

extendedReach
POWERED BY k·care

Forms Management

PART 2





Participants will be muted by default



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



Session will be recorded and available in the User Guide

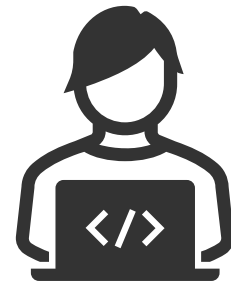


A link to request a training certificate is provided at the end of the evaluation

Today's Agenda



Deciding
what to
build



Form
Template
Types +
Field Codes



Live Form
Building



Support
tips



Q & A

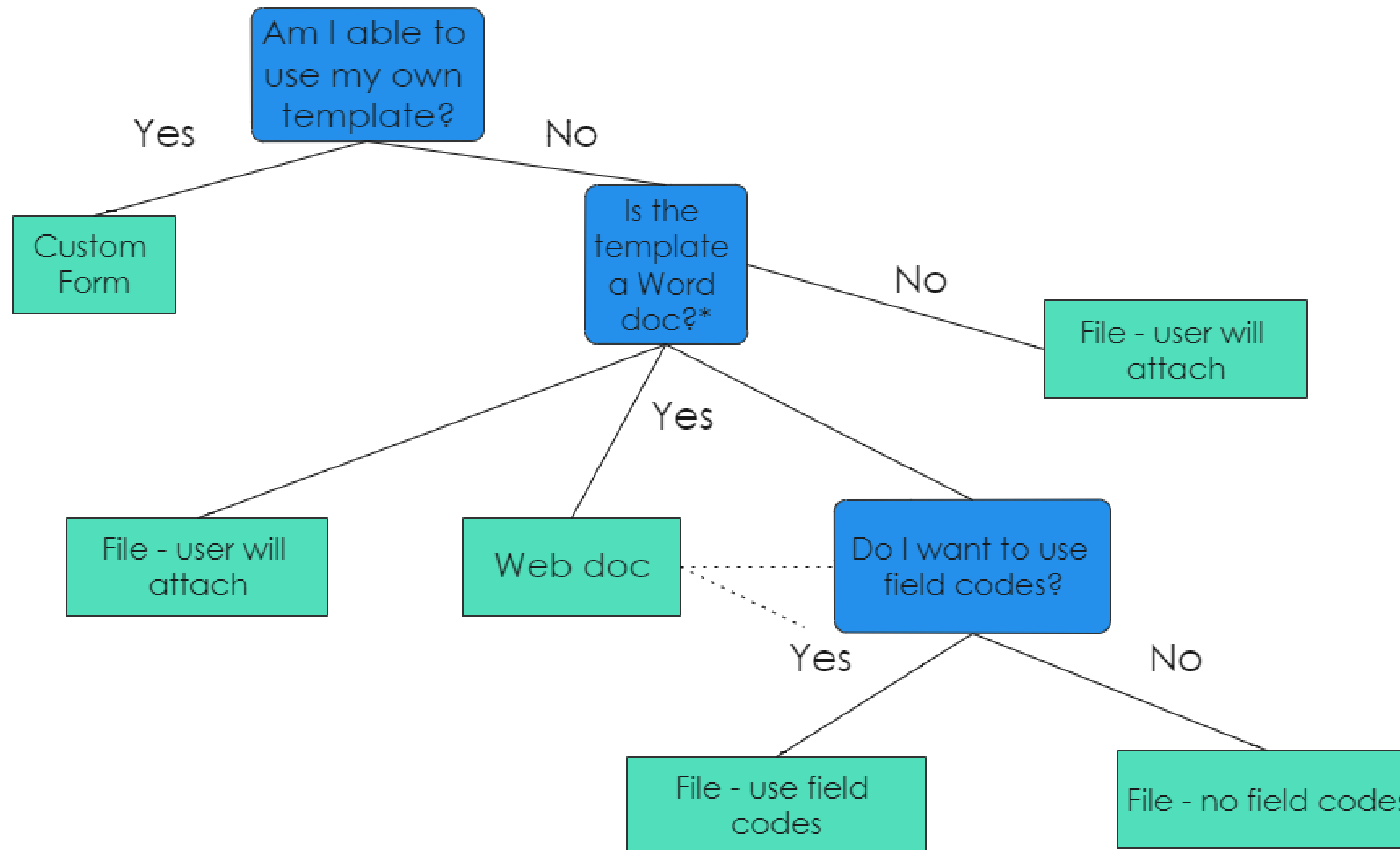
FORM TEMPLATE TYPES

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

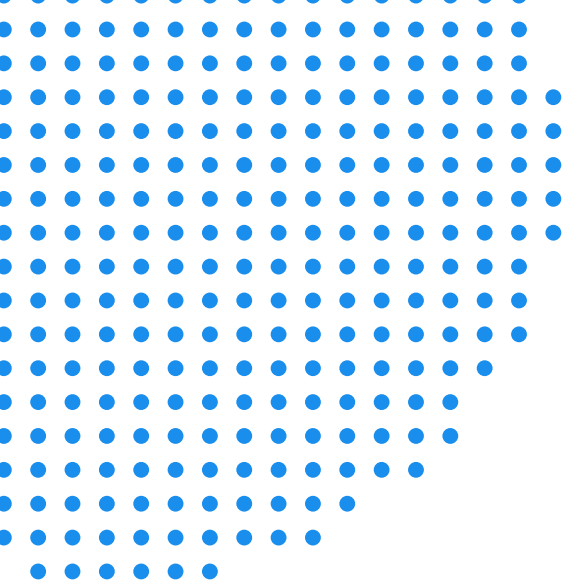
Software installed on your computer that will allow you to edit word documents directly on the extendedReach website.

WHAT SHOULD I BUILD?



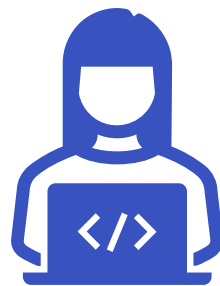
Let's dive in!





Accessing Support

Support Resources



Your agency's
System
Administrator



Access the
User Guide



Contact your
CSM or
Support
(SAs only)





Thank You

eR.