



extended**Reach**
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CONFIGURATOR

System Administrator Training

Agenda



Configurator Overview



Activities, Reports, Print Templates



Settings, Triggers, Next Due Dates

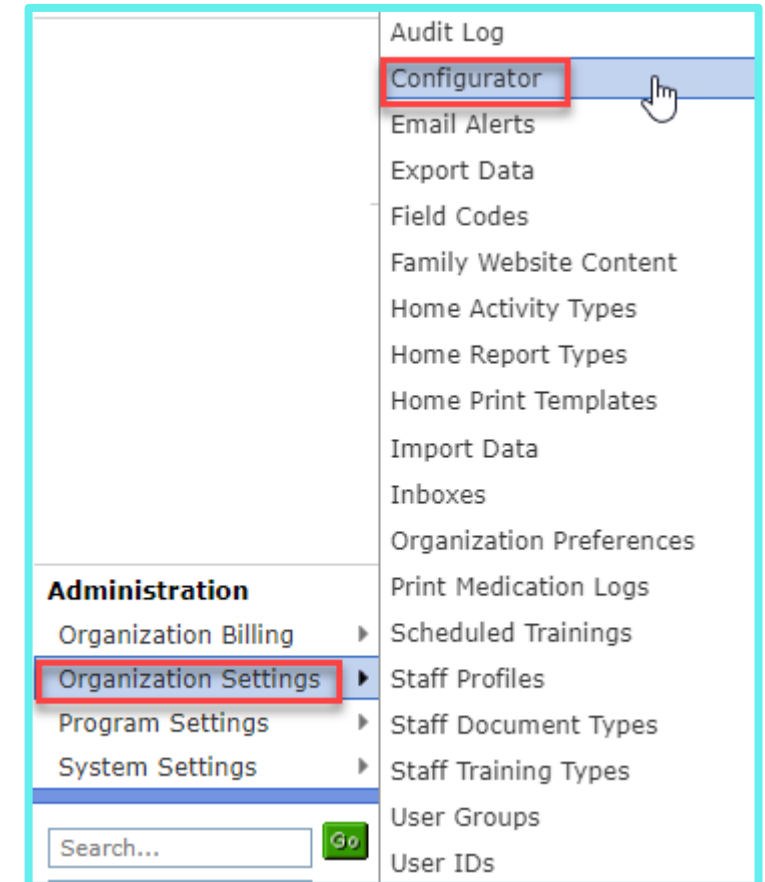


Support Resources



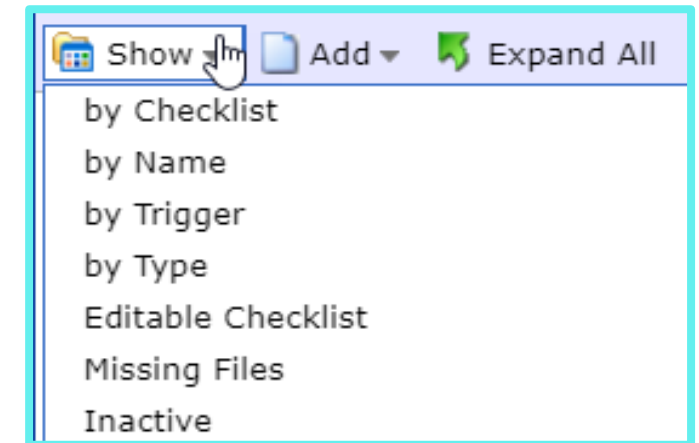
Configurator Overview

- 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

 Show ▾  Add ▾  Expand All  Excel  Help ▾

Total	Name	Optional	FFW	Type	Approval	Custom Fields	Template Type	# Field Codes	Available To	Due/Expires	Repeat Every
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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

55 ☐ EFS Foster Care

14 ☐ Admission Intake Documents

Birth Certificate

Admission Intake Documents CF Sample for Training (Do Not Edit) ☐ Yes ☐ Yes ☒ Yes Foster Admission

☐ None ☐ None

☐ Due Daily ☒ 90 after Due Date

☒ Due 30 days after Foster Admission

☐ Expires after days

☐ Expires on user-specified date

Case Report Type

☐ Inactive

Add – Types

- **Activity Types**

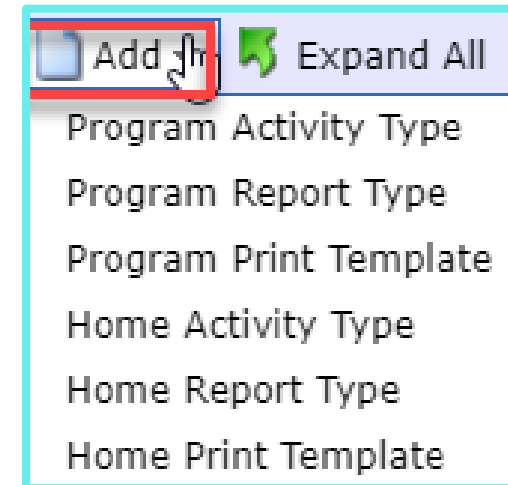
- Events that occur at a certain point in time and need to be documented.
- Usually have an associated case note or narrative and may also have associated file attachments.
 - Examples – Medicals, social work contacts, home visits, phone calls, letters, or email.

- **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

Create Trigger(s):

Foster Admission
- None -
Foster Admission
Foster Discharge
Adoption Admission
Adoption Discharge
Adoptive Placement
Adoption Finalization
Placement
Placement (Subsequent Only)
Placement (Initial Only)
Placement (To Respite Only)
Placement (From Respite Only)
Activity Completion...
Report Completion...

Create Trigger(s): Foster Admission

Available To: ☒ Restrict to Certain Program Categories

Program Categories: ☐ Traditional Foster Care ☐ Therapeutic Foster Care

☐ Also trigger on Program Category change

☒ Due based on Event

30 days after Foster Admission Date

☒ Then every 365 days after previous Activity Date

☐ Expires after years

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

Create Trigger(s): New License

Available To: ☒ Households ☒ Specify Provider Type(s)

Household Types: ☐ Foster Home ☐ Applicant ☐ Inquiry ☒ Community Foster Home

License Types: ☐ Enrolled ☐ Provisional - New Home ☐ Regular

Options: ☐ Due ☐ Expires ☐ Filter set ☐ Daily

based on Event
based on Event
based on Formula
Daily
Weekly
Monthly
Custom (Quarterly/Bi-Monthly/etc.)

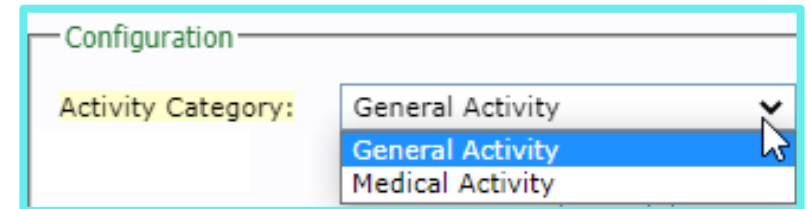
Options: ☐ Due ☐ based on Event

☒ Expires after years

years
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

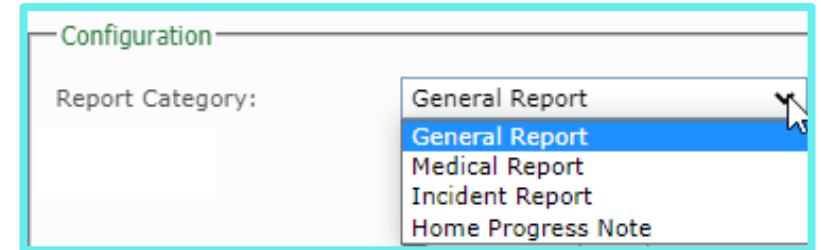


Configuration

Activity Category:

- General Activity
- General Activity
- Medical Activity

This screenshot shows a configuration window titled 'Configuration'. It contains a dropdown menu labeled 'Activity Category:'. The menu is open, showing three options: 'General Activity' (selected and highlighted in blue), 'General Activity', and 'Medical Activity'. A mouse cursor is visible at the top right of the dropdown menu.

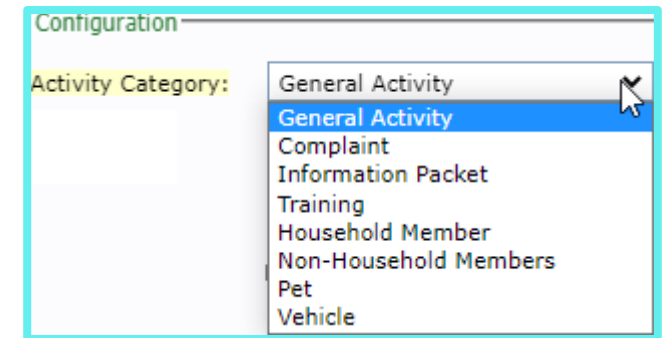


Configuration

Report Category:

- General Report
- General Report
- Medical Report
- Incident Report
- Home Progress Note

This screenshot shows a configuration window titled 'Configuration'. It contains a dropdown menu labeled 'Report Category:'. The menu is open, showing five options: 'General Report' (selected and highlighted in blue), 'General Report', 'Medical Report', 'Incident Report', and 'Home Progress Note'. A mouse cursor is visible at the top right of the dropdown menu.

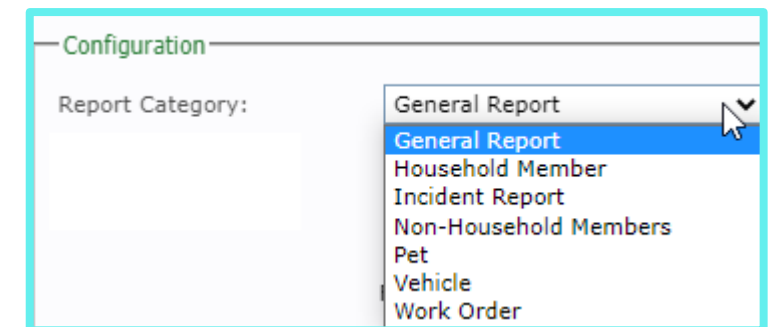


Configuration

Activity Category:

- General Activity
- General Activity
- Complaint
- Information Packet
- Training
- Household Member
- Non-Household Members
- Pet
- Vehicle

This screenshot shows a configuration window titled 'Configuration'. It contains a dropdown menu labeled 'Activity Category:'. The menu is open, showing nine options: 'General Activity' (selected and highlighted in blue), 'General Activity', 'Complaint', 'Information Packet', 'Training', 'Household Member', 'Non-Household Members', 'Pet', and 'Vehicle'. A mouse cursor is visible at the top right of the dropdown menu.



Configuration

Report Category:

- General Report
- General Report
- Household Member
- Incident Report
- Non-Household Members
- Pet
- Vehicle
- Work Order

This screenshot shows a configuration window titled 'Configuration'. It contains a dropdown menu labeled 'Report Category:'. The menu is open, showing eight options: 'General Report' (selected and highlighted in blue), 'General Report', 'Household Member', 'Incident Report', 'Non-Household Members', 'Pet', 'Vehicle', and 'Work Order'. A mouse cursor is visible at the top right of the dropdown menu.

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

The screenshot shows a web form titled "Report Type Information" and "Configuration". The "Report Type Information" section includes fields for "Report Name" (CFB Sample for Training (Do Not)), "Menu Order" (1), "Program" (EFS Foster Care), "Create Trigger(s)" (Foster Admission), and "Available To" (Restrict to Certain Program Categories). The "Configuration" section includes "Report Category" (General Report), "Options" (Due based on Event, 30 days after Foster Admission Date, Then every 90 days after previous Due Date), "Filter settings" (enter search term), and a list of checkboxes for various report options. The "Show Advanced Options" link is highlighted with a red box. The "Restrict To" section is also highlighted with a red box, showing "Enchanted Family Services" selected. The "Checklist Category" is set to "CFB Training Sample Forms". The "Template" section shows "Type" as "Text - Use Field Codes".

Report Type Information

Report Name: CFB Sample for Training (Do Not) Menu Order: 1
Program: EFS Foster Care ☐ Inactive
Create Trigger(s): Foster Admission
Available To: ☐ Restrict to Certain Program Categories

Configuration

Report Category: General Report
Options: ☒ Due based on Event
30 days after Foster Admission Date date
☒ Then every 90 days after previous Due Date
☐ Expires after years
Filter settings: enter search term
☒ Stop repeating if foster care case closed
☒ Delete if due after close date and foster case closed
☐ Delete if due after close date and adoption case closed
☐ Use months instead of days for due date units
☒ Include in Case Note Summary
☒ Does not require approval
☐ Prompt to copy to siblings
☐ Group Report (Allow Copy to Other Cases)
☒ Show in Compliance Checklist
☐ Copy this report if case is readmitted
☐ Associate with a foster home and show in home file
☐ Share completed file attachments on the family website
☐ Share completed custom form on the family website
☐ Add reminder to family website calendar
☒ Use Custom Form Builder
☐ Allow Custom Form to be hidden to attach hard copy instead
☐ Show guidelines/help text
☐ Show as Profile Photo (must be template type Photo below)
[Show Advanced Options](#)

Restrict To: ☒ Enchanted Family Services
Checklist Category: CFB Training Sample Forms ☐ Optional

Template

Type: Text - Use Field Codes

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.

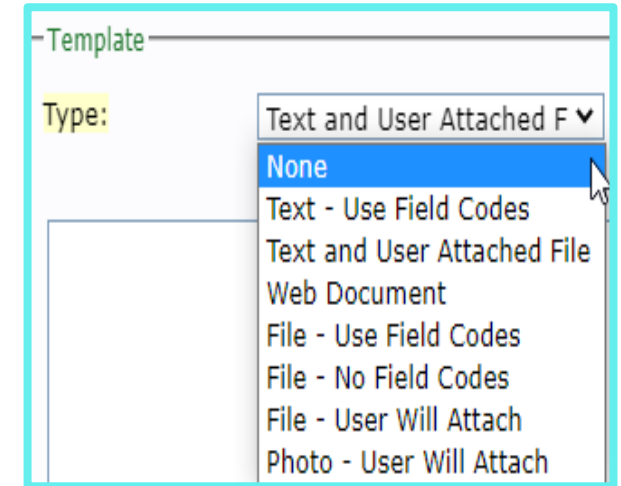
You have made changes to this report's option(s):

Added Option(s): PROMPTDELETE, NOAPPROVAL

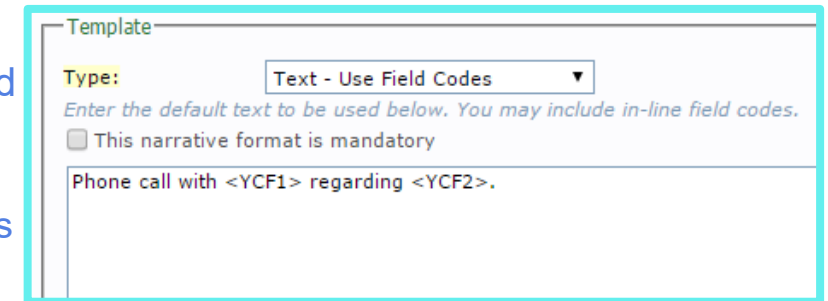
- ☐ Do not update existing reports
- ☐ Update all in-process reports (e.g. Due, Draft, etc.)
- ☒ Update all existing reports

Template Types

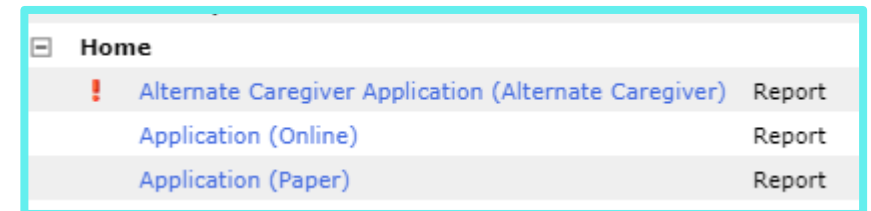
- None
- Text – Use Field Codes – Enter text into a narrative box using field codes. Once completed, the narrative box will display the field code information when “Generate Narrative” button is selected.
 - This narrative format is mandatory – check this box if this format is required when workers make 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)



A screenshot of a web form titled "Template". It features a "Type:" label followed by a dropdown menu. The dropdown is open, showing a list of options: "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.



A screenshot of the "Template" form with "Text - Use Field Codes" selected in the dropdown. Below the dropdown, there is a text input area with the placeholder text "Enter the default text to be used below. You may include in-line field codes." and a checkbox labeled "This narrative format is mandatory". The text input area contains the text "Phone call with <YCF1> regarding <YCF2>.".



A screenshot of a web page titled "Home". It displays a table with three rows of data. The first row has a red exclamation mark icon, the text "Alternate Caregiver Application (Alternate Caregiver)", and the word "Report". The second row has the text "Application (Online)" and the word "Report". The third row has the text "Application (Paper)" and the word "Report".

!	Alternate Caregiver Application (Alternate Caregiver)	Report
	Application (Online)	Report
	Application (Paper)	Report

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-plugin>
- 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.

General Custom Field Codes Usage Comments

Custom Fields

Tab Order: Row ▼

Label	Type	Default Value	Req. ¹	Desc. ²
Checkbox	Checkbox ▼	Option 1 Option 2 Option 3 Option 4	☒ Yes	☒ Yes
Combo	Combo ▼	Option 1 Option 2 Option 3 Option 4	☒ Yes	☒ Yes
Combo (Add)	Combo (Add) ▼	Option 1 Option 2 Option 3 Option 4	☐ Yes	☐ Yes
Date	Date ▼		☐ Yes	☐ Yes
Numeric	Numeric ▼		☐ Yes	☐ Yes
Radio	Radio ▼	Option 1 Option 2 Option 3 Option 4	☐ Yes	☐ Yes
Select	Select ▼	Option 1 Option 2 Option 3 Option 4	☐ Yes	☐ Yes
Text	Text ▼		☒ Yes	☒ Yes
	- Not Specified - ▼		☐ Yes	☐ Yes
	- Not Specified - ▼		☐ Yes	☐ Yes

¹ - Indicates if a field is required to be filled-in.
² - Indicates if a field should be displayed in the case file listing description.

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	Status:	Completed
Report Date:	03/22/2022	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

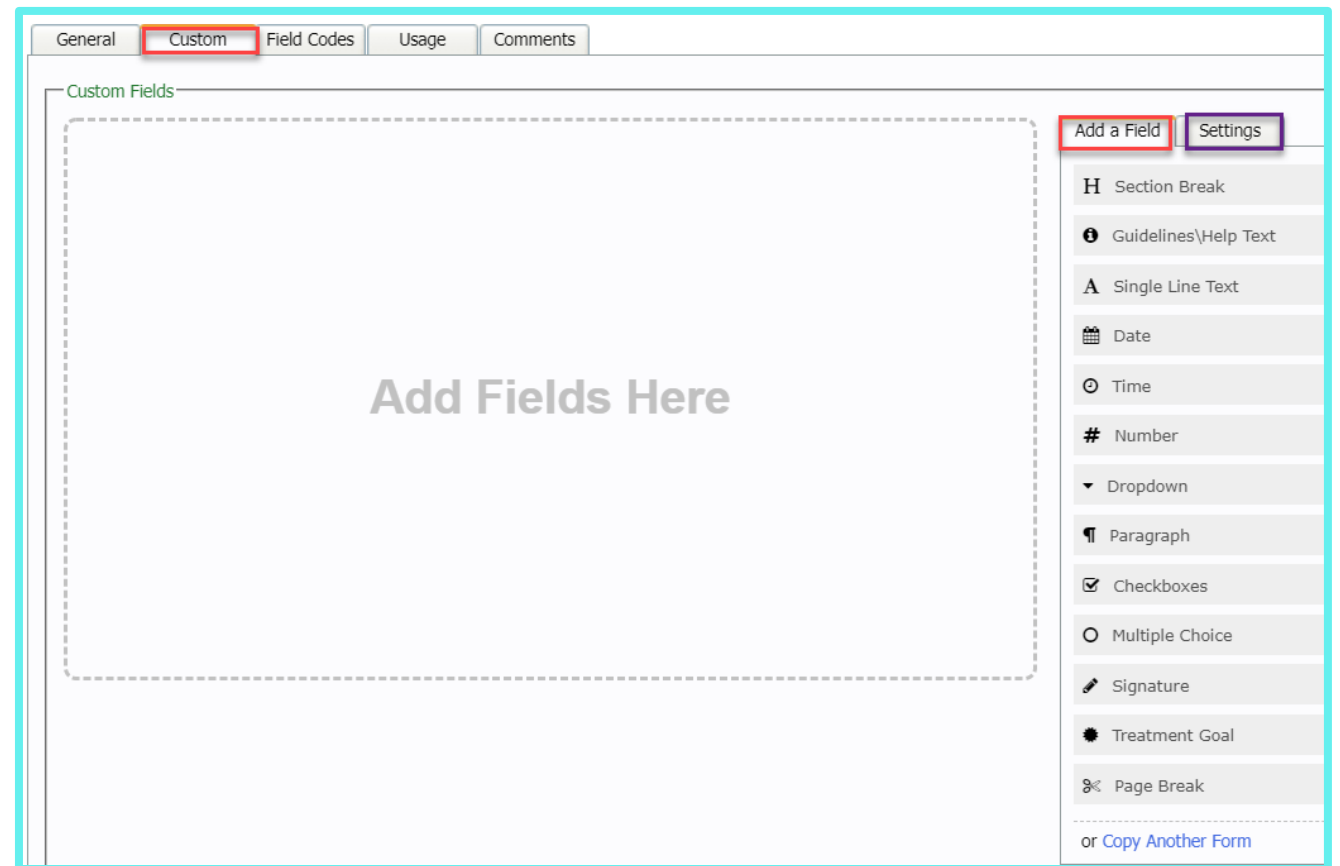
Enchanted Family Services · Wonderland · EFS Foster Care

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



The screenshot displays the 'Custom Form Builder' 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 button icon), 'Signature' (pen icon), 'Treatment Goal' (target icon), and 'Page Break' (page break icon). At the bottom right, there is a link that says 'or Copy Another Form'.

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

