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CONFIGURATOR

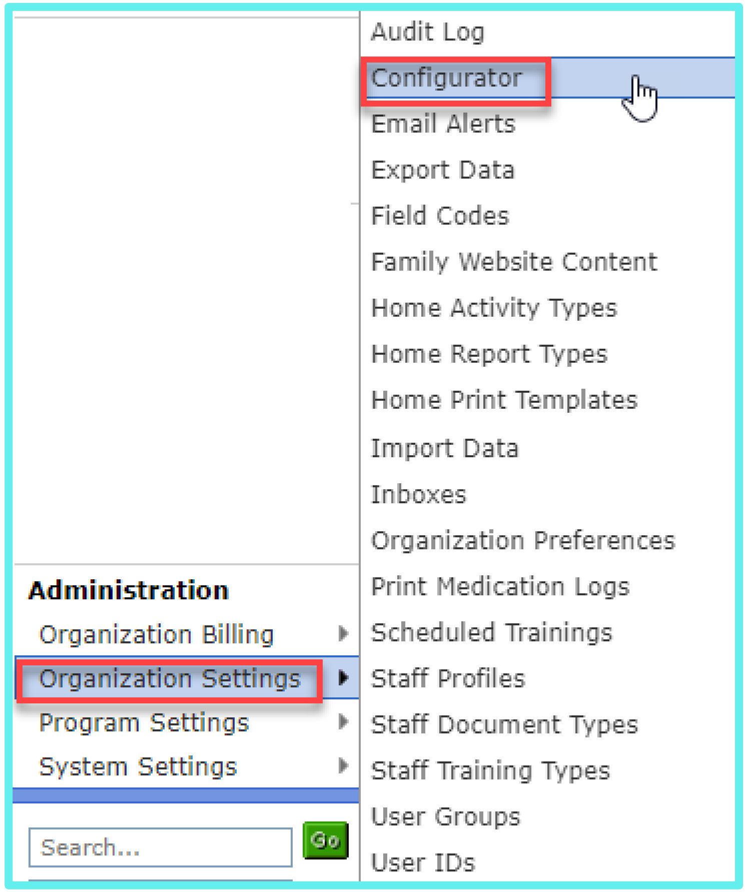
System Administrator Training

Agenda

- Configurator Overview
- Activities, Reports, Print Templates
- Settings, Triggers, Next Due Dates
- Support Resources

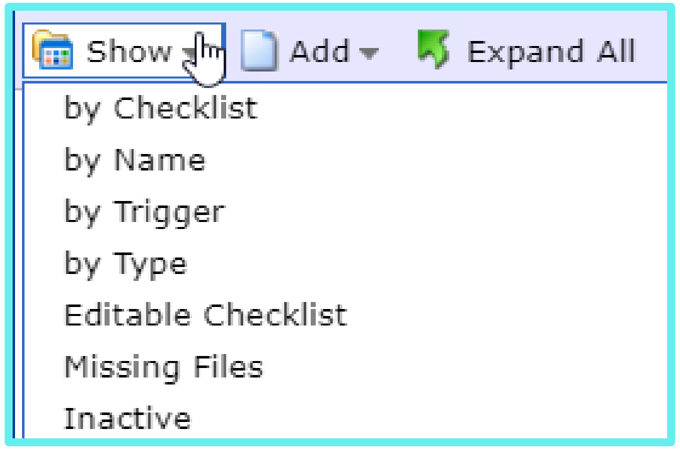
Configurator Overview

- The Configurator is a consolidated list of your agency's Program and Home Activity Types, Report Types, and Print Templates.
  - The Configurator 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 "Organization Settings" and click on "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



Configurator Report

Configurator screen is a Report

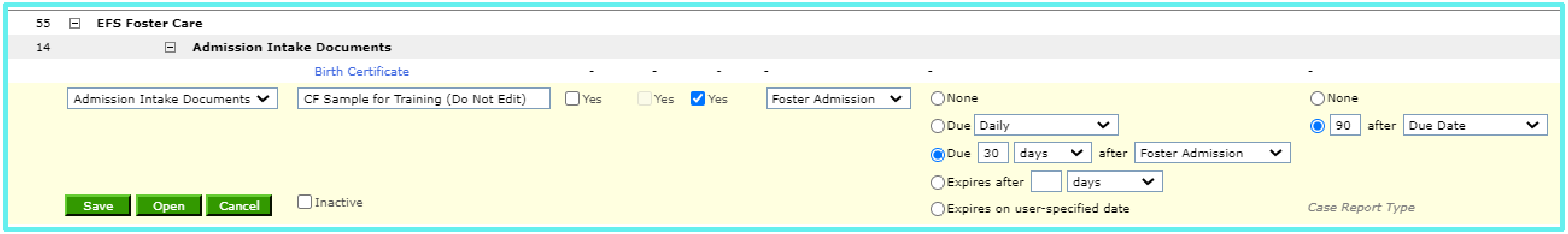
- Total – Total number of items per grouping option selected
- Name – Activity, Report, or Print Template name
- Optional – indicates if item is an optional compliance checklist item
- FFW – Indicates if item will display in Foster Family Website
- Type – Indicates an Activity, Report, or Print Template
- Checklist – Indicates if item is in the compliance checklist
- Approval – Indicates if item requires supervisory approval

Export to Excel

- Custom Fields – Indicates if item has custom fields (# of fields) or if using Form Builder
- Template Type – Type of template (File – Codes, File – No Codes, Text, Text + User Attach, or None)
- Number of Field Codes – Indicates whether the item has field codes, and if so, how many
- Available To – Indicates if the item is restricted to certain categories of cases or homes
- Due/Expires – Indicates if the item has due dates or expiration dates
- Repeat Every – Indicates if the item has a repeating due date

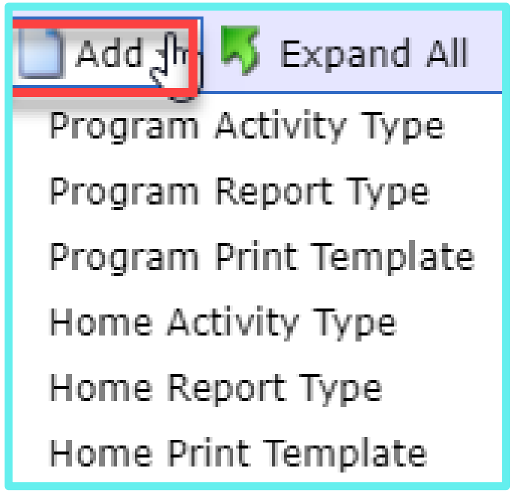
Editable Checklist

- Quick access to edit a form to change or update
  - Checklist location
  - Form Name
  - Optional Status
  - Approval
  - Trigger
  - Due/Expires or
  - Repeat information

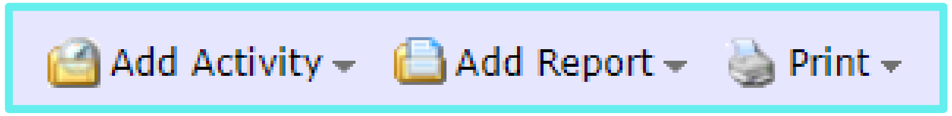


Add – Types

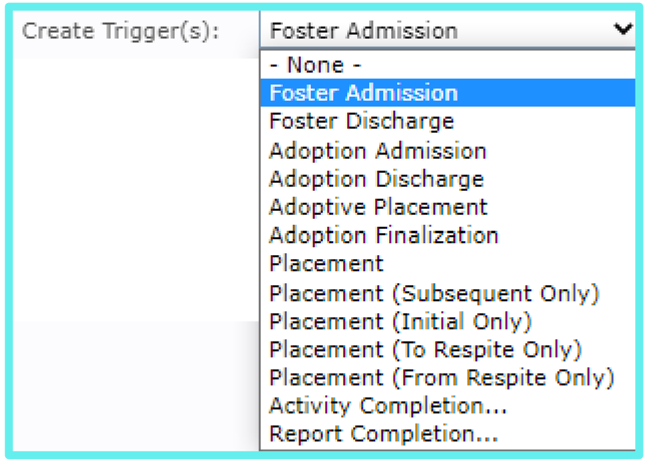
- **Activity Types**
  - Events that occur at a certain point in time and need to be documented.
  - Usually have an associated case note or narrative and may also have associated file attachments.
    - Examples – Medicals, social work contacts, home visits, phone calls, letters, or email.
- **Reports Types**
  - Documents that are either collected or generated/written by your staff, and often have a due date and an associated file.
    - Examples – service plans, assessments, home studies, or collected documents such as birth certificates, social security cards.
- **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
    - Examples – face sheets or case note summaries.



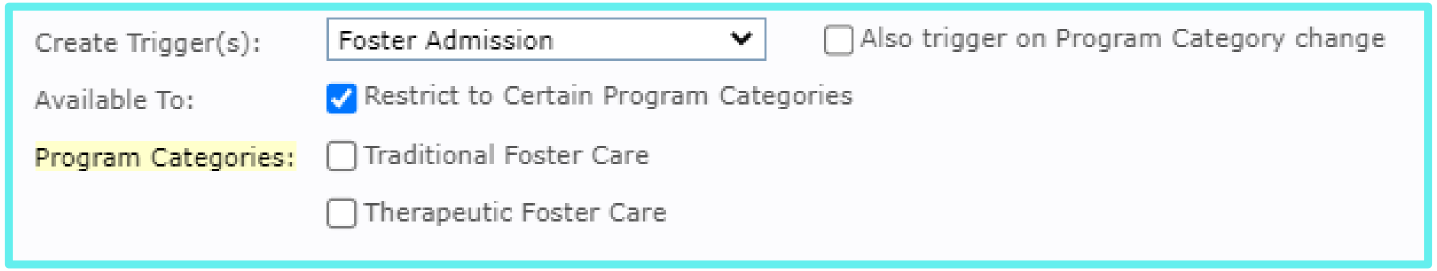
- Program = Cases/Clients Forms
- Home = Home/Facility Forms



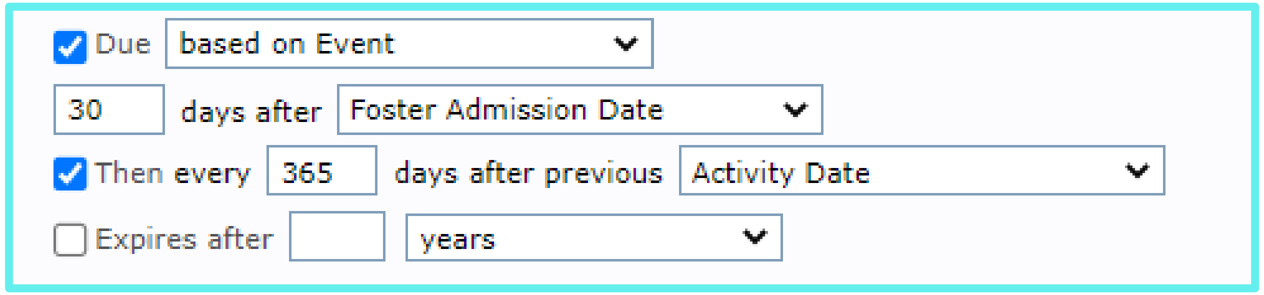
Triggers and Next Due Dates – Programs (Clients)



- Set rules for when a form will trigger (admission, discharge, etc.) and repeating due dates
- Restrict to specific Categories (program, levels, etc.)
- Different options for rules based on:
  - Event
  - Age – Schedule or Birthday
  - Formula
  - Daily
  - Weekly
  - Monthly
  - Custom

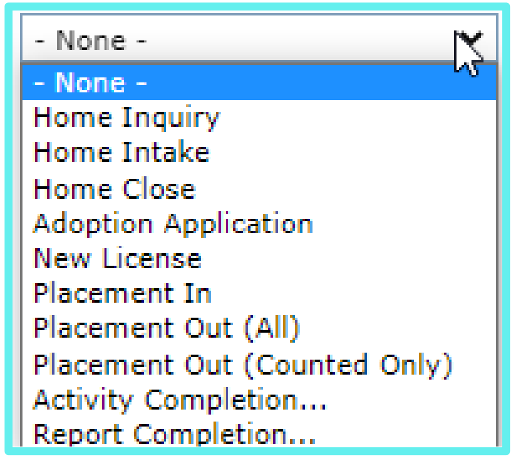


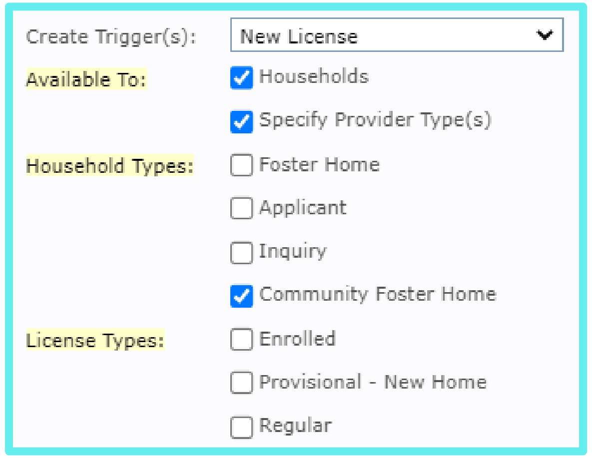
- Due Date & Next Due Dates
- Expires after
  - Years
  - Months
  - Days
  - User-specified date

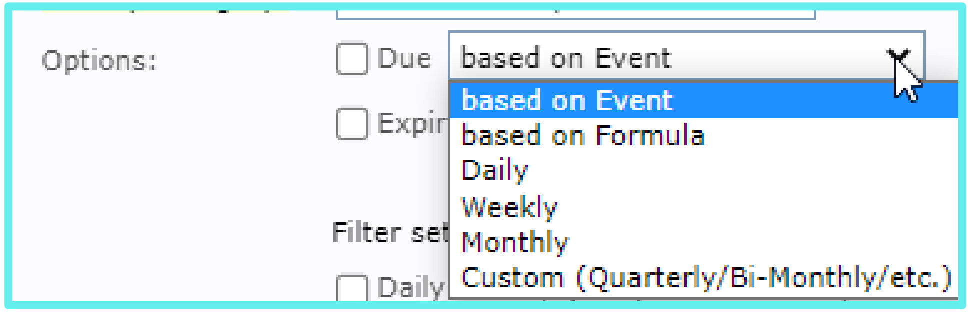


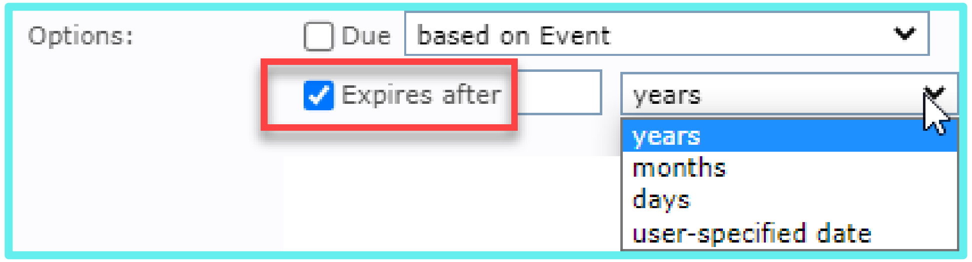
Triggers and Next Due Dates – Homes

- Set rules for when a form will trigger (Intake date, close date, new license, etc.) and repeating due dates
- Restrict to specific household/facility types or license types
- Different options for rules based on
  - Event
  - Formula
  - Daily
  - Weekly
  - Monthly
  - Custom
- Due Date & Next Due Dates
- Expires after
  - Years
  - Months
  - Days
  - User-specified date



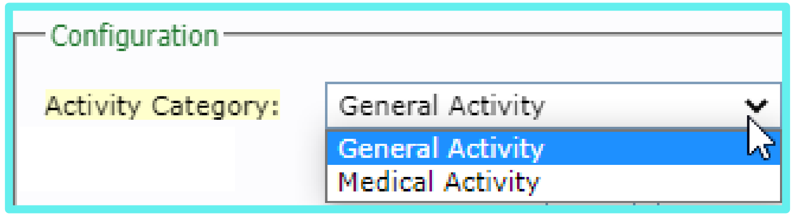


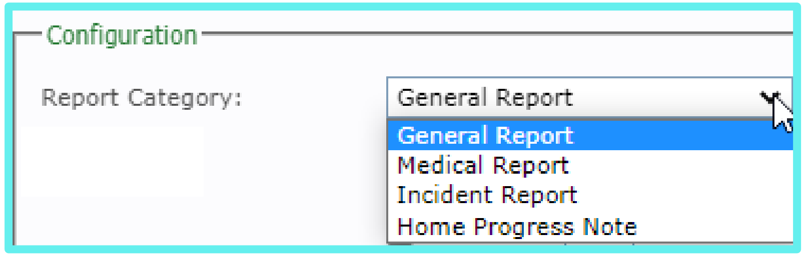


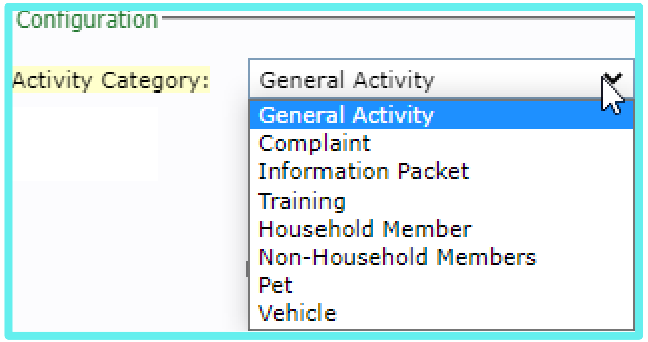


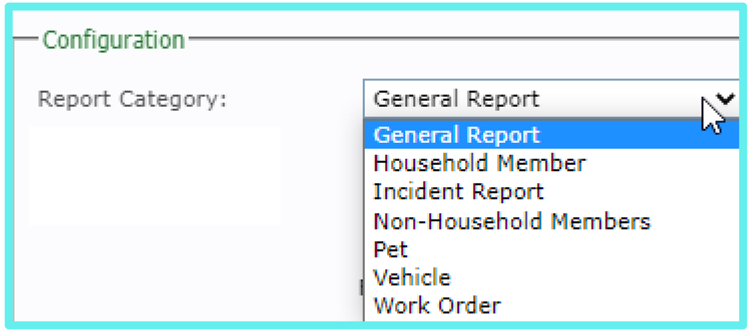
Activity or Report Category

- Provide additional functionality:
  - Medical Activity – options display to identify medical, dental, vision etc. for Case Health Summary Tab
  - Incident Report – populates Summaries > Casework > Incident Report (side menu report)
  - Training – summary of training hours for foster homes in reports and on FFW
  - Household, Non-household members,– identifies people tab individuals to trigger forms
  - Pet, Vehicles – identified on foster home general tab and can trigger for requirements
  - Work Order – specific report under Summaries > Casework



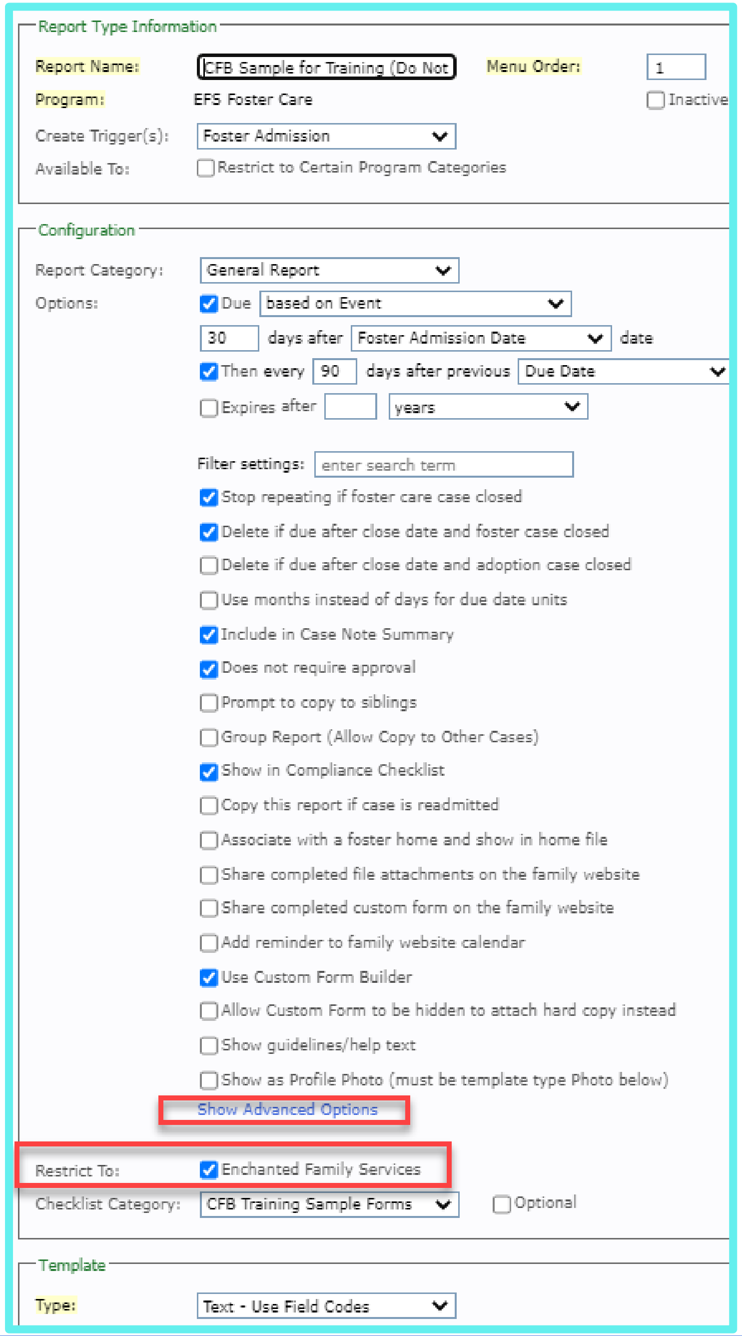






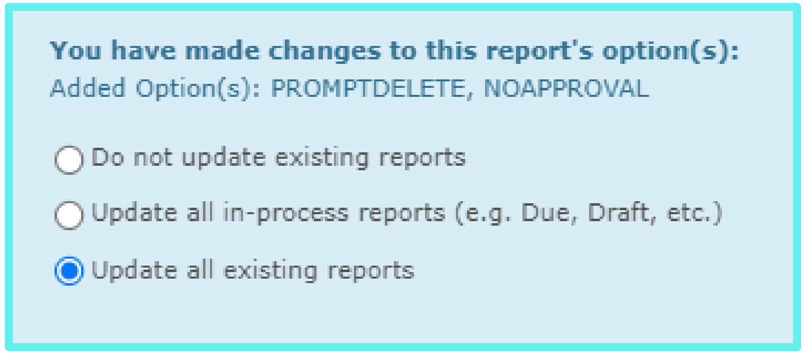
Configuration Settings

- Always select “Show Advanced Options” to see all options
- Restrict to – select your agency
- Approval – require approval vs does not require approval
- Stop Repeating if case closed/Delete if due after close date and case closed
- Show in Compliance Checklist – then select checklist category
- Use Custom Form Builder – enables the custom form building functionality
- Include in Case Note Summary – print template that allows user to select this form and pull all based on a timeframe; chronological report for case or home
- Copy this activity/report if case readmitted – SSN, birth certificates, etc. forms that don’t change will be copied to the readmitted case
- Share completed activity files on the family website – will change forms to pdf and drop onto FFW when form completed.
- Show Guidelines/Help Text – displays a new field to add instructions to that won’t appear on the report
- Use Formula – contact support if complicated criteria to trigger/repeat the document and need a formula



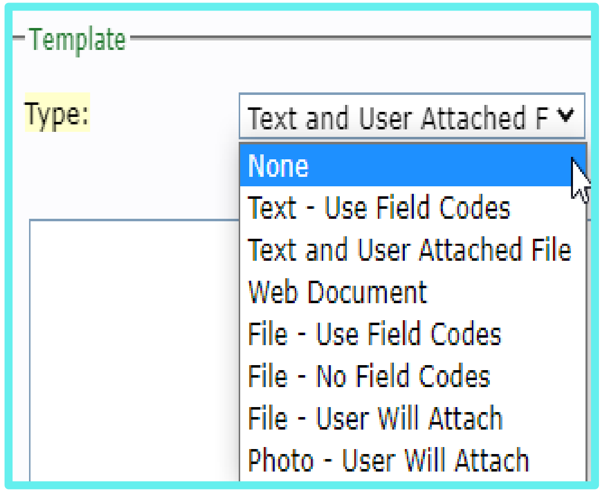
Changes to Settings or Custom Form Fields

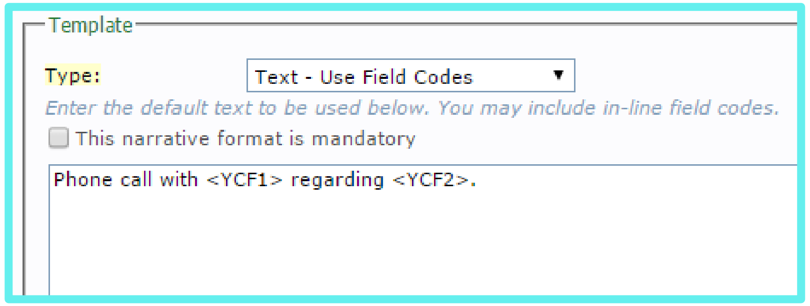
- When changing triggers, next due criteria or permissions, you will be prompted to select one of 3 options:
  - Do not update existing reports
  - Update all in-process reports (e.g., Due, Draft, etc.) – default setting
  - Update all existing reports – select when updating your due/repeating criteria and settings so all forms already in the system will convert to the new changes
- Specific setting changes will trigger this option
- Updating your custom fields on the Custom tab when in custom form builder will not update existing or in-process reports.
  - Changes will appear when users add a new activity or report.
  - Preserves your existing reports in their original format.

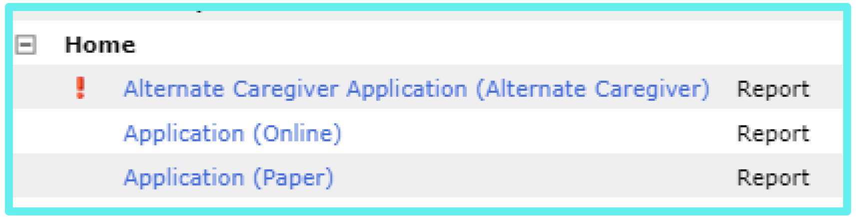


Template Types

- 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 when “Generate Narrative” button is selected.
  - This narrative format is mandatory – check this box if this format is required when workers make notes in the form.
- 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.
- The following will generate a red exclamation if no attached file:
  - File – Use Field Codes – Upload documents that use extendedReach field codes to populate the fields (Word)
  - 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)







Configurator – Word and Web Documents

- Word Documents
  - Edit Microsoft Word Documents in eR the same way you would if they were on your PC's desktop. This feature automates the download and upload process normally required by websites.
  - To edit Word Documents in extendedReach, you must install the "eR Plugin". Installing the eR Plug-In requires Microsoft Windows. If you are using a Mac/Apple computer, see Editing Word Documents on a Mac. If you are using an iPad, please see Editing Word Documents on iPad.
  - Help Center Article: https://erfostercare.helpscoutdocs.com/article/390-editing-word-documents-with-the-extendedreach-plug-in

- Web Documents
  - Web Documents remove the need for Word documents and the extendedReach plugin. They are compatible with all computer types including Macs and Chromebooks.
  - Like regular Word documents, Web Documents can be used for case and home activities and reports
  - Help Center Article: https://erfostercare.helpscoutdocs.com/article/584-creating-and-editing-web-documents

- Uses – state specific forms where format cannot be changed

- Cons –
  - Cannot set fields required;
  - Cannot lock down the format which allows Staff to edit/change

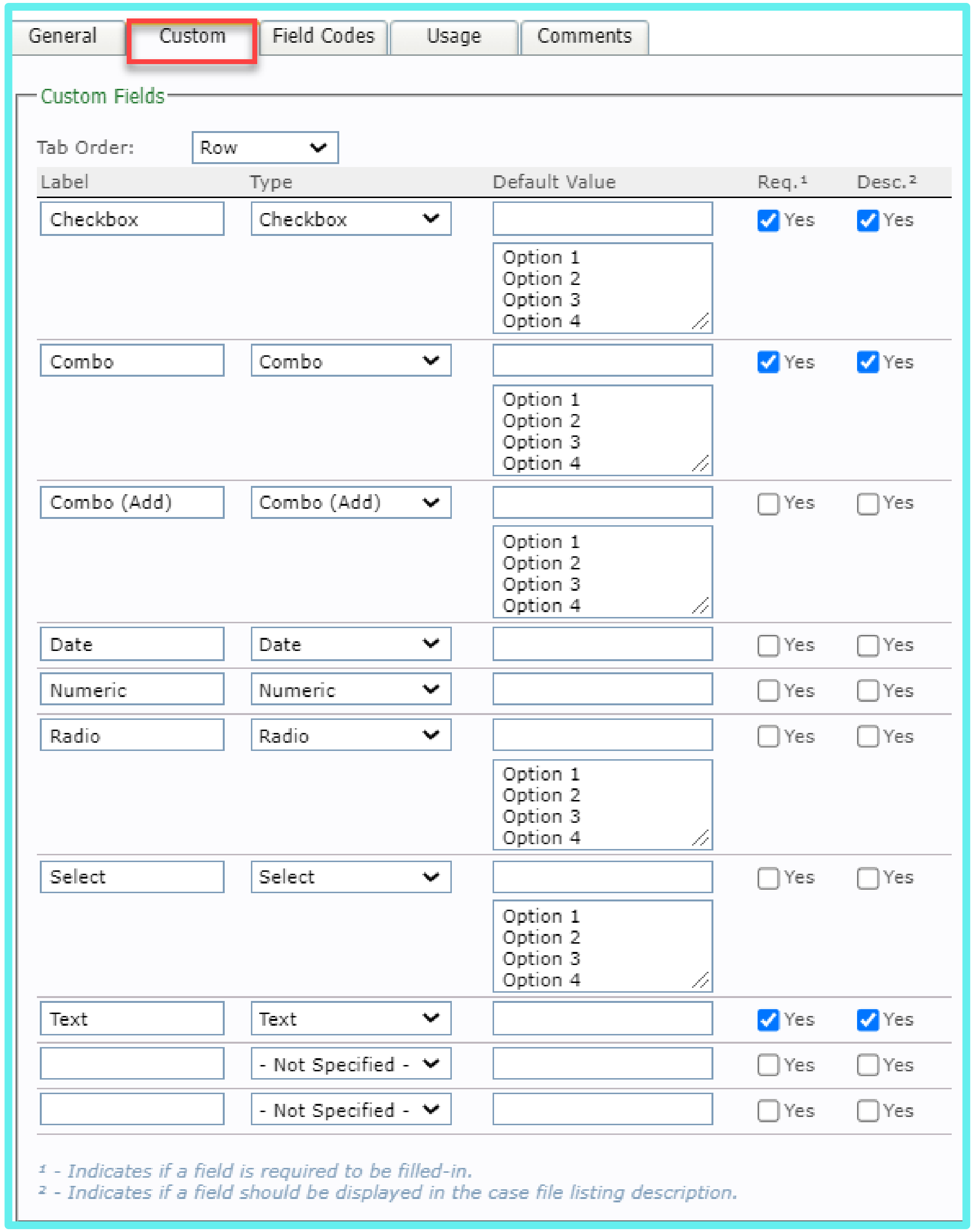
- Addressed in Forms Management Training and please access articles in Help Center for more information.

Custom Tab Options

- Add up to 10 custom fields for a simple form
  - Custom Fields allow you to collect and track additional pieces of information specific to an Activity Type or Report Type.
    - For example, when a Phone Call Activity is recorded – you may want to track the subject of that call. When a Monthly Medication Log is recorded – you may want to track the corresponding month and year.
    - Miscellaneous Uploaded Documents: add single line text field to capture the name of the form and set to display on description so it will appear in case or home file description.
- Less flexibility these fields than using the Custom Form Builder
- Or turn on the Custom Form Builder Setting for access to Custom Form Building tools

Custom Fields

- Create up to 10 custom fields for an Activity or Report.
- Configure the Custom Fields from top to bottom; one per row. Leave any unused custom fields as “Not-Specified”.
- NOTE:
  - When adding/changing/removing custom fields for an existing Activity or Report, your modification will affect ALL associated activities and reports.
  - Existing custom field values/data could be affected (modified or deleted) by your changes.
  - If making significant changes to a custom field – it may be preferable to create a new Activity or Report (clone) versus modifying the existing one.



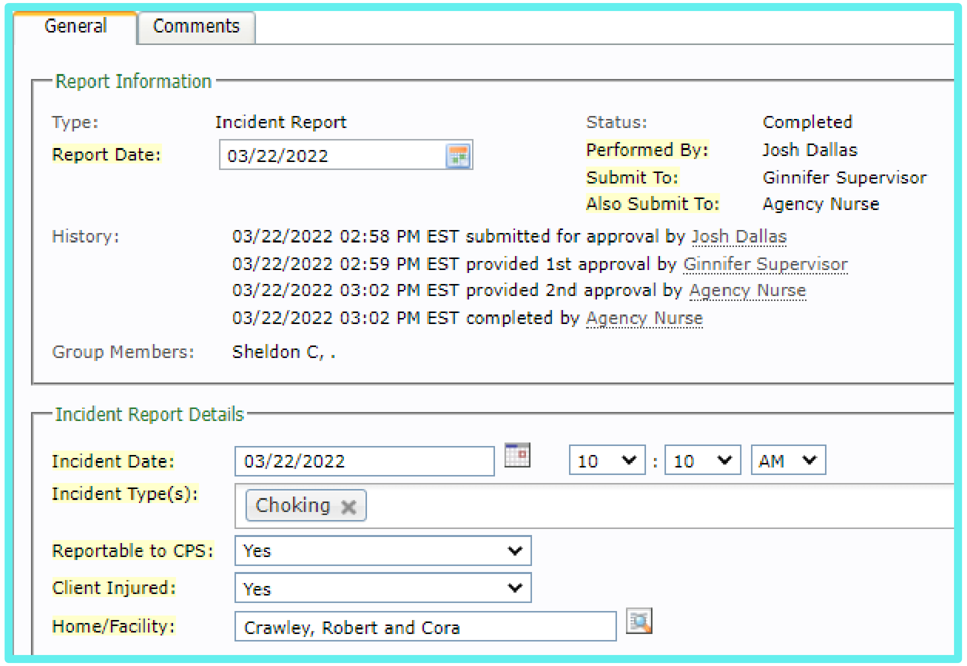
Custom Fields

- Tab Order – Determines where cursor will go next, when a user clicks "Tab" in a Custom Field.
  - Row – Fill out fields row-by-row (left-to-right; top-to-bottom).
  - Column – Fill out fields in 1st column, then 2nd column.
- Label – Name of the Custom Field.
- Type – Field type
- Default Value – Displays in field on data entry
- Req. 1 – Field is required
- Desc. 2 – Field displays in file listing description.
- Custom Subform –Advanced option for extendedReach developers and can be ignored

- Field Type Options
  - Not Specified – Custom Field not in use.
  - Checkbox – Pick one or more values from a list.
  - Combo – Pick only one value from a list.
  - Combo (Add) – Pick only one value from a list or type a value.
  - Date – Date field.
  - Numeric – Number field (cannot be currency).
  - Radio – Display all field values at the same time (like check boxes) however only one value can be selected.
  - Select – Pick multiple values from a list.
  - Text – Type in any value.

Report Information

- Used for triggering next due dates
- Shows history
- Does not appear on the printed report. Confusion with dates – often think date/next due date will appear on the report but it does not.
- Add Report date fields to custom form (date of report or date completed, next due date, etc.)



General | Comments

Report Information

Type: Incident Report
Report Date: 03/22/2022

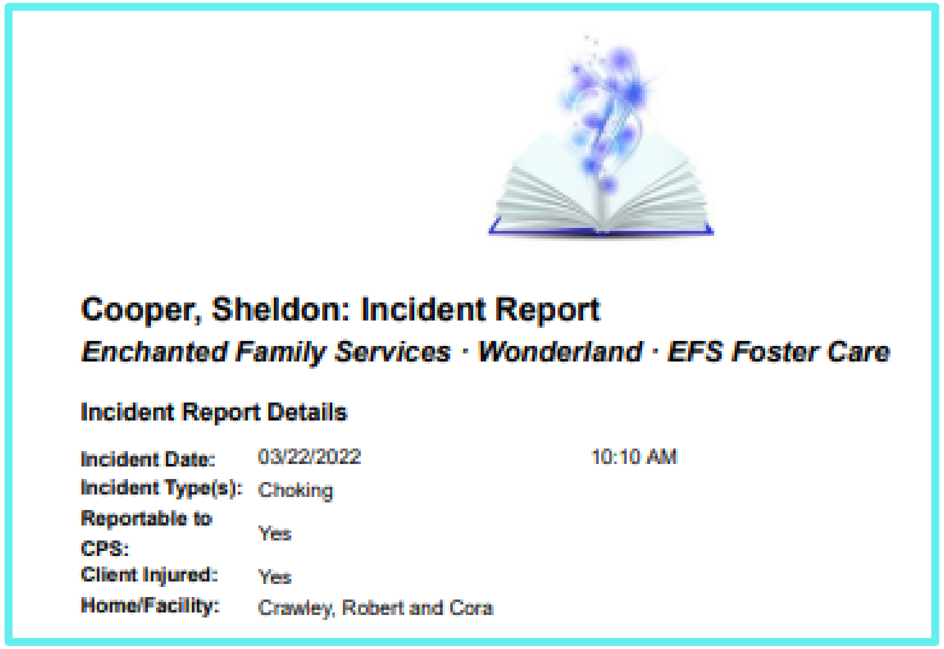
Status: Completed
Performed By: Josh Dallas
Submit To: Ginnifer Supervisor
Also Submit To: Agency Nurse

History:
03/22/2022 02:58 PM EST submitted for approval by Josh Dallas
03/22/2022 02:59 PM EST provided 1st approval by Ginnifer Supervisor
03/22/2022 03:02 PM EST provided 2nd approval by Agency Nurse
03/22/2022 03:02 PM EST completed by Agency Nurse

Group Members: Sheldon C, .

Incident Report Details

Incident Date: 03/22/2022 10 : 10 AM
Incident Type(s): Choking
Reportable to CPS: Yes
Client Injured: Yes
Home/Facility: Crawley, Robert and Cora



Cooper, Sheldon: Incident Report

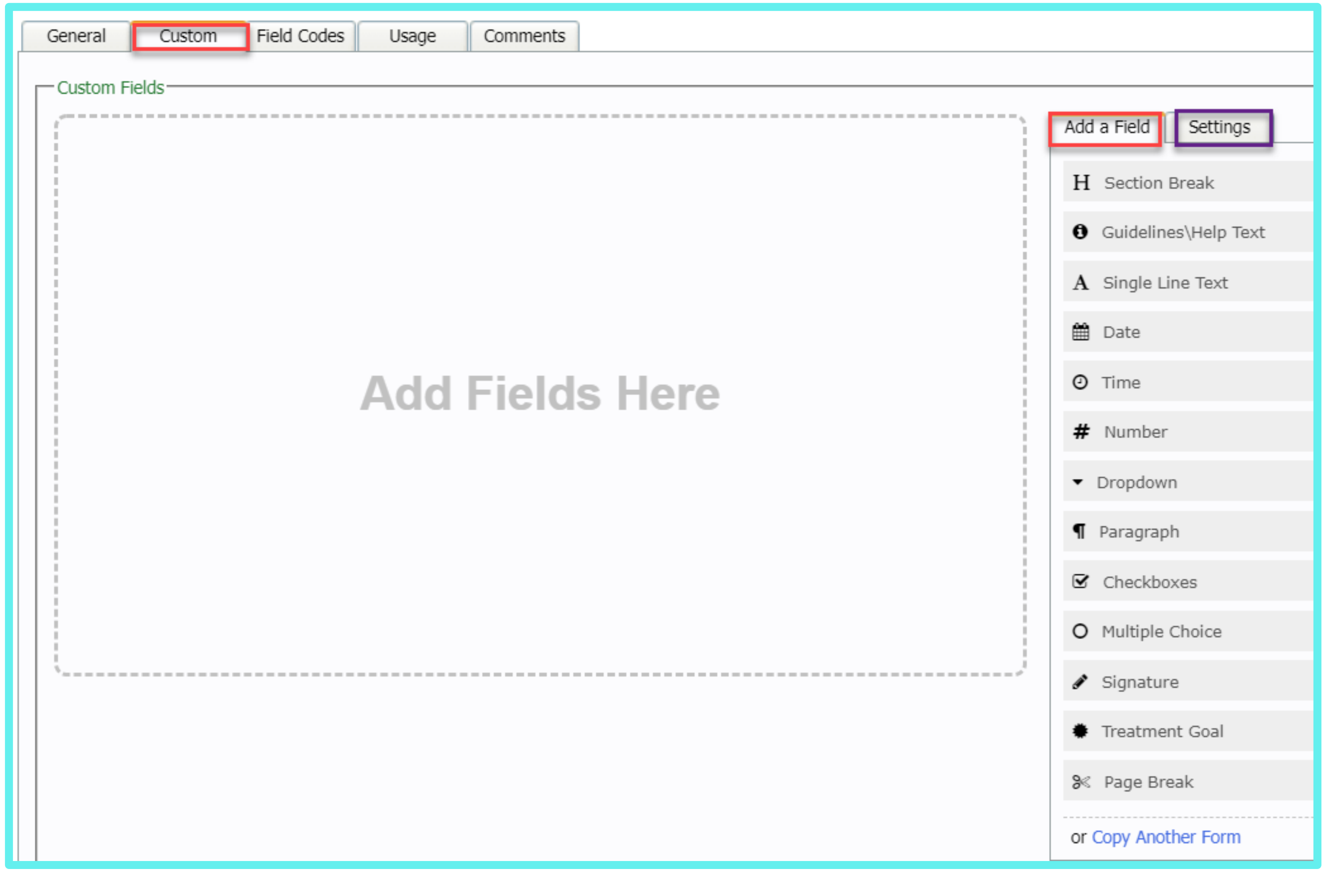
Enchanted Family Services · Wonderland · EFS Foster Care

Incident Report Details

Incident Date:	03/22/2022	10:10 AM
Incident Type(s):	Choking	
Reportable to CPS:	Yes	
Client Injured:	Yes	
Home/Facility:	Crawley, Robert and Cora	

Forms Management Training

- Focused on Creating and Editing a Custom Form with the Custom Form Builder
- Drag & Drop interface or simply click the field and it will appear at the end of field list



Support Resources

Your Agency's System Administrator

Access the User Guide

Submit a Support Ticket

Contact your Customer Success Manager

Submit an Idea

Support Resources