

Assigning Custom Forms to Modules and Categories

Custom Forms can be assigned to a Module (Intake, Assessments, Admission, Scheduler, etc.) in addition to a Category (custom labeled by you). First, you need to create categories, then you can assign them to specific modules and those categories you created.

Creating Categories:

From the Custom Form Builder, select the **[Add/Edit Categories]** button. From here, you can create your own categories to assign to forms. This will help you filter through forms much quicker when using AccuCare.

CSOSA RSC Psychiatric Screening and Follow-up Forms	CSOSA	Assessments Client Intake Screening Tools/Supplements	Staff	05/28/2019
CSOSA RSC Psychiatric Screening and Follow-up Forms Copy	CSOSA		Staff	05/28/2019
CSOSA RSC Sick Call Request Form - R	CSOSA	Client Intake Scheduler	Staff	05/28/2019

Buttons: Add, Edit, Manage Forms, **Add/Edit Categories**, Create Copy, Delete, Demo Form, Preview Report, Put

Select the **[New]** button to create a new Category or **[Edit]** button to make changes to an existing one.

Custom Form Categories

- Arch Halfway House Forms
- CSOSA
- DUI Forms
- Inpatient Forms**
- Outpatient Forms

Selection: Inpatient Forms

Buttons: New, Edit, Save, Cancel, Delete, Close

Assigning Custom Forms to Modules and Categories

Assigning Custom Forms:

From the Custom Form Builder, select the **[Manage Forms]** button at the bottom of the screen. From here you can assign your form to appear in specific modules and/or specific categories (that you created).

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Buttons: Add Edit **Manage Forms** Add/Edit Categories Create Copy Delete Demo Form Preview Report Put

This allows you to set up two layers of filtering when choosing a Custom Form to administer.

Layer 1: You can select what modules you would like the form to appear in:

The screenshot shows the 'Manage Forms' dialog box for the form '30 Day AFTERCARE PLAN'. The 'Assigned Module(s)' dropdown is open, showing a list of modules with checkboxes. The 'Client Intake' module is selected. A red box highlights the 'Assigned Module(s)' dropdown, and a red arrow points to the 'Form Name' field.

Form Name:	30 Day AFTERCARE PLAN
Assigned Module(s):	2 items checked
Assigned Categories:	

- Admission/Discharge
- Assessments
- Client Intake
- Medication Management
- Scheduler
- Screening Tools/Supplements

Layer 2: You can also select which Categories you would like the Form to appear in:

The screenshot shows the 'Manage Forms' dialog box for the form '30 Day AFTERCARE PLAN'. The 'Assigned Categories' dropdown is open, showing a list of categories with checkboxes. The 'DUI Forms', 'Inpatient Forms', and 'Outpatient Forms' categories are selected. A red box highlights the 'Assigned Categories' dropdown.

Form Name:	30 Day AFTERCARE PLAN
Assigned Module(s):	Admission/Discharge
Assigned Categories:	3 items checked

- Arch Halfway House Forms
- CSOSA
- DUI Forms
- Inpatient Forms
- Outpatient Forms

Assigning Custom Forms to Modules and Categories

Using Filters to Select Your Custom Form

Now that you have set up your Custom Form to appear in specific modules and categories, you can use them the next time you are administering a Custom Form. Below is an example.

Example: User wants to administer a specific Inpatient Custom Form from Client Intake

- 1) From Client Intake → Custom Forms tab, select your client, then click on **[Add]**

The screenshot shows the 'Client Intake' interface. At the top, there are search filters for Last Name, Date Of Birth, Phone, SSN, Client Reference #, and Billing Reference #. Below these are fields for Client Name, Level of Care, and Location. A table lists client information with columns for Name, DOB, Phone, SSN, Client Ref #, and Billing Ref #. The 'Custom Forms' tab is selected and highlighted with a red box. Below the tabs is an 'Add' button, also highlighted with a red box. A table below shows a list of forms with columns for Date, Form Name, Categories, Added By, Edit, Delete, Print, File & Sign, and Signed. One form is listed: 09/06/2017, CSOSA RSC Diet Order Form, CSOSA, Staff.

- 2) From the Create New Form window, select the Category and the Form.

The screenshot shows the 'Create New Form' window. The 'Select Category:' dropdown menu is open, showing a list of categories: Arch Halfway House Forms, CSOSA, DUI Forms, Inpatient Forms, and Outpatient Forms. The 'Inpatient Forms' option is highlighted with a blue background and a red arrow pointing to it.

- 3) Note that the list is shorter because the Category filtered down the results.

The screenshot shows the 'Create New Form' window. The 'Select Form:' dropdown menu is open, showing a list of forms: ASAM - Discharge Form, Assessment of Self-Administration of Medications, and Authorization for Disclosure of Information. The 'Assessment of Self-Administration of Medications' option is highlighted with a blue background and a red arrow pointing to it.

- 4) After selecting the Form, click on **[Create New Form]** button and begin.