

Getting Started Guide

tConsult Forms Designer

GSG-101
Revision B

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Purpose

This document describes how to use the Forms Designer in AFHCAN's tConsult Web Software. The Forms Designer consists of two parts: the Forms Manager and the Form Editor.

Audience

This document is written for tConsult users who have been assigned the role of **ADMIN** (administrator). A tConsult administrator is responsible for administrative actions affecting a tConsult server (such as setting up user accounts, adding site names, and forwarding unresolved cases). The Forms Designer is available only to administrators.

Note: Other user roles within the tConsult software are **REAL_USER**, **TEST_USER**, and **CONSULTANT**.

Scope

This document is based on the Forms Designer in the tConsult Web application, Version 5.0. The features of the Forms Designer and their appropriate use are described.

Introduction

Forms are an important part of an AFHCAN Case.¹ They are used for recording such things as assessment data, patient history, and so on. The AFHCAN tConsult software includes a number of built-in forms that have been designed around the needs of clinical users. In addition to these standard forms, organizations can create their own forms by using the forms designer. Administrators can design, edit, and publish forms that are tailored to the evolving needs of the organization. Once published, all users working under a given server can select the form, complete it, and incorporate it into a case.

The Forms Library and Its Contents

The AFHCAN system includes a forms library. The forms library lists the various forms users can add to a case. The forms library can also be used to house selected PDF documents as a shared resource. Items in the forms library can be stored at the top level of the library, or they can be stored in folders that allow items to be organized into logical groupings.

The table below lists the types of items that can be included in the forms library.

Table 1

Types of forms and documents that can be stored in the forms library

Item	Description
standard forms	Standard forms are forms designed by AFHCAN software developers that are integrated into the software. These are included with each build of the software, and cannot be edited. They are listed in the forms library under the AFHCAN folder.
user-designed forms	User-designed forms are forms created by ADMIN users using the Forms Designer. These forms are added to the forms library. There is an option for sharing these forms with other organizations. These forms can be edited or deleted.
forms library PDFs	Forms library PDFs are additional PDF documents that have been incorporated into the forms library via the Forms Designer. These may include such things as patient handouts, provider instructions, printable pen-and-ink forms, etc. They can be deleted.

¹ An AFHCAN case is a collection of medical information gathered from a patient in relation to an episode of patient care. Information may include photographs, images, data, recordings, forms, and video clips (depending on available devices). The case is then sent via a network from one provider to another for a consult. An AFHCAN case is normally created using an AFHCAN Cart with attached peripheral devices, but cases can also be created using tConsult Web.

Administrator Actions

An administrator can perform the following actions with regard to forms:

- create forms
- edit forms
- publish forms
- delete forms
- create folders for forms
- delete folders for forms
- reset a user's e-signature password (refer to GSG-103, *Getting Started Guide, Electronic Signatures*)

Using the Forms Manager

Opening the Forms Manager Window

In the administrator's area of the screen, click on Forms Manager (Figure 1). This opens the Forms Manager in a new window (Figure 2).

Note: Only users with the ADMIN role have access to the Administrator's area.

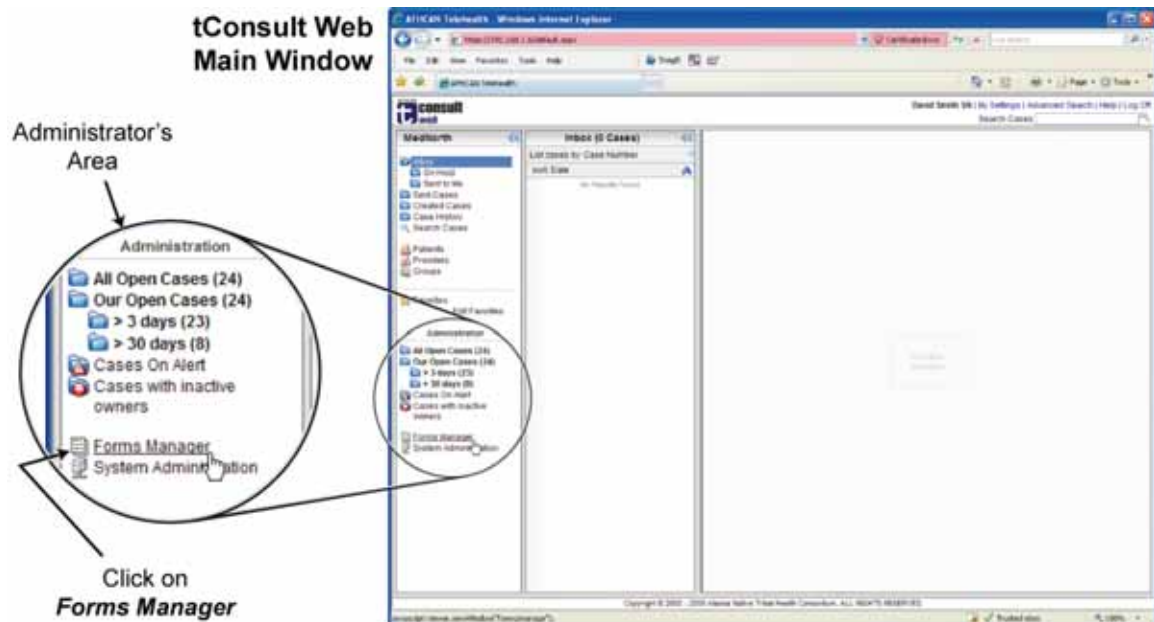


Figure 1

Opening the Forms Designer from tConsult Web

Forms Manager Window Layout

The Forms Manager window shows the contents of the forms library for the organization, which includes user-designed forms and forms library PDFs. The Forms Manager allows the administrator to view and change the folder structure for the forms library, and to add, edit, and delete forms and forms library PDFs.

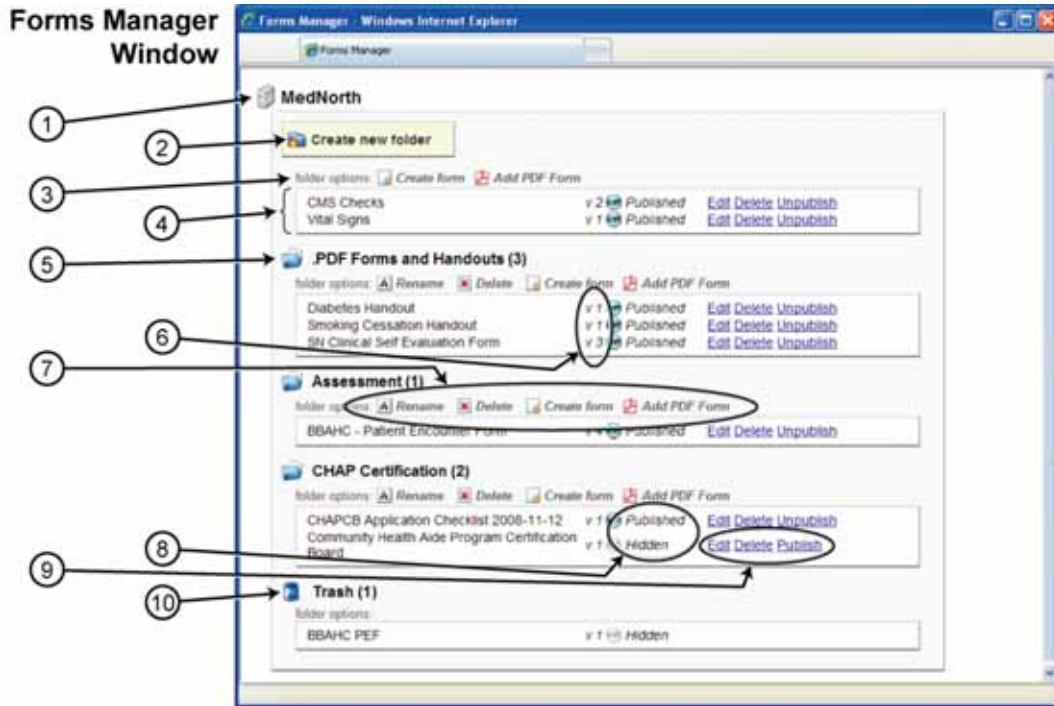


Figure 2
Forms Manager window

The table below describes the items called out in Figure 2.

Table 2
Explanation of items in Figure 2, Forms Manager Window

Callout	Item	Description
1	organization	The Forms Manager window displays an organization’s forms library. Only the organization’s user-designed forms and forms library PDFs are displayed. Standard AFHCAN forms are not displayed in the Forms Manager window because they cannot be edited or deleted by the administrator. Standard AFHCAN forms appear on the forms library list only when forms are added to a case.
2	Create new folder	The administrator can create folders in the organization’s forms library. (Strategies for naming folders are discussed below.)

Callout	Item	Description
3	folder options	The top level of the forms library has only two actions that can be taken: Create form and Add PDF Form . (See item 7 below.)
4	list of forms	All forms and PDFs that have been created or added are displayed in the Forms Manager window. Forms not created within a folder are stored in the top level of the forms library as shown. Forms created within a folder are listed under that folder's title (see item 5).
5	folder title	When the administrator creates a folder (see item 2), he or she enters the desired name for the folder. The number of forms and PDFs in the folder is given in parentheses.
6	form versions	User-designed forms can be edited as needed. To assist in tracking editing activity, each version of a form is given a version number, with version 1 assigned when the form is created. The form's version number is included in the footer information that is automatically printed at the bottom of a completed form that has been added to a case. When a form is being added to a case, the latest available published version is used automatically.
7	folder options	Where the top level of the forms library only has two options, folders have four options. The two additional options are Rename and Delete . Create Form and Add PDF form (see item 3 above) are actions that take place within the folder. Rename and Delete are actions that take place <i>on</i> the folder itself. Deleting a folder sends all the forms and PDFs within the folder to the Trash folder.
8	form status	Each form or PDF has an associated status depending on whether or not it has been published by the administrator. Publishing normally takes place from within the Form Editor, but can also be handled from the Forms Manager window. Published forms are displayed in the library when forms are added to a case, while Hidden forms are not. Hiding a form allows the administrator to develop and review a form over a period of time.
9	form actions	The actions that can be taken on an existing form or PDF are Edit , Delete , or Publish / Unpublish . Edit brings the form up in the Form Editor. Delete sends the form to the Trash folder. If the form is hidden, it can be published, and if published, it can be unpublished (hidden).
10	Trash folder	The Trash folder lists all forms or PDFs that have been deleted. At the time of this writing, items in the Trash folder cannot be recovered, and the Trash folder cannot be emptied.

Procedure and Guidelines for Creating a Forms Folder

Folders allow you to group forms together based on such things as their function (e.g., assessment / intake forms) or their area of specialization (e.g., dermatology, cardiology). If no folders have been created, all forms and PDFs will appear together in the top level of the forms library.

Although folders can be renamed at any time (thereby possibly changing the folder's basic function and alphabetical position), the individual forms cannot be moved from one folder to another. Individual forms can only be renamed, revised, or deleted. Once deleted, they cannot be recovered. Names of deleted forms are listed in the **Trash** folder providing a record of what has been deleted.

A forms folders helps users find the right form when they are creating a case. When the **Forms** button is pushed in the tConsult Cart software, the user sees the folder names. The user can then expand a folder to view the individual forms and forms library PDFs within the folder. A good folder-naming strategy will guide the user to the right form.

Before you create your first folder and form, spend a little time thinking about how your organization will want to categorize and name the forms and folders. The following are some questions to consider:

- How many forms will our organization need? If many, then list them out and see if they can be organized into logical groupings. Folder names can then be devised based on logical groupings.
- Will forms be designed to meet a broad range of needs, or will they be designed for specific situations or specialties?
- What is the best way to organize forms?
 - by function (e.g., intake, assessment, referral)
 - by medical specialty (e.g., dermatology, ENT)
 - by clinical area (e.g., emergency room, intensive care)
 - by administrative departments (e.g., regional, billing)
 - other
- Will the people who need a form be able to recognize the path to take to find a given form?

To create a new folder, click the **Create new folder** button. A pop-up window will be displayed where you can type in the folder's name (Figure 3).

Note: Folder names are sorted alphabetically in the lists, such as the list of forms you see when you press **Forms** in the tConsult Cart software. One way to change the order is to type a letter or number before the actual name (e.g., "01 Intake, 02 Assessment").

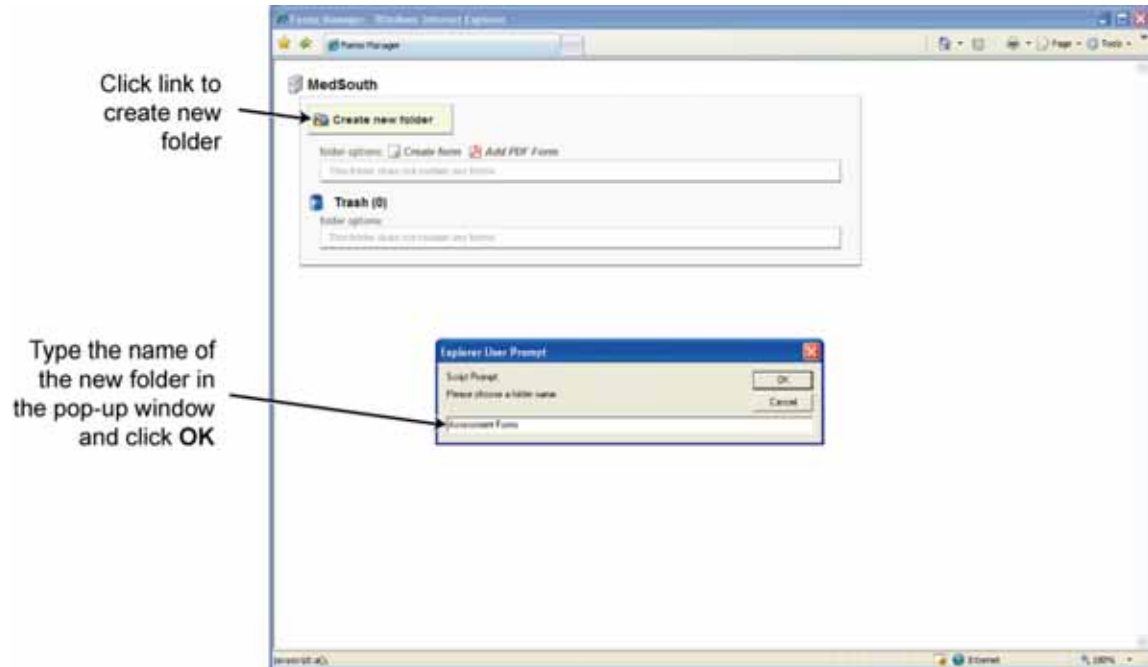


Figure 3
Creating a new folder

Using the Form Editor

Introduction to Form Elements

A form is assembled as a stack of individual items. These items are called **Form Elements**. Adding a form element to a form adds it to the bottom of the stack. Form elements can be rearranged as needed by clicking on and dragging an element up or down and dropping it into the desired position. Adding a new form element or clicking on an existing form element opens that element in a small design window where available features can be entered or selected. Details on the design features for the different form elements are covered later.

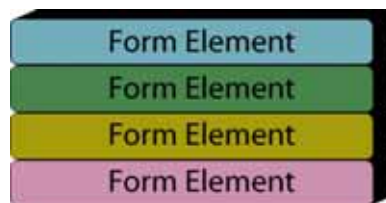


Figure 4
Stack -o- elements

There are nine different form elements that can be added to user-designed forms (see Figure 5). These nine elements fall into three general categories:

- **Read Only** these elements are static; users filling in the form cannot alter them
- **Inputs** these elements allow users to enter data by typing or making selections
- **Data Elements** these elements pull information in from the system

The table below lists the nine types of form elements that can be added to a stack.

Table 3

Form elements in an AFHCAN custom form

Form Element Name	Type	Function
Spacer	read only	A spacer adds one line of white space between other items. It allows groupings of items to be graphically separated from each other.
Heading	read only	The heading consists of bold text that allows a group of items to be labeled.
Text	input	The text item creates a text box (with label) where the user can enter any desired text into the form. Five sizes of text box can be specified.
Radio Buttons	input	Radio buttons provide a list of specific answers or values that the user can select. Radio buttons allow only one of the available choices to be selected.
Check Boxes	input	Check boxes provide a list of specific answers or values that the user can select. The user can select all that apply.
Drop Down	input	The drop-down item allows a drop-down menu to be created. The administrator specifies all the possible selections in the desired order. The user completes the form by clicking on the arrow, opening the list, and selecting one of the items. The data entry box will size itself based on the longest available selection.
Text	data element	The text data element allows the administrator to select from a list of available data elements that can be added to a form. The patient's full name is an example. The data is inserted automatically by the system. The user completing the form may not be able to modify this information.
Drop Down	data element	The drop down data element allows the person completing the form to select an item from a list available on the system. An example is a list of local providers, which is generated by the system.
Electronic Signature	data element	The electronic signature data element allows the person completing the form to sign the form by entering a special e-signature password. Details on setting up e-signature passwords and utilizing this feature are provided in GSG-103, <i>Getting Started Guide, Electronic Signatures</i> .

Opening the Form Editor

The Form Editor is opened from the Forms Manager window as follows:

1. Select the folder where you want the form to reside.
2. To create a new form, click on **Create form**.



3. To edit an existing form, click on **Edit**.



The figure below shows the Form Editor when a new form is first being created:

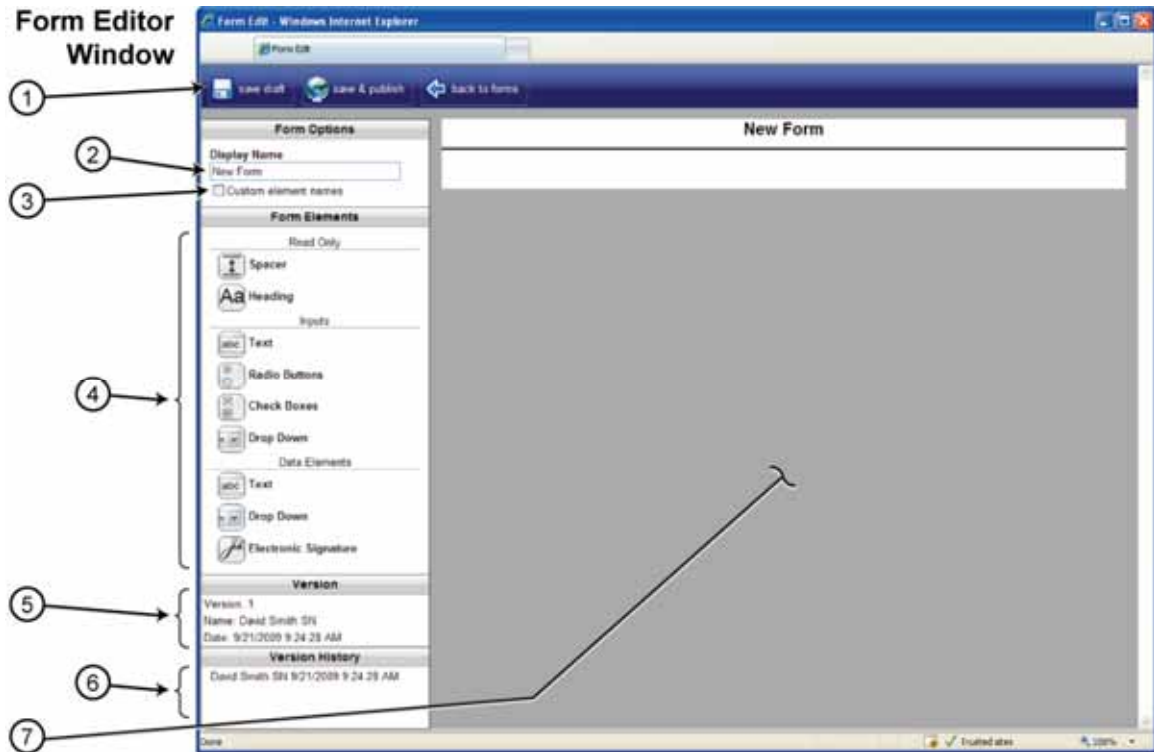





Figure 5
Form Editor

Table 4 on the next page describes the items called out in Figure 5.

Table 4

Explanation of items in Figure 5, Form Editor Window

Callout	Item	Description
1	The three buttons at the top of the window are used to terminate an editing session. They specify how the form will be saved.	
		The save draft button saves the layout being displayed, but sets its status as hidden (unpublished).
		The save & publish button saves the layout being displayed, increments the form's version number, and sets its status as published.
		The back to forms button returns to the Forms Manager window without saving the layout being displayed. If the form already exists, no change is made. However, if the Form Editor was opened via the create form link, the New Form will be displayed in the list, and must be manually deleted.
2	Display Name	Enter the form's title in the <i>Display Name</i> field. This title will appear at the top of the form and in the list of available forms.
3	Custom element names	The <i>Custom element names</i> checkbox should never be checked. It is a highly advanced feature that allows data to be extracted from forms in special situations. Incorrect use can cause technical difficulties.
4	Form Elements	This is a list of the available form elements. Click on a form element to add it to the form. All new form elements are added at the bottom, but can be repositioned in the stack by dragging and dropping.
5	Versions	This area displays information on the current version of the form.
6	Version History	This area displays a list of the users who saved the previous versions of the form and when.
7	Work Area	The work area is where form elements are added and edited. It provides a good indication of the form's actual appearance.

Example of a Completed Form

The form shown below shows how a completed form might look in the Form Editor work area. It includes all form elements except a spacer. Items are arranged horizontal layout (element labels to the left of the data entry fields). Various sizes for text boxes are also shown.

Figure 6 shows a completed form in the Form Editor work area. The form is titled "Vital Signs" and contains several sections:

- Display Name:** Vital Signs
- Heading:** Patient Information
- Text data element:** Patient Name (Patient Full Name)
- Check Boxes:** Alerts (allergies, diabetic, fall risk, contact precautions, other)
- Text (various widths):** Basic Vital Signs (Temperature (deg F), Heart Rate (bpm), Blood Pressure (mmHg), Respirations per Minute)
- Label for element:** Pain Rating (0 - 10)
- Drop Down:** Pain Site
- Radio Buttons:** On Pain Medication? (yes, no)
- Drop Down data element:** Patient's Provider Preference (Telehealth Provider (Local providers on this system))
- Text (multi-line):** Comments (Additional Information)
- Mouse-over highlights element: click to edit:** Additional Information
- Electronic Signature data element:** Signature of Provider Completing Form (Required) (Electronic Signature, Sign)

Figure 6
Completed form in the Form Editor work area

Form Element Details

An editing window for each form element will open when you do either of the following:

- add a new form element by clicking on one of them in the left column
- open an existing form element by clicking on it within the work area

Note: In the following sequence of illustrations, particulars of the editing windows are explained only in the first illustration where they appear. For example, all form elements have an *Apply* or *Delete* feature -- these are mentioned only in the first illustration describing the *Spacer* form element.

The *Spacer* element is simple. There is nothing to type in and no formatting options to specify.



Figure 7

The Spacer form element

The *Heading* element is also simple. Type in the text you want to display as a heading and click *Apply*.



Figure 8

Editing the Heading form element

The *Text* form element creates a text box where the user completing the form can type any desired information. The size of the text box does not limit the amount of text that can be entered: all of the text the user typed will appear when the completed form is displayed or printed.

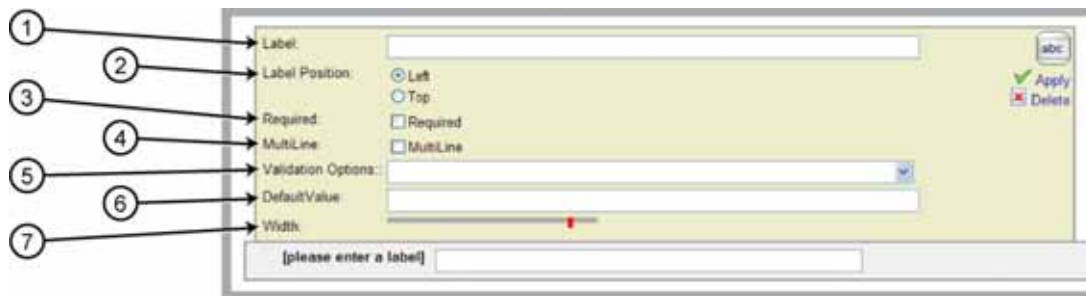


Figure 9

Editing the Text form element

Table 5 below describes the items called out in Figure 9. In general, the Text form element allows users the greatest amount of freedom to enter information.

Table 5

Explanation of items in Figure 9, Editing the Text form element

Callout	Item	Description
1	Label	Most data elements include a label that the designer of the form creates. Good labels make it clear what information is to be entered by the user. The Label can include more characters than the text entry box can display; however, all the characters typed will be displayed in the preview area at the bottom of the editing window.
2	Label Position	The label may be positioned so it appears above the data entry field, or to the left of it. With long labels, they may look better when positioned above the data entry field.
3	Required	The designer of the form can make a form element a required item. When checked (selected), an asterisk will appear next to the element's label indicating the item is required. When a user is filling in the form, the system will refuse to let the user save the form until an entry has been made in this field. (It is recommended that this feature be used only when necessary because it can be frustrating when a piece of information is not available at the time the form is being completed.)
4	MultiLine	The vertical size of a text box can be changed so it displays six lines of text instead of just one line. This makes it easier to review long entries (such as patient progress notes, which may be in narrative form). If more than six lines are present in the entry, scroll bars will appear.
5	Validation Options	There is a limited set of validation options available. These options limit user's input to specific formats. The goal is to promote consistent data entry practices.
6	Default Value	A default value can be specified. This default value will automatically appear in the text box when the form is opened by the user. Users can delete the default and enter their information as desired when they complete a form.
7	Width	Text boxes can be set to five different widths by clicking on and dragging the red marker left and right on the scale. The shortest box can display about 15 characters, while the longest box can display about 75 characters. It is possible to type in more characters than can be displayed, and the entire entry will be shown on the printed form.

The **Radio Button** form element gives the user a limited number of possible selections, and allows only one selection to be made. All the possible choices are visible on the completed form.

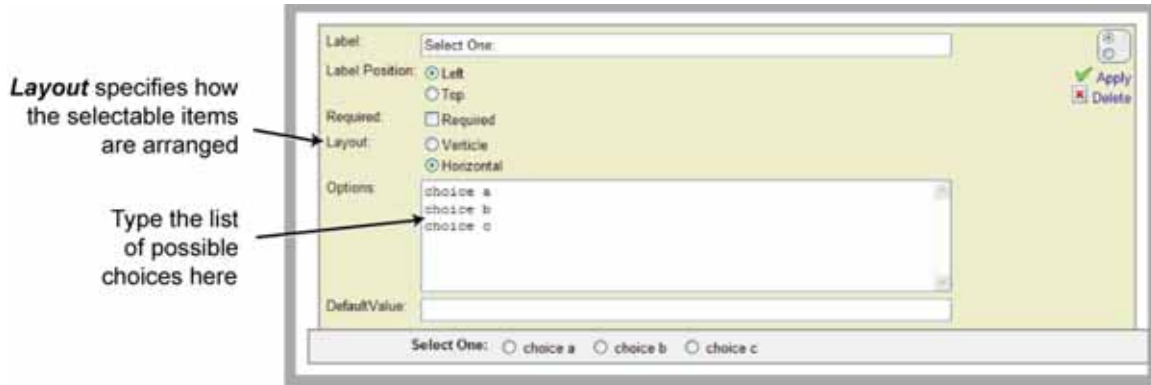


Figure 10
The Radio Button form element

The **Check Box** form element is almost identical to the **Radio Button** form element, except that the user can select however many items are appropriate (zero, one, some, or all items).

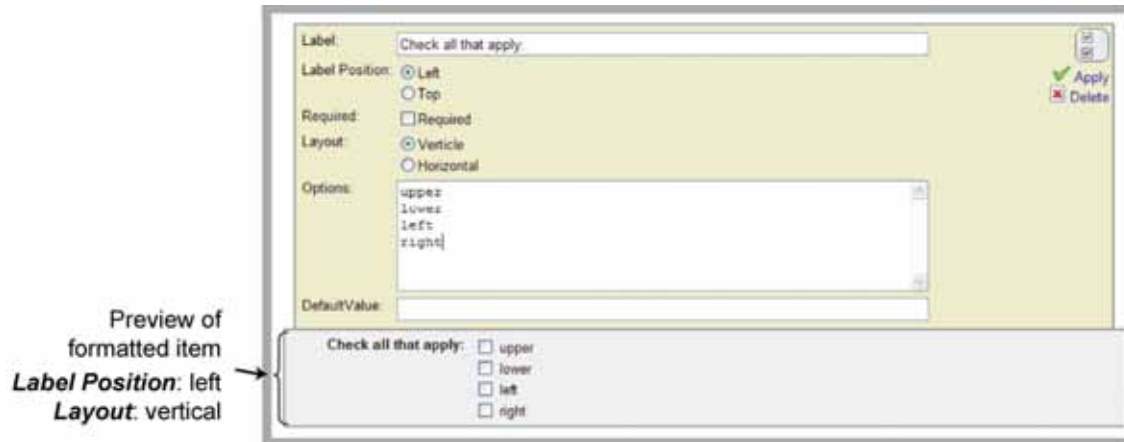


Figure 11
The Check Box form element

The **Drop Down** form element is a compact way to display a list of selectable choices. Only one of the possible selections can be chosen. The width of the box adjusts automatically to fit the size of the longest option. Only the selected item is visible on the completed form.



Figure 12
The Drop Down form element

The **Text** data element allows system information to be brought into the form automatically. The information is based on the selected patient or case. An option is available to allow the user to edit the system information. However, it is usually better to edit the patient or provider record.

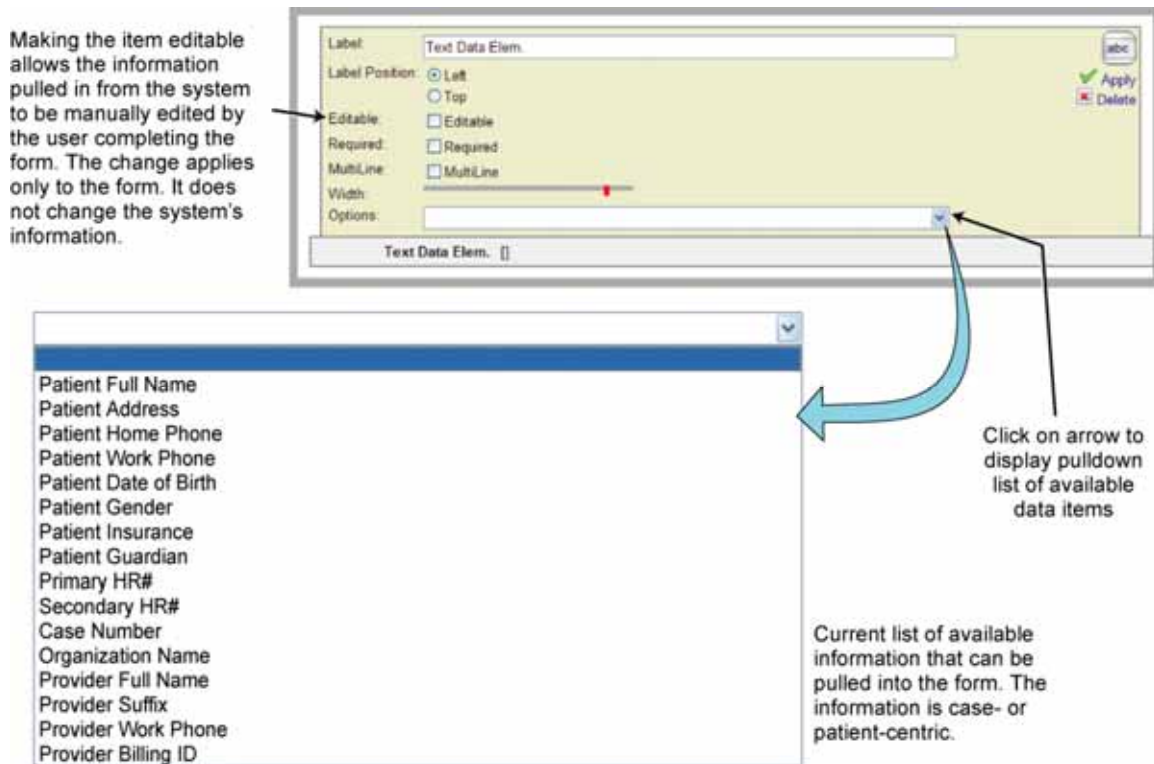


Figure 13
The **Text** data element

The **Drop Down** data element allows lists of information from the system to be added to the form and selected by the person completing it. The information is based on what the system has available, and is not directly related to the patient or the case (but the user's selection will be included in the case).

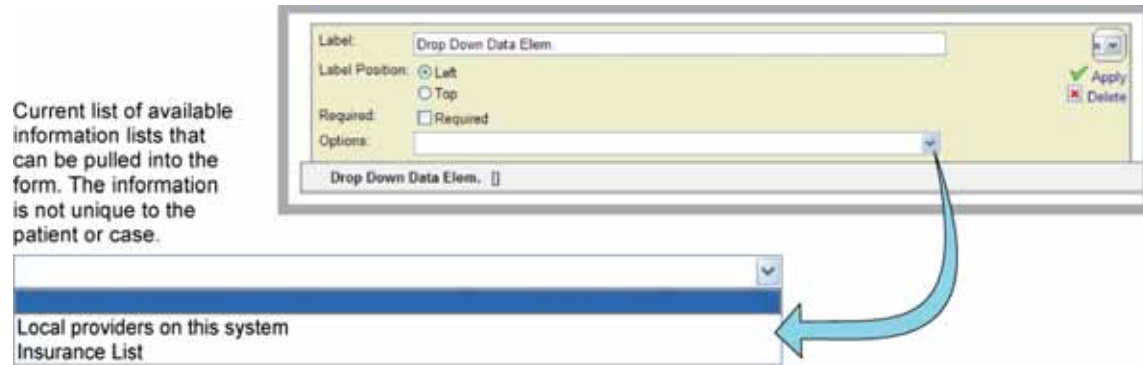


Figure 14
The **Drop Down** data element

The **Electronic Signature** data element allows the form to be signed electronically. The electronic signature feature requires that an e-signature password be set up in the user's account of the individual completing the form. For details on electronic signatures, refer to GSG-103, *Getting Started Guide, Electronic Signatures*.

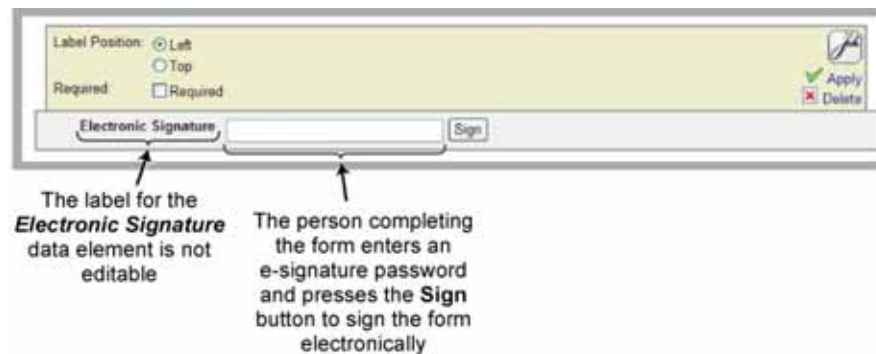


Figure 15
The **Electronic Signature** data element

Forms Library PDFs

Adding or Editing Forms Library PDFs

To add or edit a forms library PDF:

1. Go to the Forms Manager window.
2. Select a suitable folder, or add directly to the top level of the forms library.
3. To add a new form, click on **Add PDF Form**.

folder options: Rename Delete Create form Add PDF Form

4. To edit an existing form, locate the form name in the list, and click on **Edit**.

Diabetes Handout v 1 Published [Edit](#) [Delete](#) [Unpublish](#)

Adding or editing a forms library PDF opens the exact same dialogue box, shown in the figure below.

Note: Editing a form brings up the same window. No information from the current form is brought forward to the window.

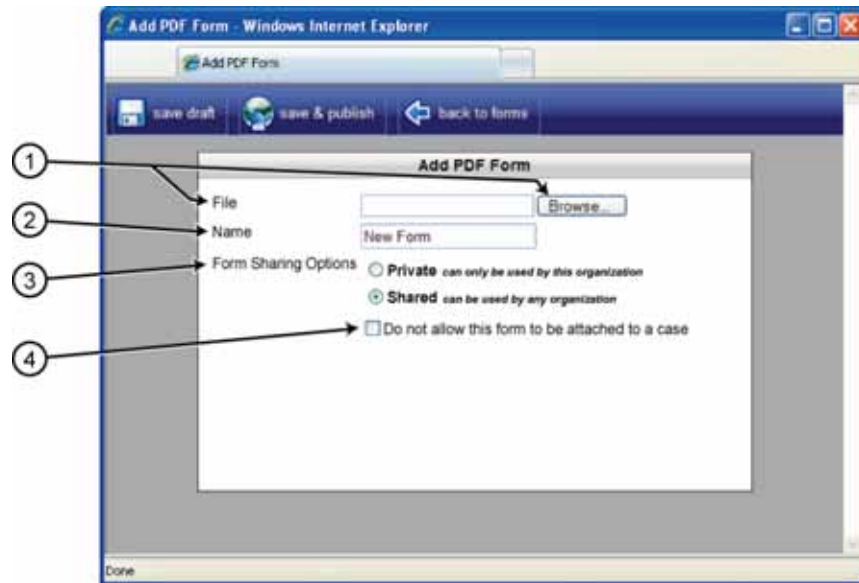


Figure 16

Dialogue box for adding or editing a forms library PDF

The items called out in Figure 16 above are described in Table 6 below.

Table 6

Explanation of items in Figure 16, Add PDF Form dialogue box

Callout	Item	Description
1	File	Specify the path and filename where the desired PDF can be found. Alternatively, click on the Browse button to open a Windows browser that will allow you to browse to and select the file. The path and filename will automatically be entered in the File field. Once added, the PDF will be copied to the AFHCAN system (in other words, the original file does not need to be retained in its original location).
2	Name	The name of the PDF is similar to the Display Name in forms. This is the name that will be shown in the forms library when adding the PDF to a case.
3	Form Sharing Options	Different organizations may be set up with server-to-server communications, which allows cases to be sent from one organization to another. The forms designed by one organization can be made available to another organization's forms library. Individual PDFs can be marked as sharable or private. Shared PDFs will be listed when another organization views your forms library.
4	attachment option	Care of a patient often includes patient education. The forms library can serve as a resource file for patient education materials. This is a convenience feature allowing providers to print out materials while developing a case. A non-attachable PDF would be obtained by the same procedure used to add a form; however, when the PDF is selected from the forms library, a message is displayed saying the form can be printed but cannot be added to the case.

Note: Some PDF documents are designed as electronic forms with fields that can be filled in by the user. This type of form is not supported in the AFHCAN system. Technical limitations prevent the data entered from being retained when such forms are obtained via the forms library. The form can be saved to a case, but the data will be cleared.

Deleting Forms Library PDFs

Deleting a forms library PDF is the same as deleting forms. In the Forms Manager window, click on ***Delete*** to send the item to the Trash folder.

Note: At the time of this writing, it is not possible to recover deleted items from the Trash folder.

end of document