form element created will in turn make your output to excel easy to read and understand after a form has been added for a given client.
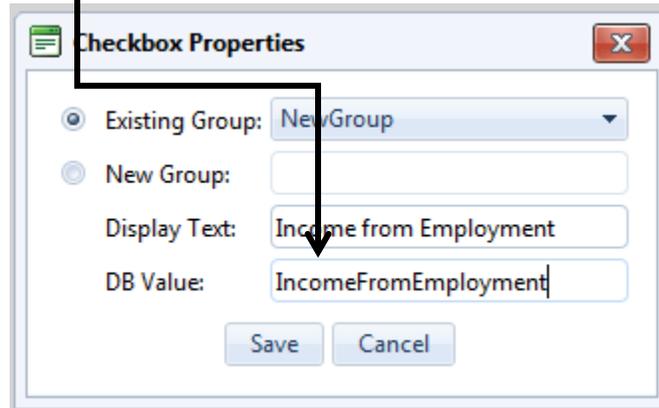
- Please keep in mind that you cannot completely copy and paste a completed form from a PDF or Word document into the Custom Form Builder. The form must be recreated utilizing the tools provided in the Custom Form Builder. Form elements created in other applications WILL NOT carry over into the Custom Form Builder.

- Please keep in mind that once you publish a form within the Custom Forms Builder that you CANNOT delete or edit that form.

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- Archiving a published form will remove the form for available selection when selecting the 'Add' button under the 'Custom Forms' module for any given client.

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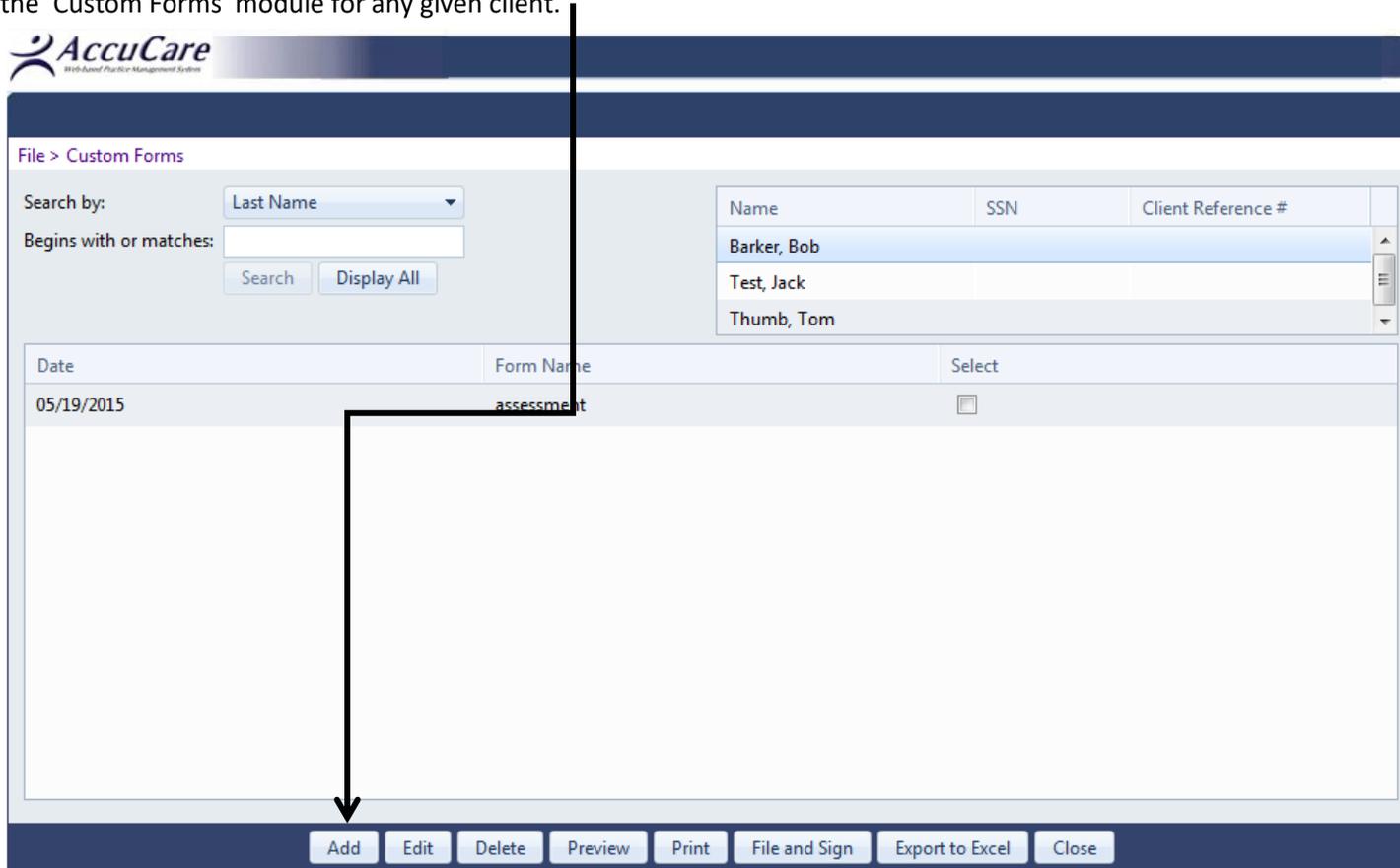
- If you must make edits to a published form within the Custom Forms Builder it is best to first select the published form and then select 'Create Copy'. Then you would provide the new form with a new name and make your necessary edits to the form and once completed/reviewed you could publish that form. You would then want to archive the old, published form.

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- It is best practice to first select 'Demo Form' and 'Preview Report' within the Custom Form Builder prior to publishing the form. This will ensure all questions/answers are aligned properly prior to publishing the form.

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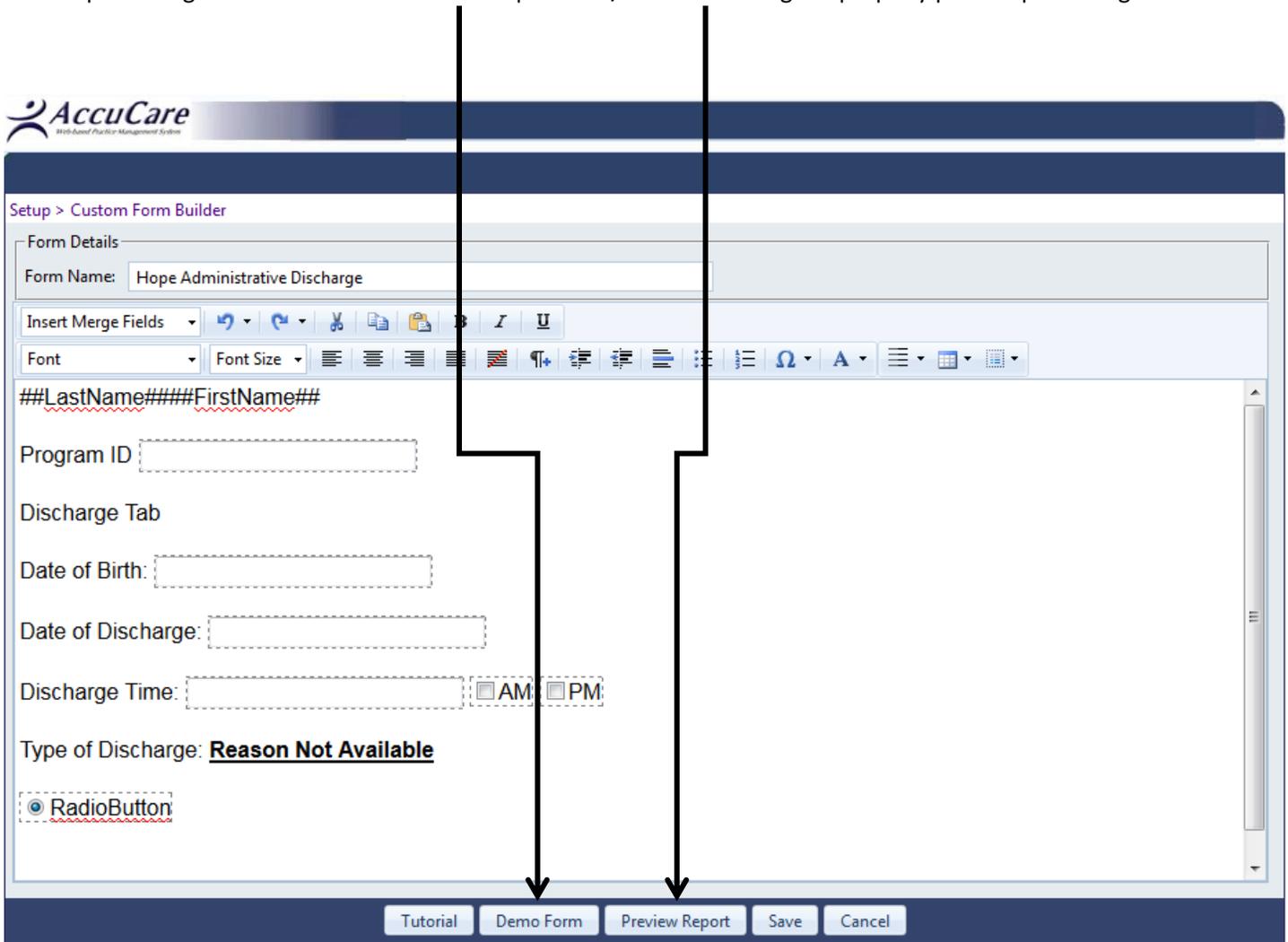
- When inserting a select box from within the form element menu it is important that when adding options for the select box to make sure the display text and DB value are the same or similar in verbiage. This way when the form is published the available selection when selected will match up with the database value that is displayed on the export to excel for that form.
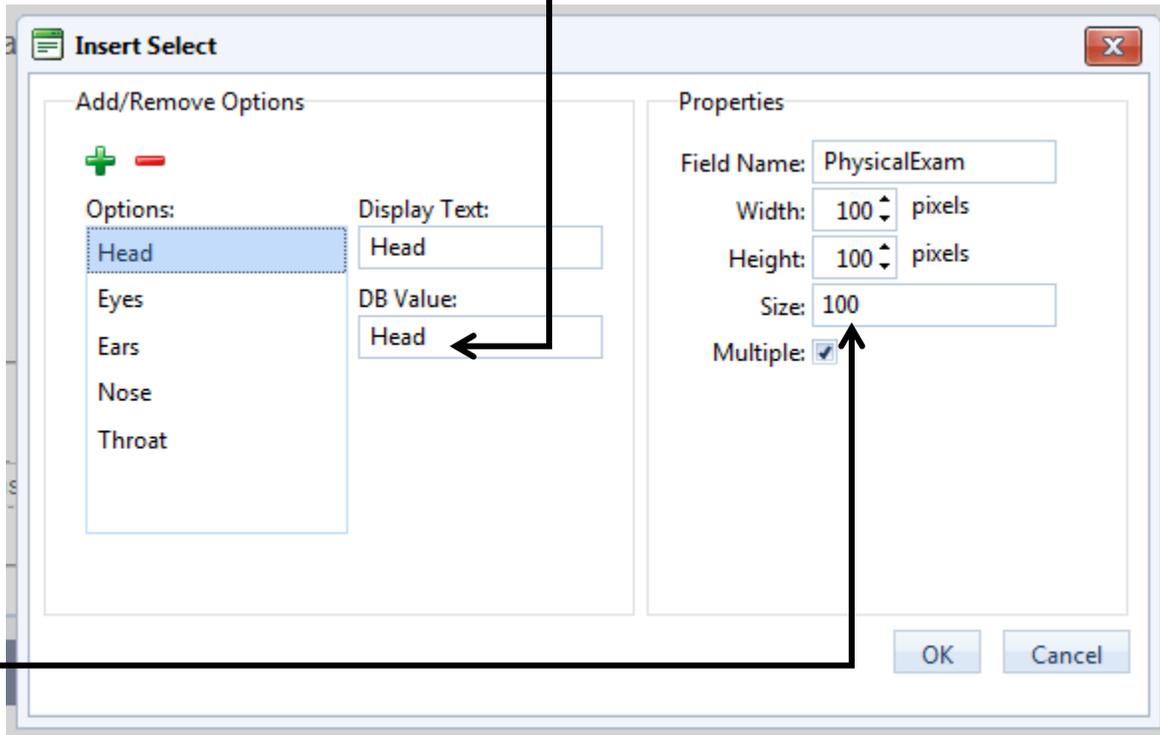
- When creating a select box from within the form element menu it is important to remember that you must provide a Field Name (spaces are not allowed), width, height, and size. For example, if you created a select box with 4 available options it would be best to size the select box as:

Width: 100 pixels

Height: 100 pixels

Size: 100

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- When creating radio buttons that belongs to the same 'Group' it is important to keep in mind that one of the radio button values must be set as the default. This way once the form is published one of the radio button values will automatically be selected.

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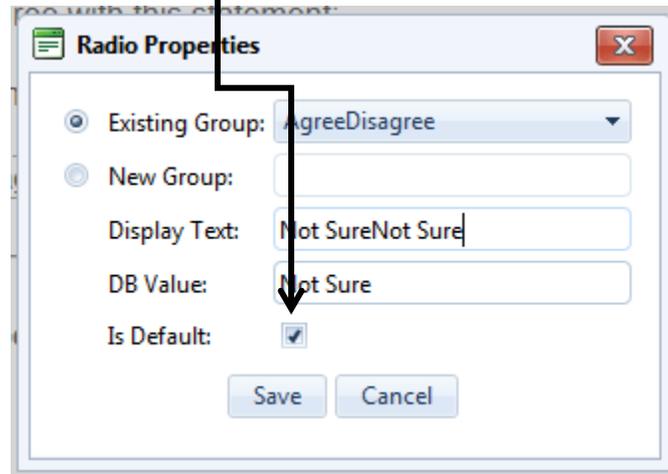
- When inserting a table within the Custom Form Builder it is important to keep in mind that each cell will automatically be adjusted once you start typing within the cell. The table's horizontal length will automatically adjust itself. **IMPORTANT: please keep in mind that if the table body extends horizontally past the printable area that you will be unable to save the form and thus must remove content from the non-printable region prior to saving. Below is an illustration showing a textbox that extends past the printable region of the form and cannot be saved:**

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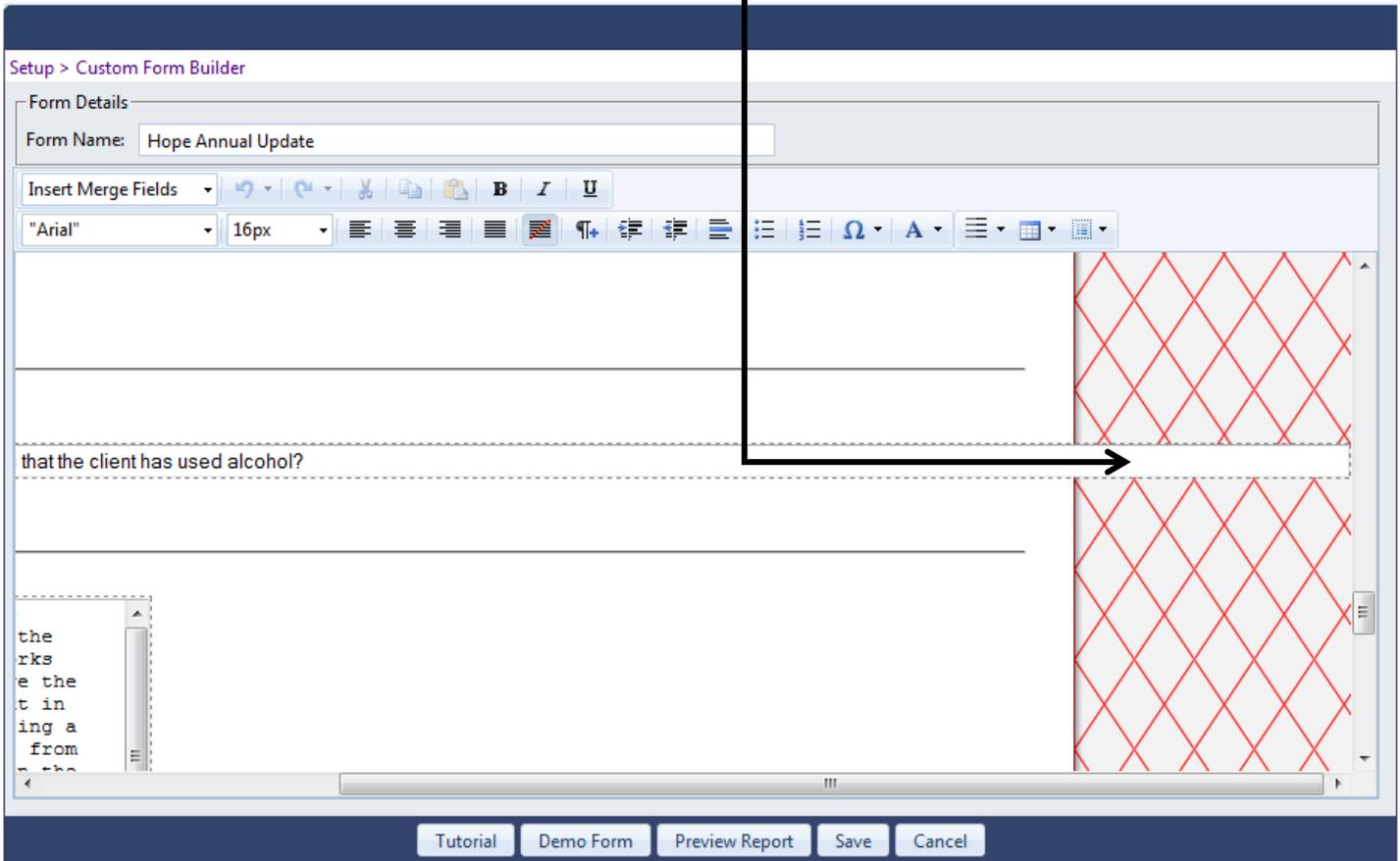
- If you ever make a mistake and accidentally delete text or form elements or make any immediate changes that you did not intend you then have the option to select the 'Undo' button the revert the last changes you made within the form.

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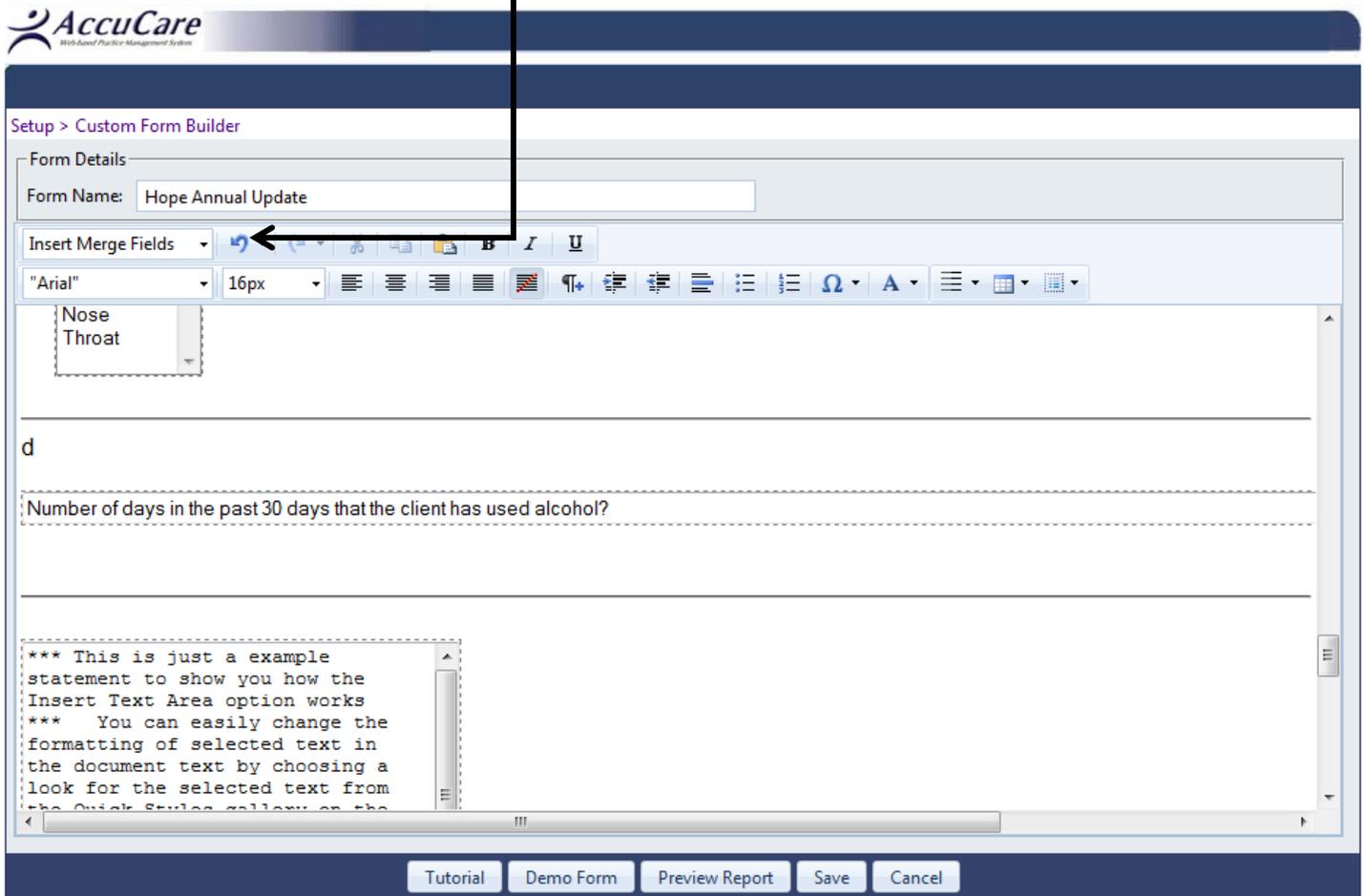
- Inserting Merge Fields will automatically merge specific data pulled from 'Client Intake' into the form that is tied to a specific client. Keep in mind, that if a merge field does not display data for a specific client then that is most likely due to the fact that this data was not originally enter into 'Client Intake' for that specific client.
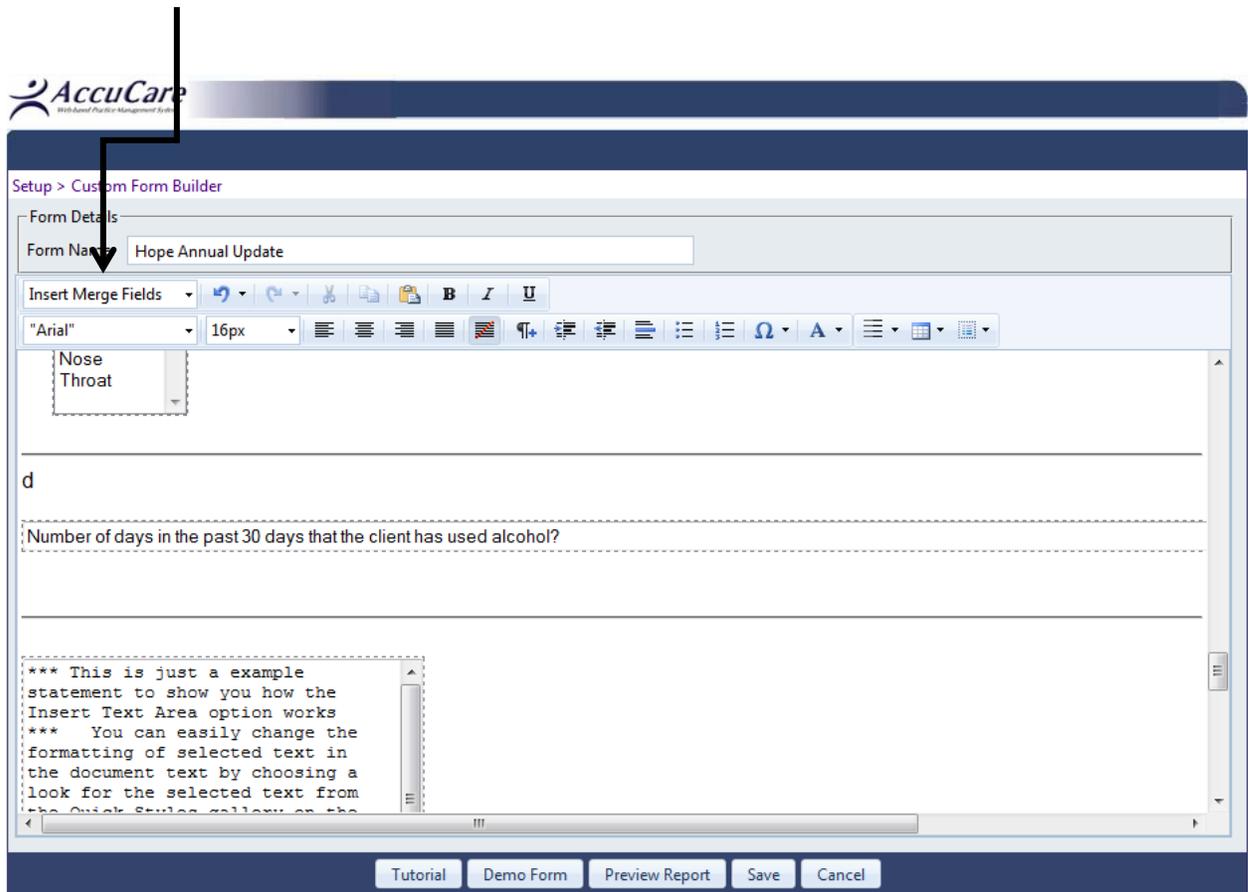
- If you are unable to remove a form element that was accidentally created then you may need to select the 'Undo' button to put your form back in a previous state.

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<u>Tips & Considerations for Custom Forms (non-administrative side of the house)</u>

- Please keep in mind when exporting form data to excel that you must first select a form and then select a date range for data that you would like to view. This export will show you data for ALL clients that have completed said custom form.

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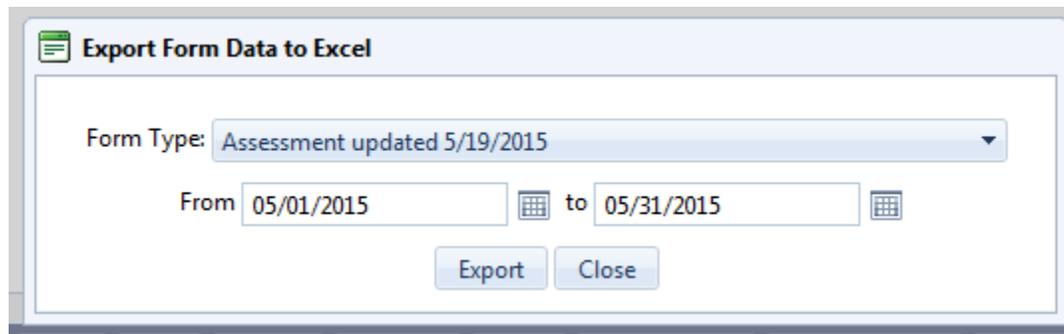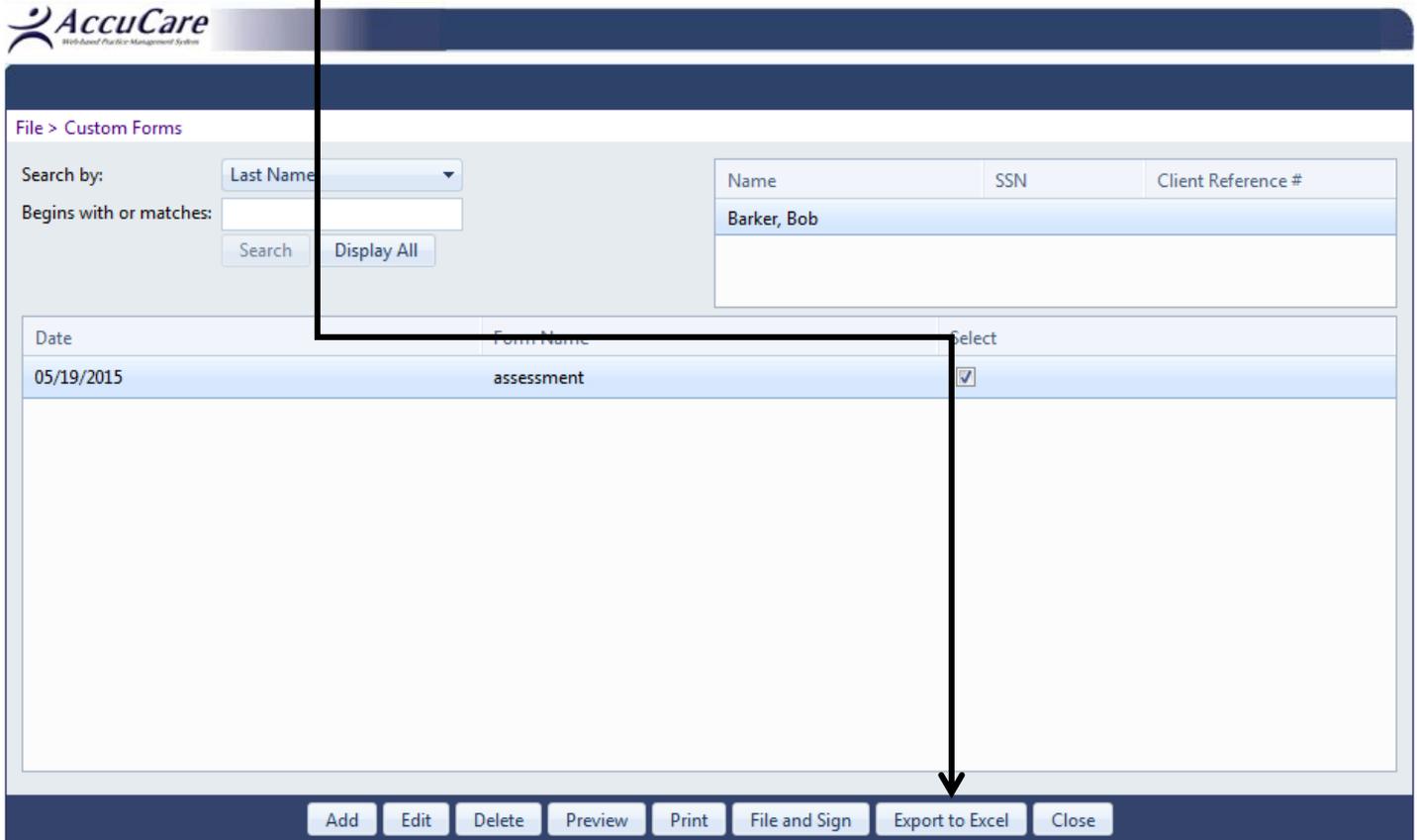
- Administrators whom need access to create and publish custom forms must first have the following value set to 'Allowed Areas' within the 'Customized' tab for said user profile:

Setup -> Custom Form Builder

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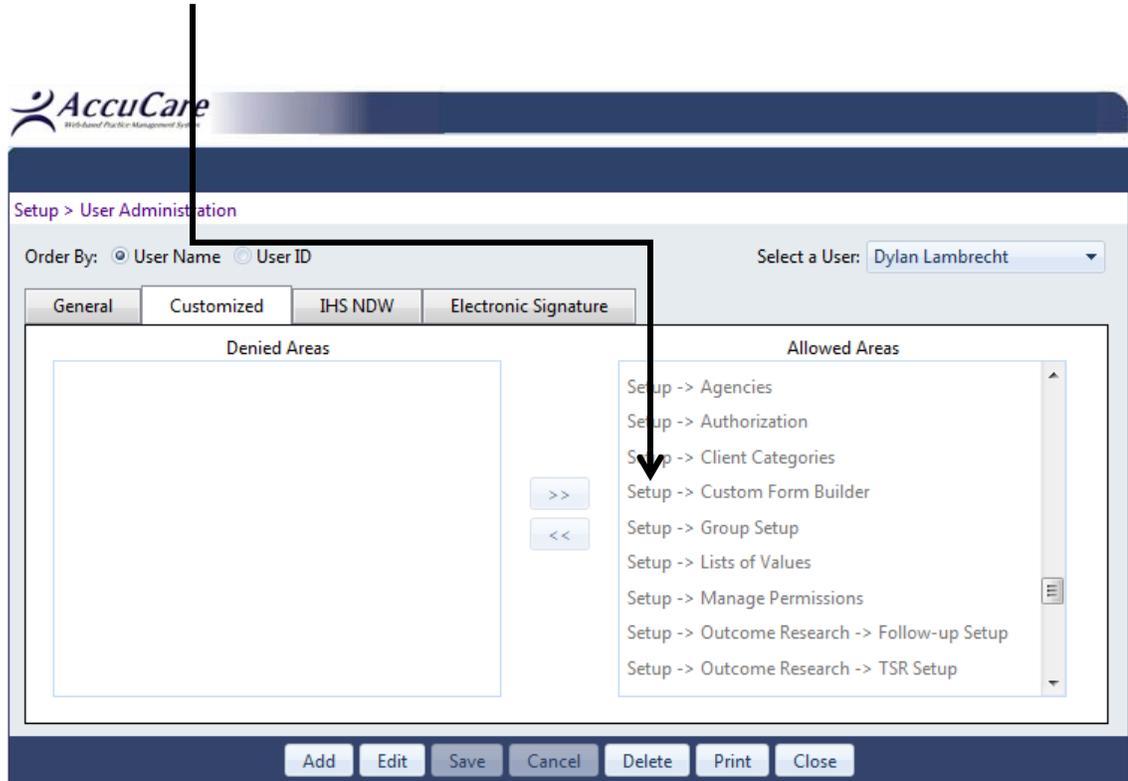
- Clinicians or counselors whom need access to add a published form to a specific client in the database must first have the following value set to 'Allowed Areas' within the 'Customized' tab for said user profile:

Custom Forms

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