EMTrack™ Quick Reference Guide

Create and Design Forms

Overview

Client forms are used to collect data and create records in EMTrack. There are several standard forms, such as *MCI Triage*, *Add Evacuee*, *Add Daily Patient*, and *Vaccination*, which are pre-configured and ready to use.

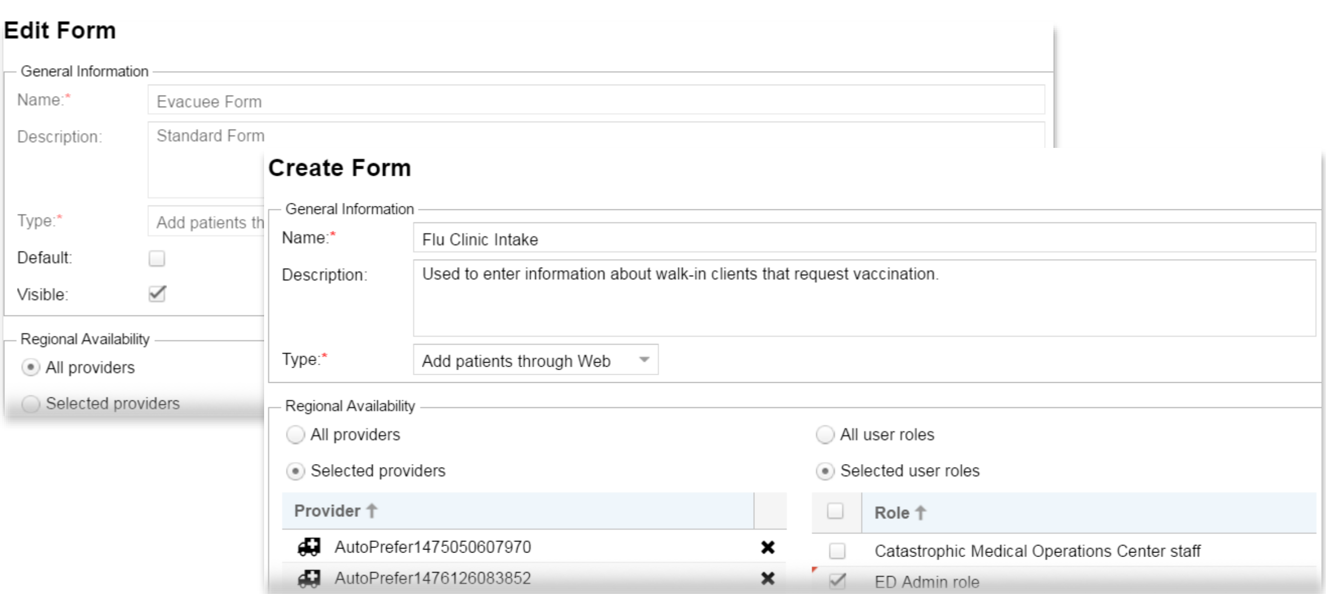
Regional Administrators manage forms on the *Forms Configuration* page, which provides an overview of form details and offers access to copy, create, design, and otherwise, work with forms.

Forms can be copied and used as templates to create new forms. Copied forms contain all the same fields as the original form. It is also possible to create completely new forms, which are empty. When creating a form you can specify if the form is available for all users in the region or only specific providers and user roles.

Either way, after copying or creating, forms are then configured through the design process. Configuring forms includes adding and/or removing instructions, sections, and fields, changing the order of form elements, and specifying whether fields are shown, required, labeled, and/or include tooltips.

While configuring forms, it is important to remember that some fields are formatted using configurable lists. These lists are generated from the associated data element. When using these fields, remember to verify that the data elements are populated correctly.

Finally, as part of the design process, forms are published to make them **Active**. **Active** forms are then made **Visible** when you want users to have access to them on the *Patients* page or through the mobile application.



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Manage Forms

Regional Administrators access client forms through **Preferences**, by clicking **Client Forms Configuration** on the left. The *Forms Configuration* page lists all standard and custom forms, alphabetically by default, with information including:

- **Name** – Title of the form.
- **Type** – Intended platform and/or purpose of the form.
- **Daily Tracking** – Forms that automatically generate and assign tracking numbers. In general, daily tracking is used with the mobile application in situations where tags or wristbands are not available.
- **Active** – Forms that have been published and are ready for use.
- **Changes** – Changes to published forms are marked *Pending* when they have been saved, but not yet published. Pending changes are not visible to the user.
- **Visible** – Forms that can be seen and selected by users on the *Patient* tab or mobile application.

Note: Forms must be **Active** before they can be made **Visible**. User access to forms is also determined when creating or editing a form by specifying form availability for providers and user roles.

- **Default** – Form that opens automatically when users access the *Patient* tab.
- **Owner** – Creator or originator of the form. Ownership determines whether forms can be edited and/or designed. All forms can be copied.
- **Actions** – Menu that allows you to **View**, **Edit**, **Design**, **Copy**, or **Delete** the form.

Forms Configuration

Create Form | Search:

Name ↑	Type ↑	Daily Track...	Active	Changes	Visible	Default	Owner	Actions
Edit Patient Record	Web - Edit	No	Yes	-	Yes	-	Springfie...	View
Add Daily Patient	Mobile	Yes	Yes	Pending	No	-	Springfie...	View
Clinic Intake	Web - Add	No	Yes	-	No	No	Intermedix	View
Evacuee Form	Web - Add	No	Yes	-	No	No	Intermedix	View
MCI Triage	Web - Add	No	Yes	-	Yes	Yes	Springfie...	View
Vaccination Form	Web - Add	No	Yes	-	No	No	Intermedix	View

Create Form | Sort Web Forms | Sort Mobile Forms

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To manage forms

Take one or more of these actions.

If you want to…	Then…
Create a form,	Click **Create Form** and follow the steps in the procedure Create a Form.
Reorder forms in the table,	1. Click a column header once to reorder forms in ascending alphabetic order based on the contents of that column. 2. Click the column header again to reorder forms in descending alphabetic order based on the contents of that column.
Make a form available to users on the Patients page or mobile app, **Note**: To make a form visible, it must be published (see Design and Publish a Form).	1. Locate the form and on that row, click the arrow to open the **Actions** menu and click **Edit**. The *Edit Form* page opens. 2. In the *General Information* section, select the **Visible** check box. 3. At the bottom of the page, click **Save**.
Select which *Web - Add* form is marked **Default**, and as a result, opens automatically when users access the *Patients* page or mobile app, **Note**: To make a form the default, it must be published (see Design and Publish a Form) and visible.	1. Locate the form and on that row, click the arrow to open the **Actions** menu and click **Edit**. The *Edit Form* page opens. 2. In the *General Information* section, select the **Default** check box. 3. At the bottom of the page, click **Save**.
Specify the order in which forms appear in the Select Form list on the Patients page,	1. Click **Sort Web Forms**. The *Sort Web Forms* window opens. 2. Take one or more of these actions. a. If you want forms listed alphabetically, select the check box for **Sort alphabetically**. b. If you want forms listed in a specific order, click the name of a form and use the arrows on the right to move it up or down in the list. 3. Click **Save**.
Specify the order forms appear in the list on the mobile app,	1. Click **Sort Mobile Forms**. The *Sort Mobile Forms* window opens. 2. Take one or more of these actions. a. If you want forms listed alphabetically, select the check box for **Sort alphabetically**. b. If you want forms listed in a specific order, click the name of a form and use the arrows on the right to move it up or down in the list. 3. Click **Save**.

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If you want to…	Then…
View, edit, design, copy, or delete a form,	1. Locate the form and on that row, click the arrow to open the **Actions** menu and click the action. 2. Follow the steps for that procedure.

Create and Design Forms

Forms are quickly added by copying existing forms or creating new forms. Copying and creating forms only requires basic information, such as the form name and description. By default, new forms are available to everyone in a region; however, you can limit availability to specific providers and user roles.

Copying forms has the advantage of populating the new form with all fields and field configurations from the original form. As a result, copied forms are usually easier to configure in design because often only a few items need to be reconfigured to complete the new form.

Newly created forms are empty and consequently, require a little more effort to configure during design. Regardless of how the form is generated, the design process allows you to customize forms to meet the needs of your entire region, as well as those of specific providers and user roles.

To copy a form

1. Click **Preferences**. The *Preferences* page opens.
2. In the list on the left, click **Configuration**. The *Forms Configuration* page opens.
3. Locate the form and on that row, click the arrow to open the **Actions** menu and click
4. **Copy**. The *Copy Form* page opens.
    a. In the *General Information* section, accept or change this information:
    b. **Name** - Title by which users locate and refer to the form.
    c. **Description** - Information that helps users understand when to use the form.
    d. **Copy to Region** - According to access rights, allows you to identify the region for which the form will be available.
5. Click **Save**. The *Forms Configuration* page opens and your new form appears in the list.

To create a form

1. Click **Preferences**. The *Preferences* page opens.
2. In the list on the left, click **Configuration**. The *Forms Configuration* page opens.
3. Click **Create Form**. The *Create Form* page opens.
4. In the *General Information* section, enter the:
    a. **Name** - Title by which users locate and refer to the form.
    b. **Description** - Information that helps users understand when to use the form.
    c. **Type** - Indication of where and how the form is intended to be used.

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5. In the *Regional Availability* section, specify which providers will have access to the form.

If you want the form available for…	Then…
All providers in the region,	Verify that **Form available for all providers in the region** is selected,
Selected providers in the region,	a. Click **Form available for selected providers in the region**, b. Click **Add Providers**. The *Add Providers* window opens with provider labels on the left and providers on the right. c. If necessary, on the left, select label check boxes and click **Search** to filter the list of providers. d. Select the check box for providers you want to include. e. Click **Confirm**.

6. In the *Regional Availability* section, specify which user roles will have access to the form.

If you want the form available for…	Then…
All user roles in the region,	Verify that **Form available for all user roles in the region** is selected,
Selected user roles in the region,	a. Click **Form available for selected user roles**, b. In the list, select the check box for user roles you want to include.

7. Click **Save**. The *Forms Configuration* page opens and your new form appears in the list.

To design and publish a form

1. Click **Preferences**. The *Preferences* page opens.
2. In the list on the left, click **Configuration**. The *Forms Configuration* page opens.

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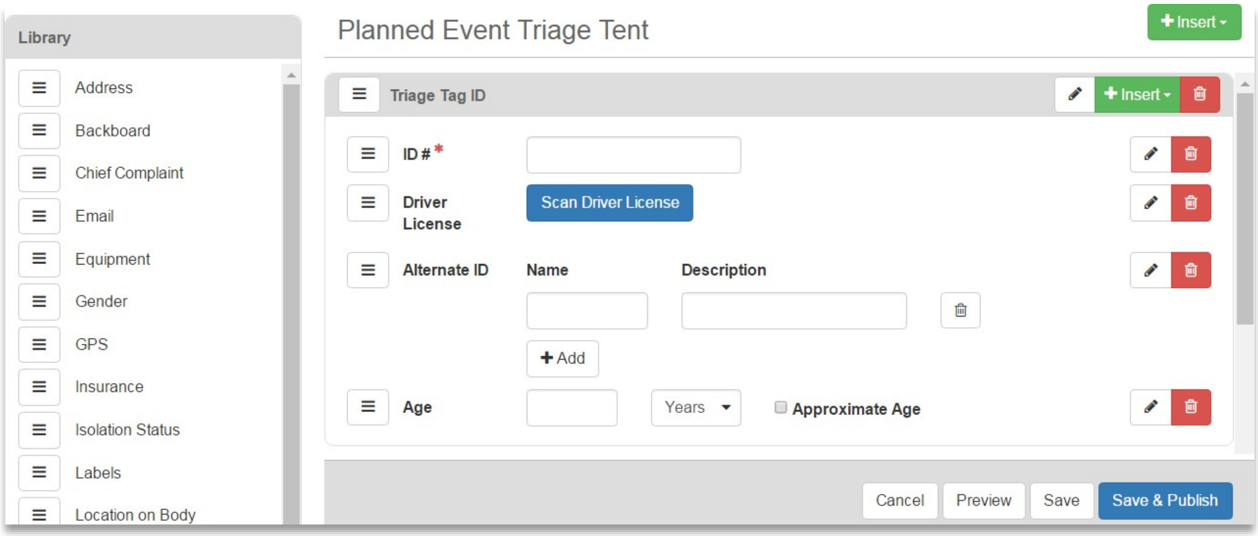
3. Locate the form and on that row, click the arrow to open the **Actions** menu and click **Design**. The form opens.



4. Take any of these actions.

If you want to…	Then…
Add a section (sections are containers that group fields),	a. On the upper right, click Insert and in the menu, click **Group**. The *Group* window opens. b. For **Label**, enter a name or description that you want to appear as the heading of this section. c. Click **Save**.
Add instructions,	a. On the upper right, click **Insert** and in the menu, click Instructions. The *Instructions* window opens. b. In the text editor, enter the instructions you want to appear in this section. c. Click **Save**.
Add a field,	a. In the *Library*, locate the field you want to add. b. On the left, click the order icon and drag it to a section of the form.
Move a field or section,	a. On the form, locate the field or section you want to move. b. On the left, click the order icon and drag it to another position.

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If you want to…	Then…
Configure a field,	a. On the form, locate the field you want to configure. b. On the right, click the edit icon. The *Element* window opens with one or more configuration options (depending on the field). Common options include: • **Required** - Indicates that a value must be entered before the form can be saved • **Show** - Identifies whether the field appears on the form • **Label** - Specifies the name used to reference the field • **Tooltip** - Adds an icon next to the label, which provides information about the field when the cursor is pointed at it
Remove a field or section,	a. On the form, locate the field or section you want to delete. b. On the right, click the delete icon. A message opens asking you to confirm removal of the field. c. Click **OK**.

5. If you want to see how the form will appear to users, click **Preview**. The form opens.
6. To verify field requirements, enter information and click **Validate**. A message appears at the top of the form if there are any errors.
7. When ready, click **Close Preview**.
8. When you are done designing the form, click **Save** or **Save & Publish**. All forms appear in the *Forms Configuration* list. Published forms are marked **Active**, and **Active** forms can be made **Visible** to users.

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