



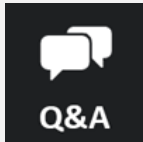
extended**Reach**
powered by **k**care

FORMS MANAGEMENT

System Administrator Training



Participants will be muted by default



Questions? Submit using Zoom's Q&A function.

Agenda



Configurator Overview



Custom Form Builder



Creating/Editing a Custom Form



Configurator Overview

- **Explanation and Purpose of the Configurator**

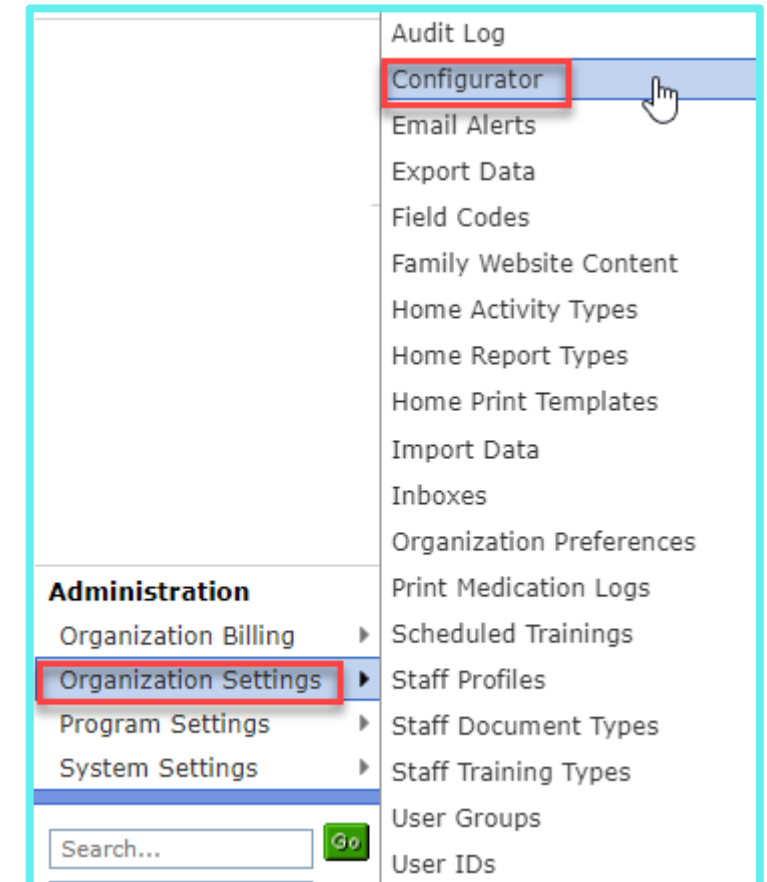
- ❖ The Configurator is a consolidated list of your agency's Program and Home Activity Types, Report Types, and Print Templates.
- ❖ Allows you to see all these items in one list and sort them in different ways.

- **Security Level Requirements and Access**

- ❖ You must be an Agency Administrator to access the "Administration" menu on the left side of your Workspace.

- **Go to**

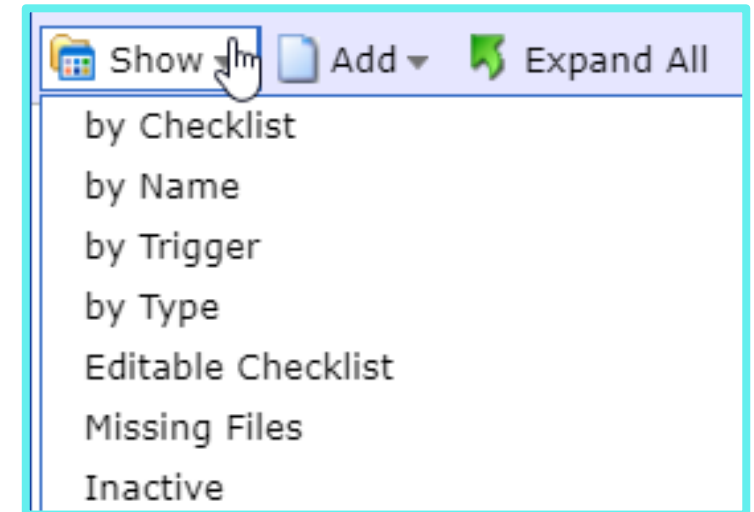
Administration → Organization Settings → Configurator



Navigate the Configurator

- There are different ways you can sort the items in the Configurator. To view the grouping options, hover over the “Show” button in the action bar.

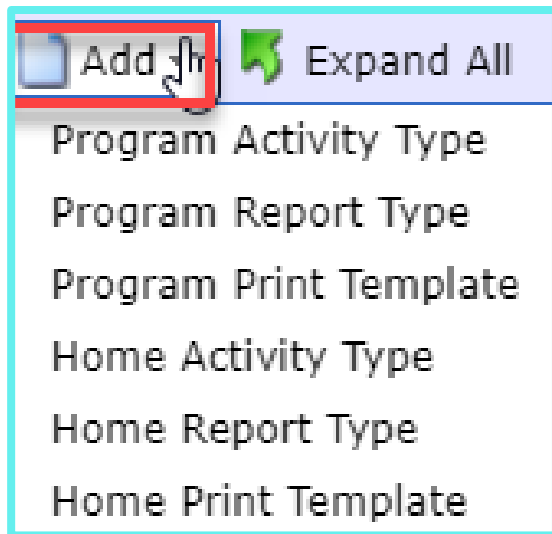
- By Checklist – Compliance checklist categories
- By Name – Alphabetical order
- By Trigger – Creation trigger, (i.e., by Admission, by Placement, etc.)
- By Type – Activity, Report, or Print Template
- Editable Checklist – Quick access to edit a form
- Missing Files – Items that should have a Microsoft Word document or other file attachment but do not
- Inactive – Items that have been marked as inactive



Add – Types

Program = Cases/Clients Forms

Home = Home/Facility Forms



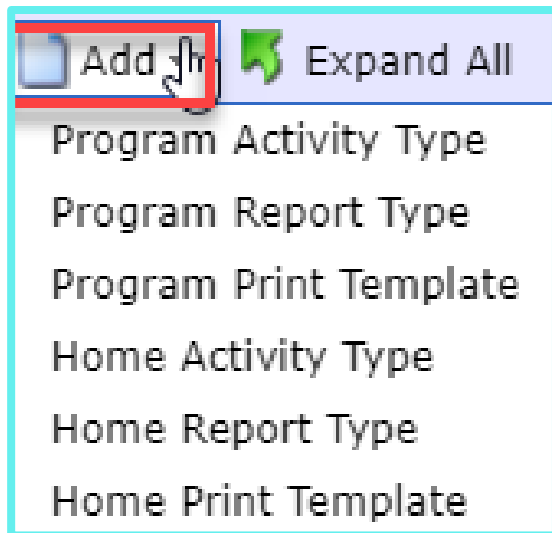
Activity Types

- ❖ Events that occur at a certain point in time and need to be documented.
- ❖ Usually have an associated case note or narrative and may also have associated file attachments.
- ❖ Include – Medicals, social work contacts such as a home visits, or collateral contacts such as phone calls, letters, or email.

Add – Types

Program = Cases/Clients Forms

Home = Home/Facility Forms



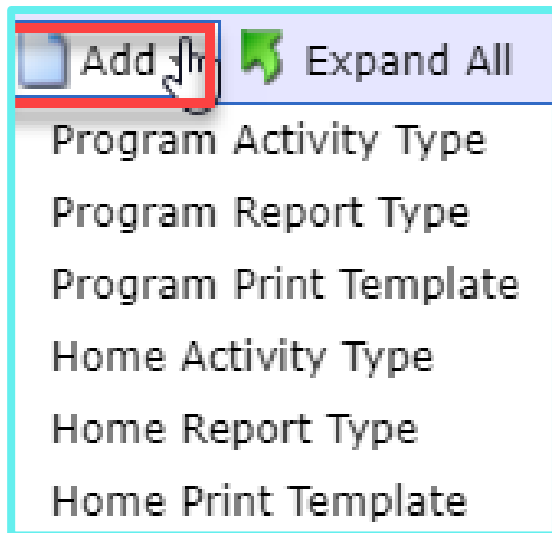
Reports Types

- ❖ Documents that are either collected or generated/written by your staff, and often have a due date and an associated file.
- ❖ Examples – written documents, such as service plans, assessments, home studies, or collected documents, such as birth certificates or social security cards.

Add – Types

Program = Cases/Clients Forms

Home = Home/Facility Forms

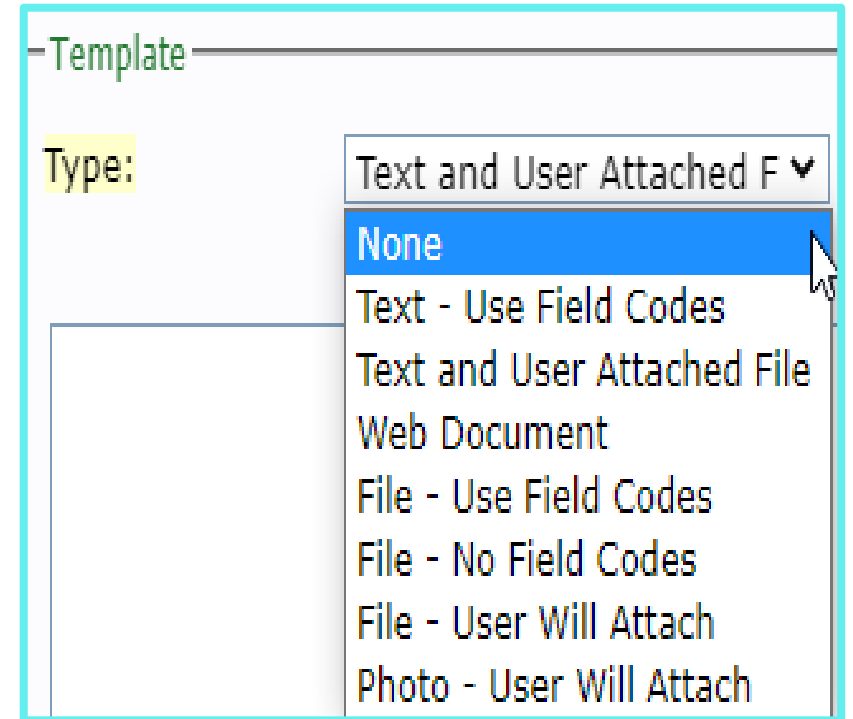


Print Templates

- ❖ Printable forms that auto-fill with information from a Program or Home.
- ❖ Not saved/stored in the system but can be regenerated at any time with up-to-date information from the program or home database.
- ❖ Examples – face sheets or case note summaries.

Form Template Types

- None
- Text – Use Field Codes – Enter text into a narrative box using field codes. Once completed, the narrative box will display the field code information
- Text and User Attached File – Allows users to add a text narrative as well as attach a file.
- Web Document – Copy and paste a word template onto the screen; like working with google docs. Can create documents from scratch; gives look and feel of a word document.
- **File – Use Field Codes – Upload Word documents that use extendedReach field codes to populate the fields; requires eR plugin**
- **File – No Field Codes – Upload documents without field codes (pdf)**
- File – User Will Attach – User will attach a file (PDF or Word)
- Photo – User Will Attach – User can attach a photo(s)



The screenshot shows a form titled "Template" with a "Type:" label. A dropdown menu is open, displaying the following options: "Text and User Attached F", "None", "Text - Use Field Codes", "Text and User Attached File", "Web Document", "File - Use Field Codes", "File - No Field Codes", "File - User Will Attach", and "Photo - User Will Attach". The "None" option is currently selected and highlighted in blue. A mouse cursor is visible over the "None" option.

FORM TEMPLATE TYPES

Text - Use Field Codes	 Includes Related Narrative Box	 Field codes in narrative		
Text and User Attached File	 Includes Related Narrative Box	 Attach a file		
Web Document	 Similar to Word Document	 Field codes in document	 Attach a file	 Can be manipulated
File - Use Field Codes	 Requires eR plug-in	 Associate blank Word document	 Saved in eR cloud, not on desktop	 Field codes in document
File - No Field Codes	 Requires eR plug-in	 Associate blank PDF document	 Saved in eR cloud, not on desktop	
File - User Will Attach	 Attach a file			
Photo - User Will Attach	 Attach a photo	 Can indicate as profile picture		
None	 Commonly used for Custom Form			

eR Plug-In

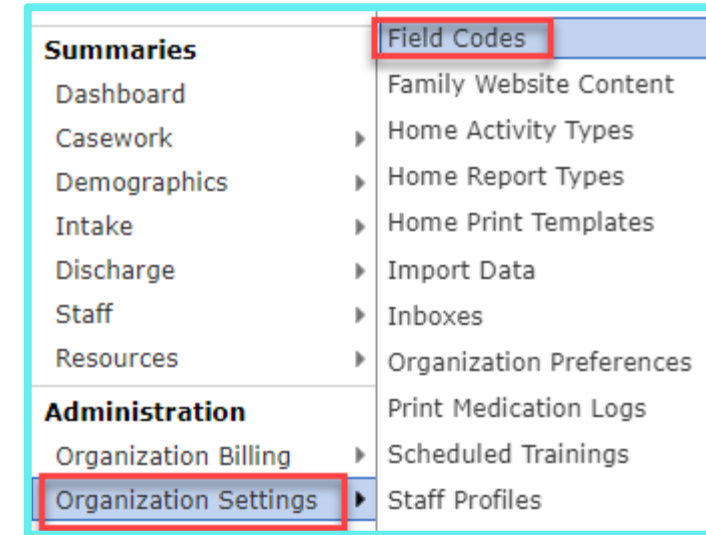
Software installed on your computer that will allow you to edit word documents directly on the extendedReach website.

FORM TEMPLATE TYPES

Text - Use Field Codes	 Includes Related Narrative Box	 Field codes in narrative		
Text and User Attached File	 Includes Related Narrative Box	 Attach a file		
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None	 Commonly used for Custom Form			

Field Codes

- Add field codes to forms to pull information from the system.
- Use button to Show Frequently used codes
- Use Ctrl + F to search
- Create your own frequently used field code lists for easy access
- Download into Excel for easy access.
- If can't find one, send a support request



A screenshot of a 'Show Frequently Used' dialog box. The dialog has a header bar with a 'Show Frequently Used' button (highlighted with a red box), an 'Excel' button (highlighted with a yellow box), and a 'Help' link. Below the header is a table with three columns: 'Type', 'Code', and 'Description'. The table lists various field codes for 'Activity' and 'Branch' types.

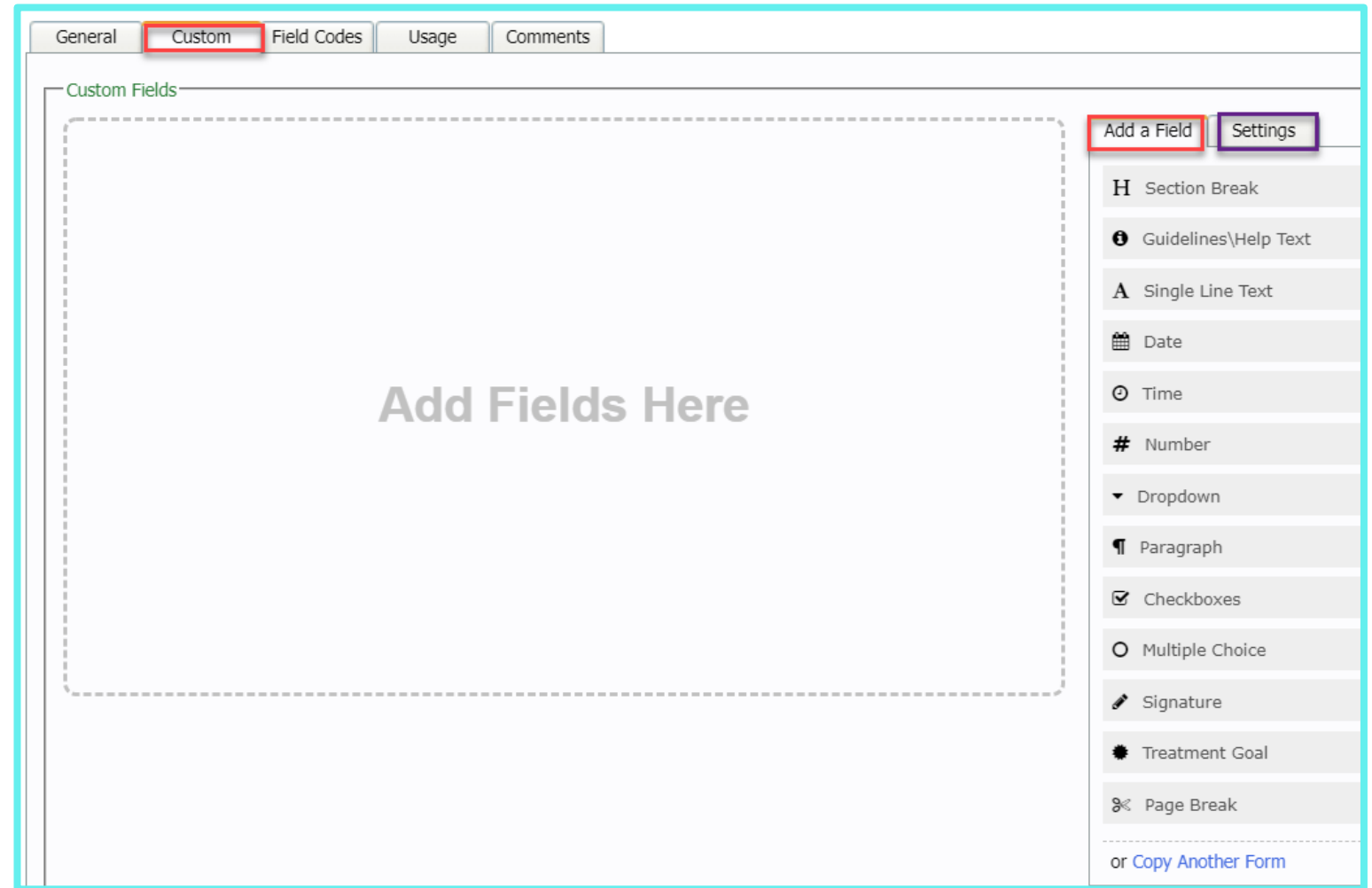
Type	Code	Description
Activity	<YCF1>	Activity Custom Field Value 1
Activity	<YCF10>	Activity Custom Field Value 10
Activity	<YCF2>	Activity Custom Field Value 2
Activity	<YCF3>	Activity Custom Field Value 3
Activity	<YCF4>	Activity Custom Field Value 4
Activity	<YCF5>	Activity Custom Field Value 5
Activity	<YCF6>	Activity Custom Field Value 6
Activity	<YCF7>	Activity Custom Field Value 7
Activity	<YCF8>	Activity Custom Field Value 8
Activity	<YCF9>	Activity Custom Field Value 9
Activity	<YAD>	Activity Date
Branch	<BA1>	Branch Address 1
Branch	<BA2RB>	Branch Address 2 - remove if blank
Branch	<BAC>	Branch City

Custom Tab Options

- Add up to 10 custom fields for a simple form
 - Examples: adding field to your uploaded documents to indicate specific information such as name or type of form
 - Misc. Education Documents: single line text field to add the name of the form and then check to display on description so it will appear in case or home file with description.
- Or turn on the Custom Form Builder Setting for access to Custom Form Building tools
 - Drag & Drop interface or simply click on a field and it will appear at the end
 - Settings – Click on a field, and then click the Settings tab to customize that field.
 - To delete a field, hover over the field and click the red X

Creating/Editing a Custom Form

- Drag & Drop interface or simply click the field and it will appear at the end of field list
- Create handbooks, acknowledgements, intake packets, etc.



The screenshot displays the 'Custom Fields' interface. At the top, there are five tabs: 'General', 'Custom' (highlighted with a red box), 'Field Codes', 'Usage', and 'Comments'. Below the tabs, the main area is titled 'Custom Fields' and contains a large dashed rectangular box with the text 'Add Fields Here' in the center. To the right of this box, there are two buttons: 'Add a Field' (highlighted with a red box) and 'Settings' (highlighted with a purple box). Below these buttons is a list of field types, each with an icon and a label: 'Section Break' (H icon), 'Guidelines\Help Text' (i icon), 'Single Line Text' (A icon), 'Date' (calendar icon), 'Time' (clock icon), 'Number' (# icon), 'Dropdown' (dropdown arrow icon), 'Paragraph' (p icon), 'Checkboxes' (checkbox icon), 'Multiple Choice' (radio icon), 'Signature' (pen icon), 'Treatment Goal' (star icon), and 'Page Break' (scissors icon). At the bottom right, there is a link that says 'or Copy Another Form'.

GeneralCustomField CodesUsageComments

Custom Fields<S7HDR-IND-EXP-PID>

Section Break

Guidelines \ Help Text - Normal

Guidelines \ Help Text - Bold

Guidelines \ Help Text - Information

Guidelines \ Help Text - Warning

Uses:
Instructions - set to do not print
Information that you don't want the user to edit - for intake forms, handbooks, policies etc.

Single Line Text (Conditional)
add up to 32,000 characters

Date

Time

Number

Date of Birth

Case Manager

<CW>

Dropdown

- Not Specified -

Paragraph
Unlimited characters

Add a FieldSettings

HSection Break

iGuidelines\Help Text

ASingle Line Text

Date

Time

#Number

▼Dropdown

¶Paragraph

☑Checkboxes

○Multiple Choice

✍Signature

⚙Treatment Goal

⌘Page Break

or [Copy Another Form](#)

Checkboxes - Multi-select

- | | | | |
|-----------------------------------|--|-----------------------------------|-----------------------------------|
| ☐ Option 1 | ☐ Option 2 | ☐ Option 3 | ☐ Option 4 |
| ☐ Option 5 | ☐ Option 6 | ☐ Option 7 | ☐ Option 8 |
| ☐ Option 9 | ☐ Other: <input type="text"/> | | |

Multiple Choice - Radio Button

- ☐ Yes ☐ No ☐ Other:

Signature

[Clear Signature](#)

Treatment Goal

[Select a Goal](#)

Page Break

Add a Field

Settings

H Section Break

i Guidelines\Help Text

A Single Line Text

📅 Date

🕒 Time

Number

▼ Dropdown

¶ Paragraph

☑ Checkboxes

◯ Multiple Choice

✍ Signature

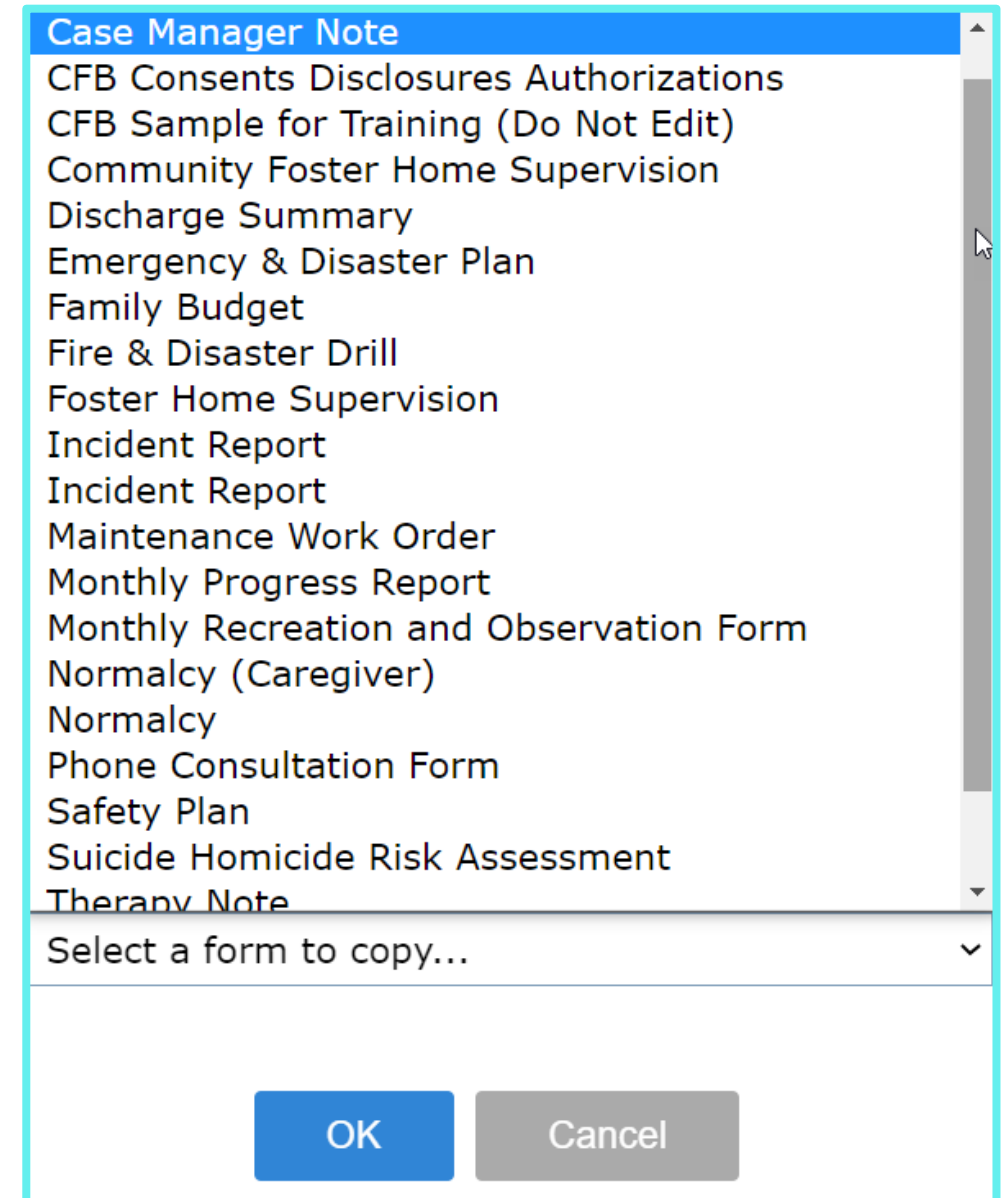
⚙ Treatment Goal

⌂ Page Break

or [Copy Another Form](#)

Copy Another Form

- Provides a pop-up of all custom forms that have been created and saved in your extendedReach system.
- Select the form to copy over and click Ok.
- Then edit to delete items and add additional fields.
- Saves from building from scratch.
- Used to:
 - Change activity/report type
 - Retire a custom form and copy fields to create a new version (could also clone which includes the triggers, next due dates and other settings)



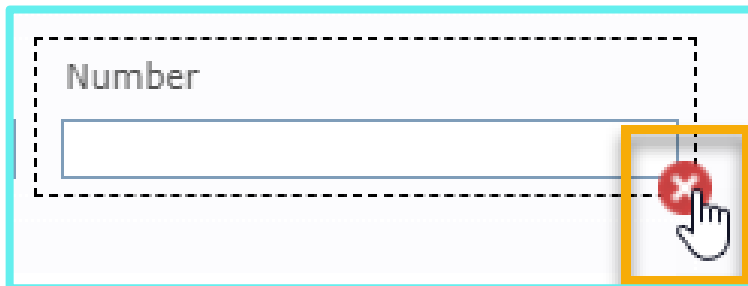
The screenshot shows a dialog box titled "Case Manager Note". It contains a list of forms that can be copied. The list is as follows:

- CFB Consents Disclosures Authorizations
- CFB Sample for Training (Do Not Edit)
- Community Foster Home Supervision
- Discharge Summary
- Emergency & Disaster Plan
- Family Budget
- Fire & Disaster Drill
- Foster Home Supervision
- Incident Report
- Incident Report
- Maintenance Work Order
- Monthly Progress Report
- Monthly Recreation and Observation Form
- Normalcy (Caregiver)
- Normalcy
- Phone Consultation Form
- Safety Plan
- Suicide Homicide Risk Assessment
- Therapy Note

Below the list is a text input field with the placeholder text "Select a form to copy...". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Field Settings

- Settings – Click on a field, and then click the Settings tab to customize that field.
- Refer to Handout – Custom Form Builder Fields for details on settings for each field.
- To delete a field, simply hover over the field and click on the red X



Add a Field

Settings

Label

Paragraph

Default

Unlimited characters

☐ Copy Most Recent (if available)

Width

100% ▼

Height

Small ▼

☐ Show only if another field is...

☐ Do not print if blank

☐ Show in description

☐ Required

Field: 6

Goals

- Cannot copy goals from one custom form to another as in kcare
- Use Treatment Tab on case record to document goals and can use field codes to copy specific goal fields to custom forms (case notes, service plans, daily logs, etc.)

Status	Name
In Process 07/01/2021 - 09/30/2021	Behavior (Primary) Client will reduce verbal and physical aggression towards peers and authority.
In Process 07/01/2021 - 09/30/2021	Social (Primary) Improve social skills and interactions with peers adults

Goal from Treatment Tab using field codes

Behavior
Client will reduce verbal and physical aggression towards peers and authority.
07/01/2021 - 09/30/2021
Client will have ZERO instances of verbal or physical aggression towards peers for 30 consecutive days. Client will not threaten to harm others for 60 consecutive days. Client will learn (5) ways to manage his anger towards others and implement (2) strategies monthly. Client will learn assertive communication skills. Specifically, he will learn to ask for, rather than demand. Client will utilize a behavior plan to reduce instances of physical aggression.
Responsible Parties: Sheldon, FP and Therapist

Label
Goal from Treatment Tab using field codes

Default
<TG-TG_GoalCat-Behavior>
<TG-TG_Goal-Behavior>
<TG-TG_Start-Behavior> - <TG-TG_End-Behavior>
<TG-TG_Actions-Behavior>
Responsible Parties: <TG-TG_Responsible-Behavior>

☐ Copy Most Recent (if available)

QUESTION

& ANSWER

Support Resources



Your Agency's
System
Administrator



Access the User
Guide



Contact Support
or Customer
Success



Submit an Idea