Apricot
Designing Forms for Tracking Services, Case Notes, Interactions

Bonterra™

Meet Your Trainer

Jaime Ransom

Training & Development Associate

Learning Objective

Review best practices for designing Tier 2 Forms in Apricot so that Administrators can make informed decisions when creating new forms from scratch.

Agenda

- Purpose of Forms
- Best Data for Tier 2 Forms
- Design Best Practices
- Testing Your Design

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Purpose of Forms

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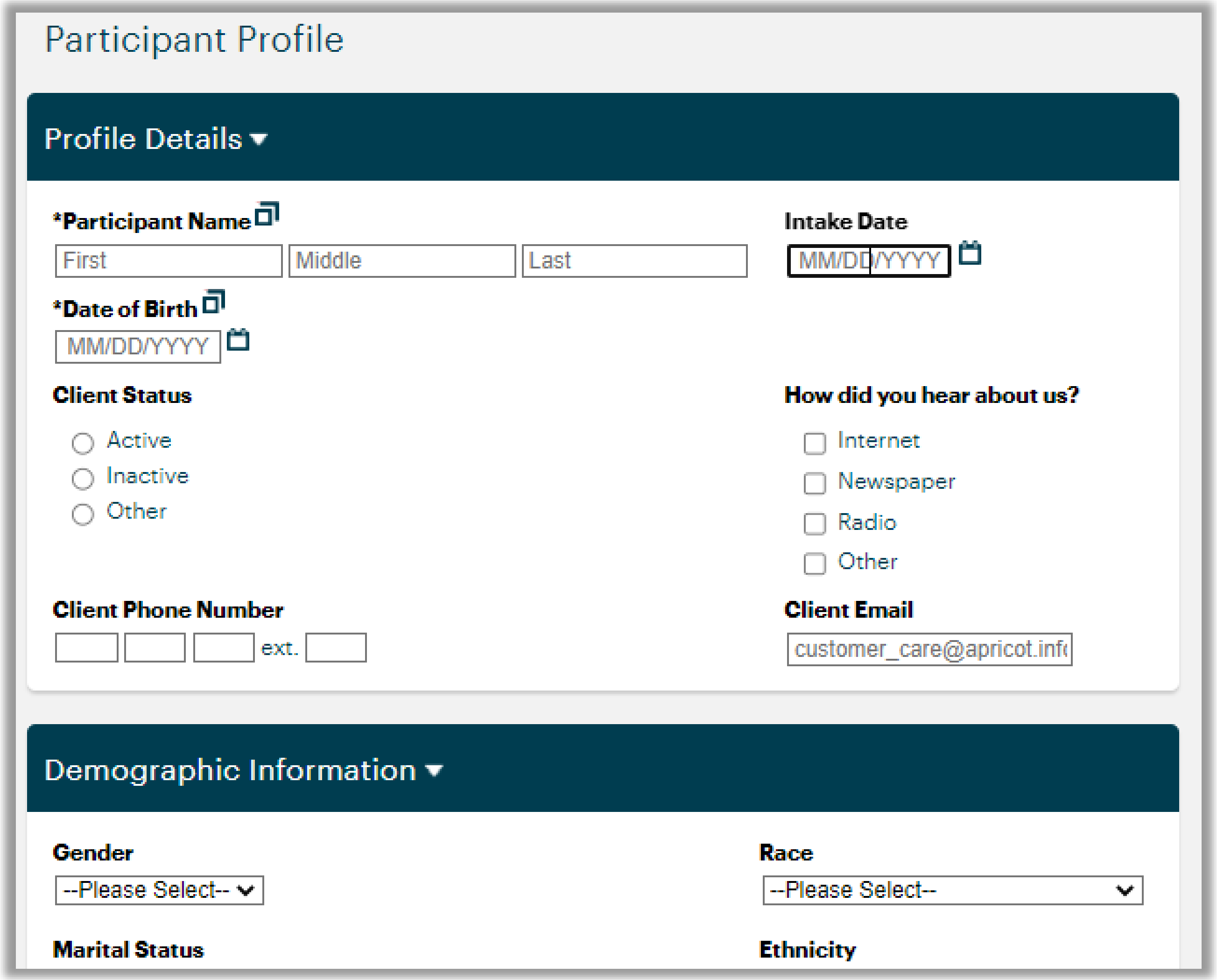
<u>Blank Electronic Templates For Tracking:</u>

Purpose of Forms

<u>Blank Electronic Templates For Tracking:</u>

- Demographics



Participant Profile

Profile Details ▾

*Participant Name

First | Middle | Last

Intake Date

MM/DD/YYYY

*Date of Birth

MM/DD/YYYY

Client Status

- Active
- Inactive
- Other

How did you hear about us?

- Internet
- Newspaper
- Radio
- Other

Client Phone Number

ext.

Client Email

customer_care@apricot.inf

Demographic Information ▾

Gender

--Please Select--

Race

--Please Select--

Marital Status

Ethnicity

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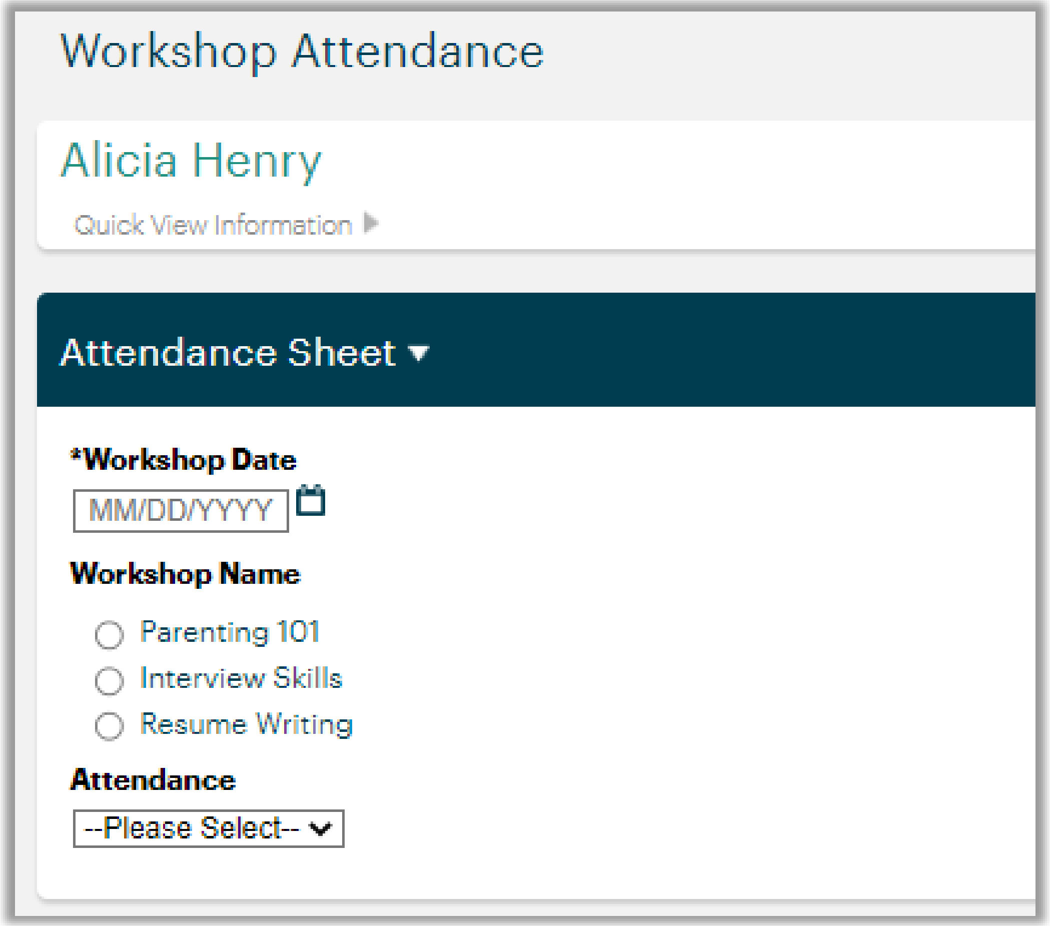
Purpose of Forms

<u>Blank Electronic Templates For Tracking:</u>

- Demographics
- Outputs



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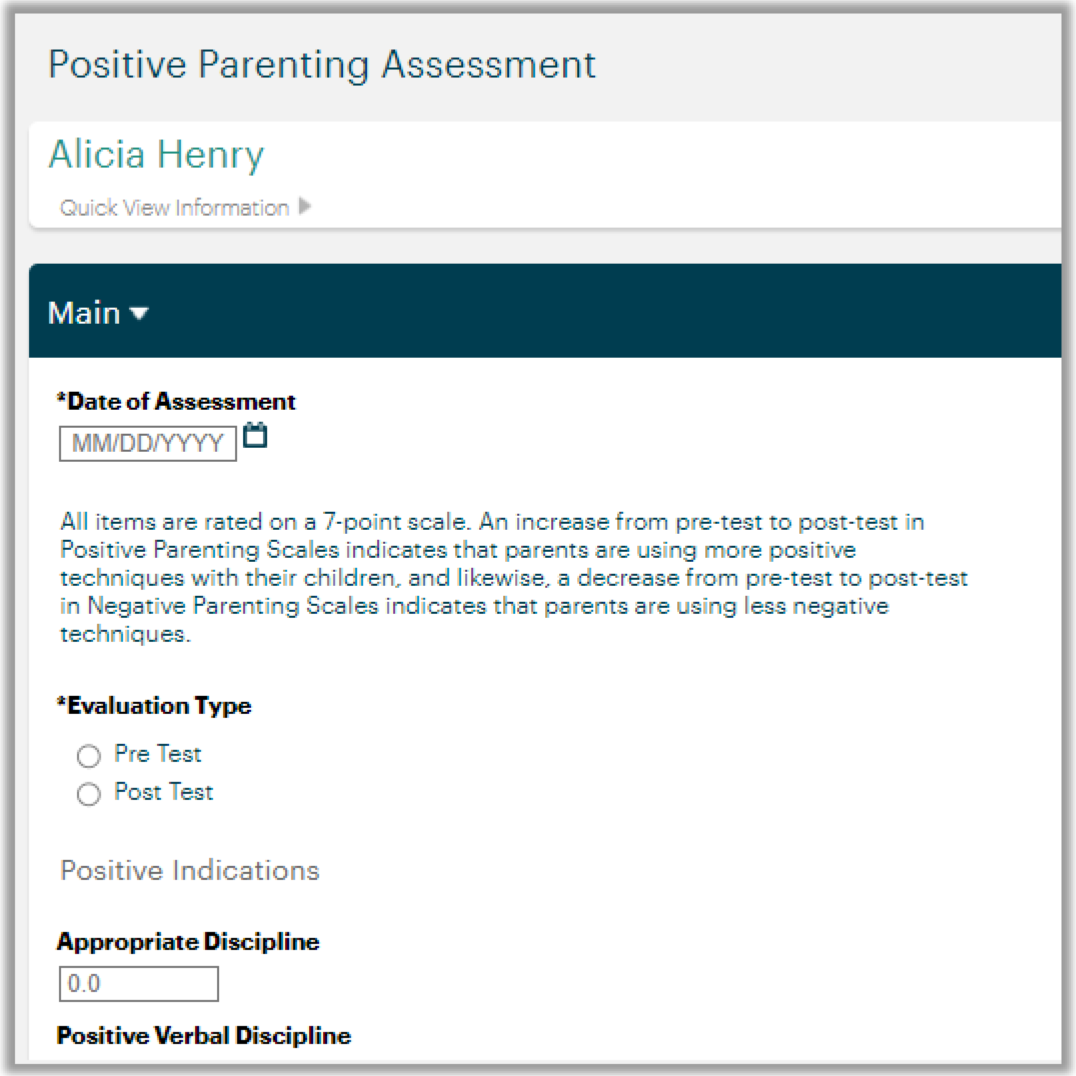
Purpose of Forms

<u>Blank Electronic Templates For Tracking:</u>

- Demographics
- Outputs
- Outcomes



Positive Parenting Assessment

Alicia Henry

Quick View Information

Main

*Date of Assessment

MM/DD/YYYY

All items are rated on a 7-point scale. An increase from pre-test to post-test in Positive Parenting Scales indicates that parents are using more positive techniques with their children, and likewise, a decrease from pre-test to post-test in Negative Parenting Scales indicates that parents are using less negative techniques.

*Evaluation Type

- Pre Test
- Post Test

Positive Indications

Appropriate Discipline

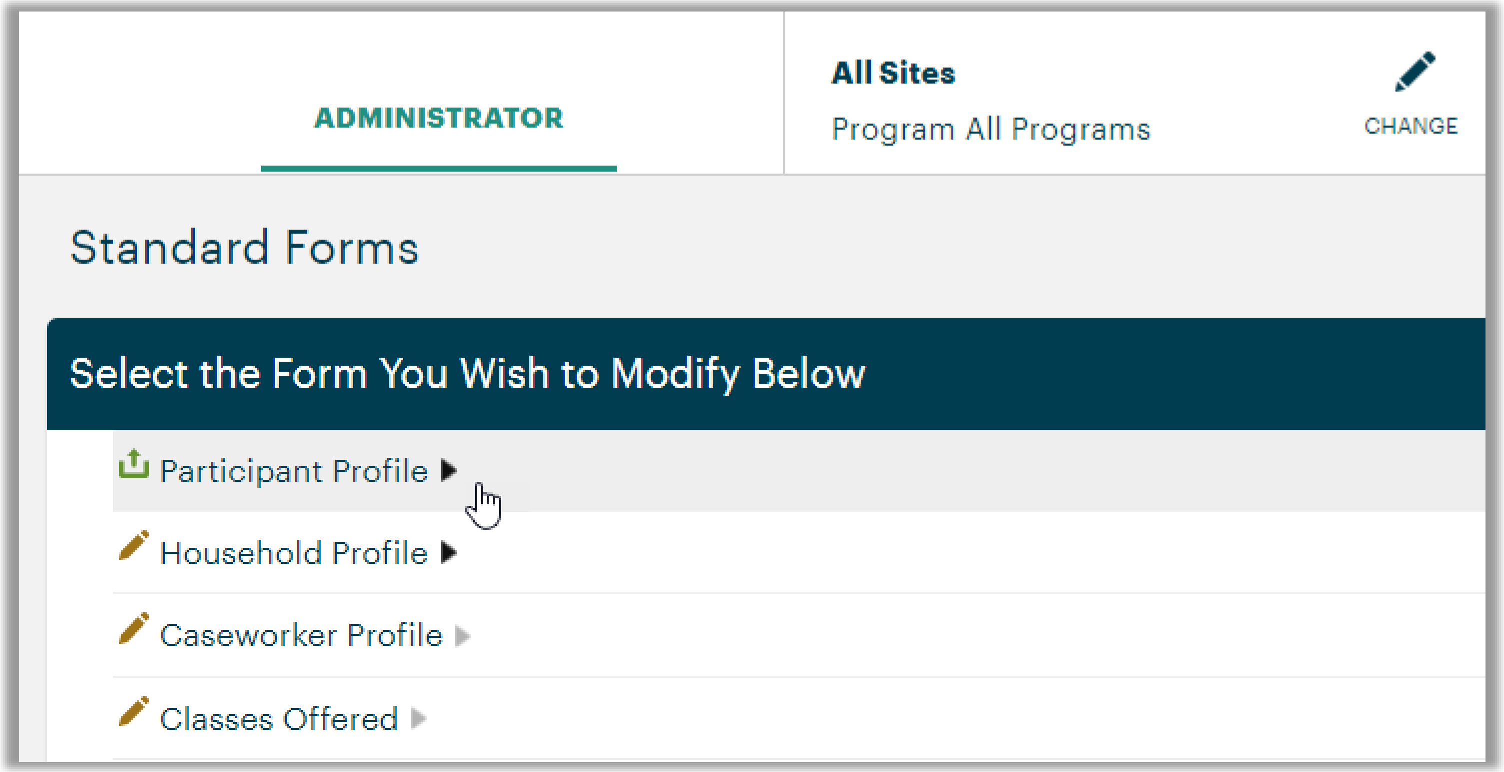
0.0

Positive Verbal Discipline

Purpose of Forms

Two Types:

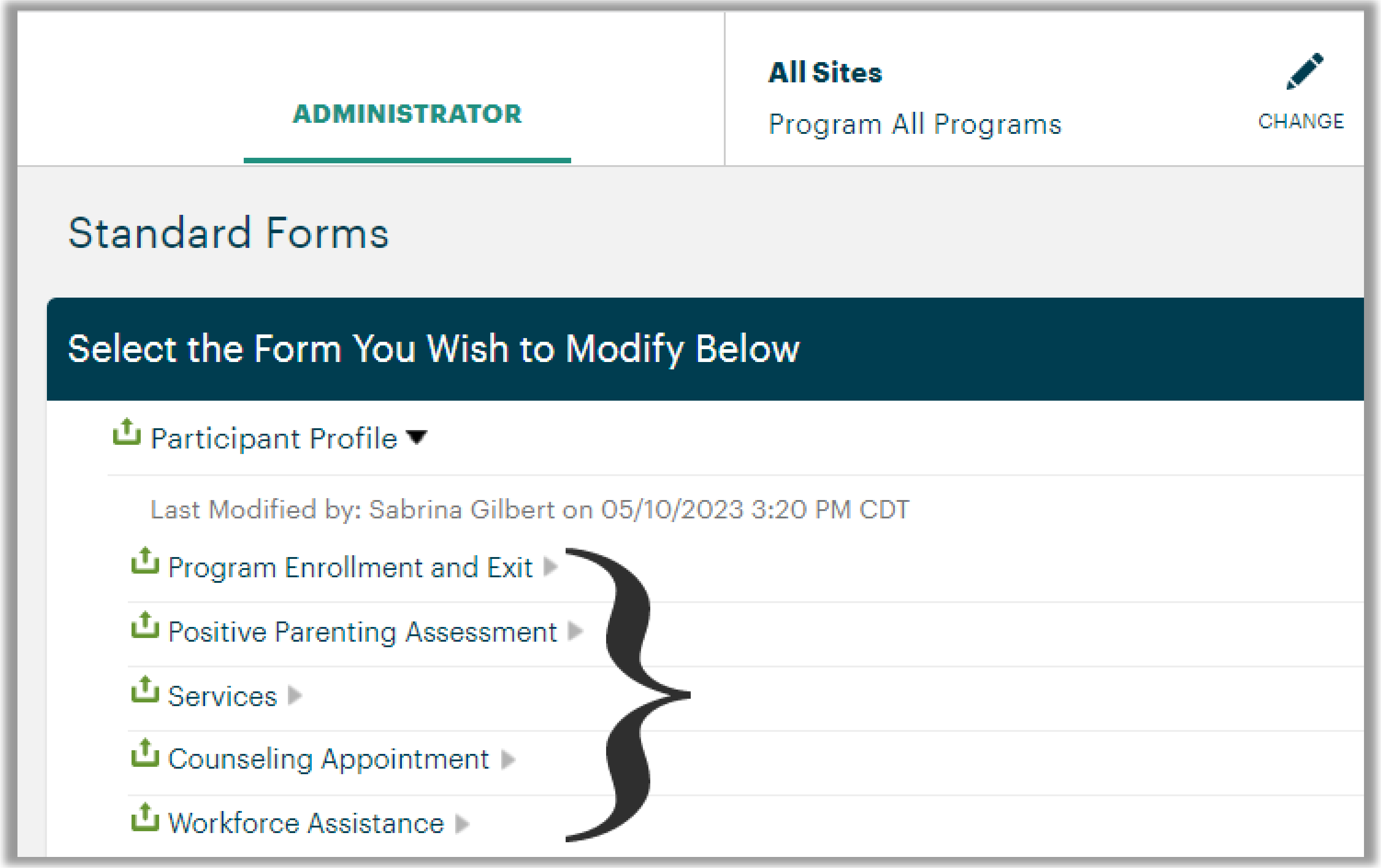
- Tier 1 Forms



Purpose of Forms

Two Types:

- Tier 1 Forms
- Tier 2 Forms



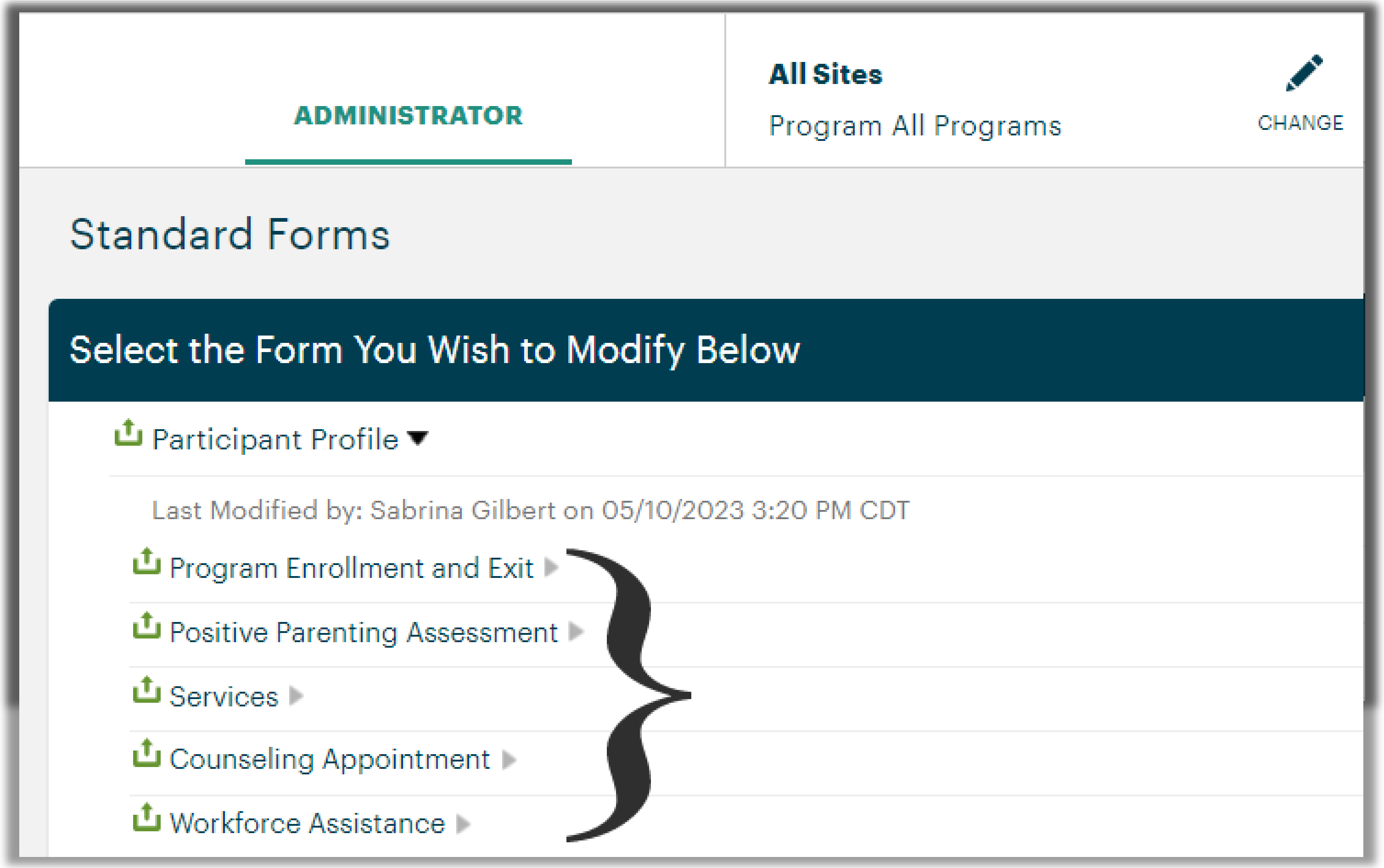
Purpose of Forms

Two Types:

- Tier 1 Forms
- Tier 2 Forms

1st step of designing forms is deciding if It's a Tier 1 or Tier 2 Form.

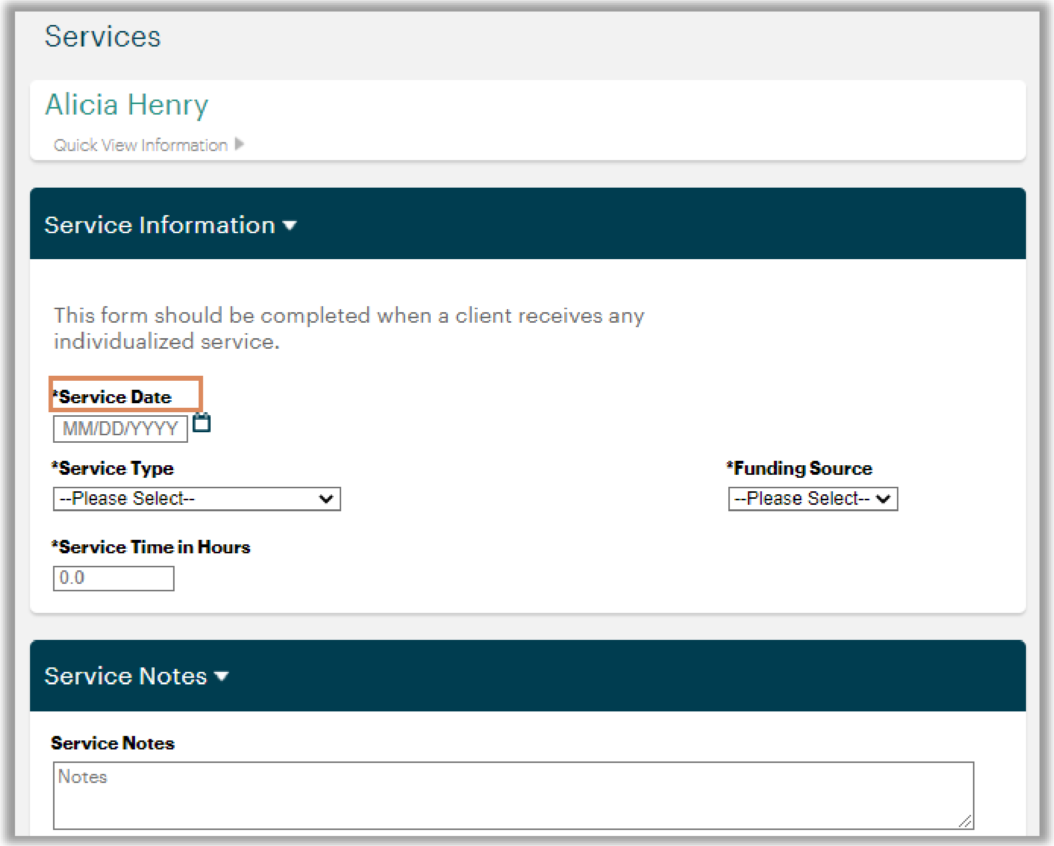
Cannot Change Type.



Best Data for Tier 2 Forms

Best Data for Tier 2 Forms

- Capture Snapshot in time of interactions with a subject.



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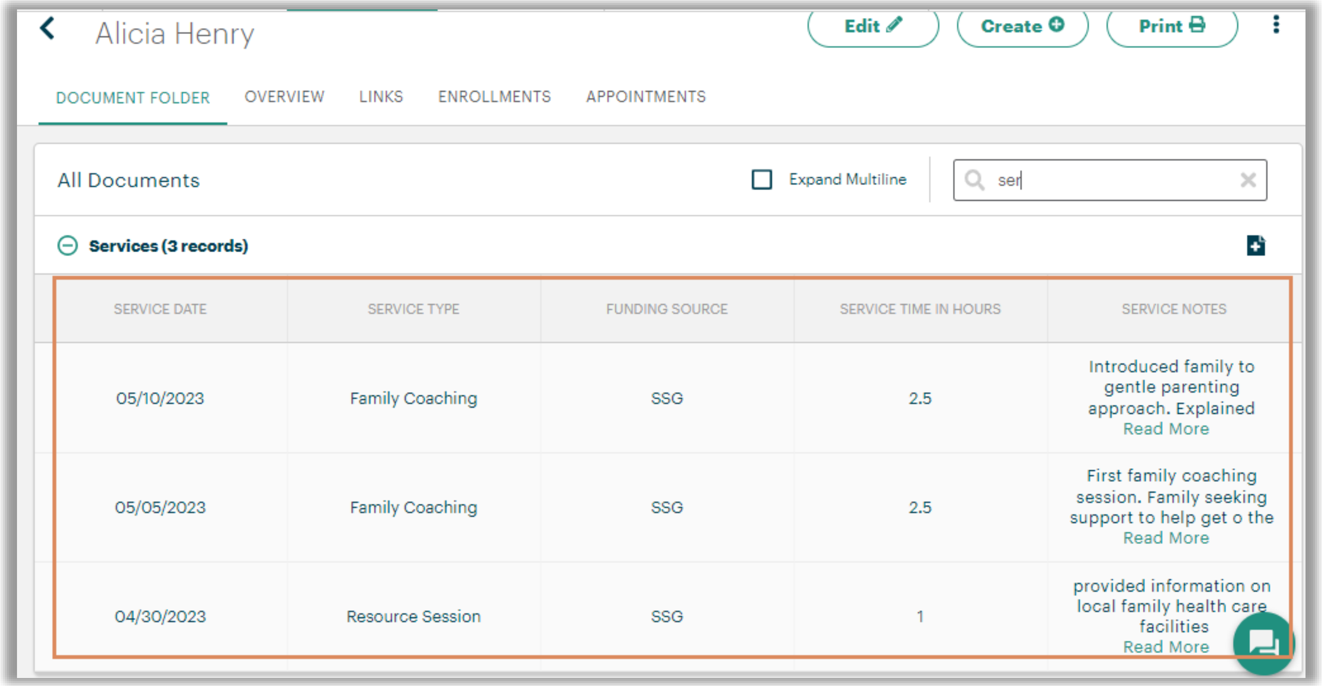
Best Data for Tier 2 Forms

- Capture Snapshot in time of interactions with a subject.
- Becomes historical narrative.
- Designed to be recorded multiple times.



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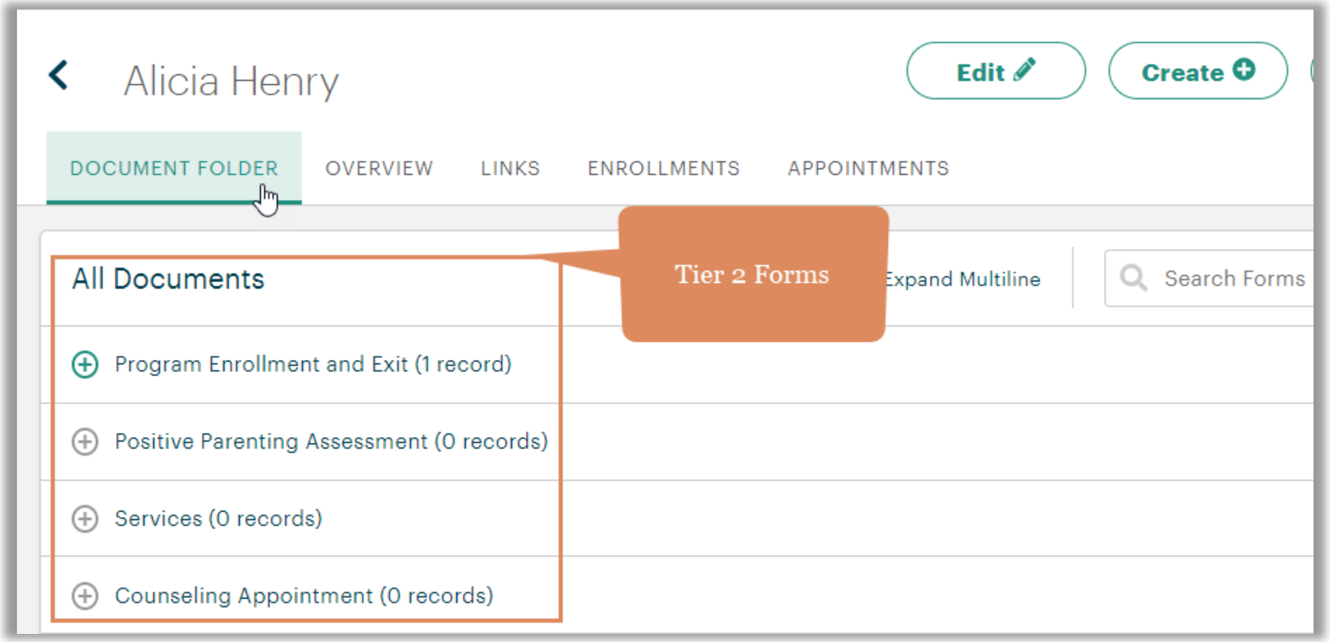
Best Data for Tier 2 Forms

- Capture Snapshot in time of interactions with a subject.
- Becomes historical narrative.
- Designed to be recorded multiple times.
- Nested in the Document Folder.



Should it be a Tier 1 or Tier 2 Form?

<u>Good questions to ask when deciding:</u>

1. Can individuals have this entered multiple times?
2. Will the data tracked via this form be used to measure change over time?

Should it be a Tier 1 or Tier 2 Form?

Would a form tracking Case Notes be best tracked as a Tier 1 or Tier 2 Form?

Answer the via Poll.

Good questions to ask when deciding:

1. Can individuals have this entered multiple times?
2. Will the data tracked via this form be used to measure change over time?

Contact Log for Case
Notes & Service Coordination

Client (Last, First, MI): Doe, John J.
MA ID Number: 1234567890
Case Manager – Name: Sue Smith
Agency: ABC County
Title: MSW

Description Codes (to be used in the second column below)
BF = Beneficiary Contact – Face to Face
CF = Collateral Contact – Face to Face
S = Staffing/Consultation
BT = Beneficiary Contact – Telephone
CT = Collateral Contact – Telephone
R = Record Keeping
T = Travel Time to Provide Services under BF

Date	Code	Place of Service	Hours	Minutes	Documentation of Activities (sign or initial each entry)
1/1/03	S	County Office		15	Consultation with county personal care provider at county office regarding arranging personal care service for client, John Doe, since he is having problems performing cares. Supervising nurse, Jessie Jones, from ABC personal care agency will set up appointment with client to do assessment within the next week. Will talk to her after the assessment to see if Mr. Doe qualifies for personal care. S.S., MSW

Monthly Total: ____________

Total Units: ____________

Signature/Title: Sue Smith, MSW

Date: MM/DD/YY

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Design Best Practices

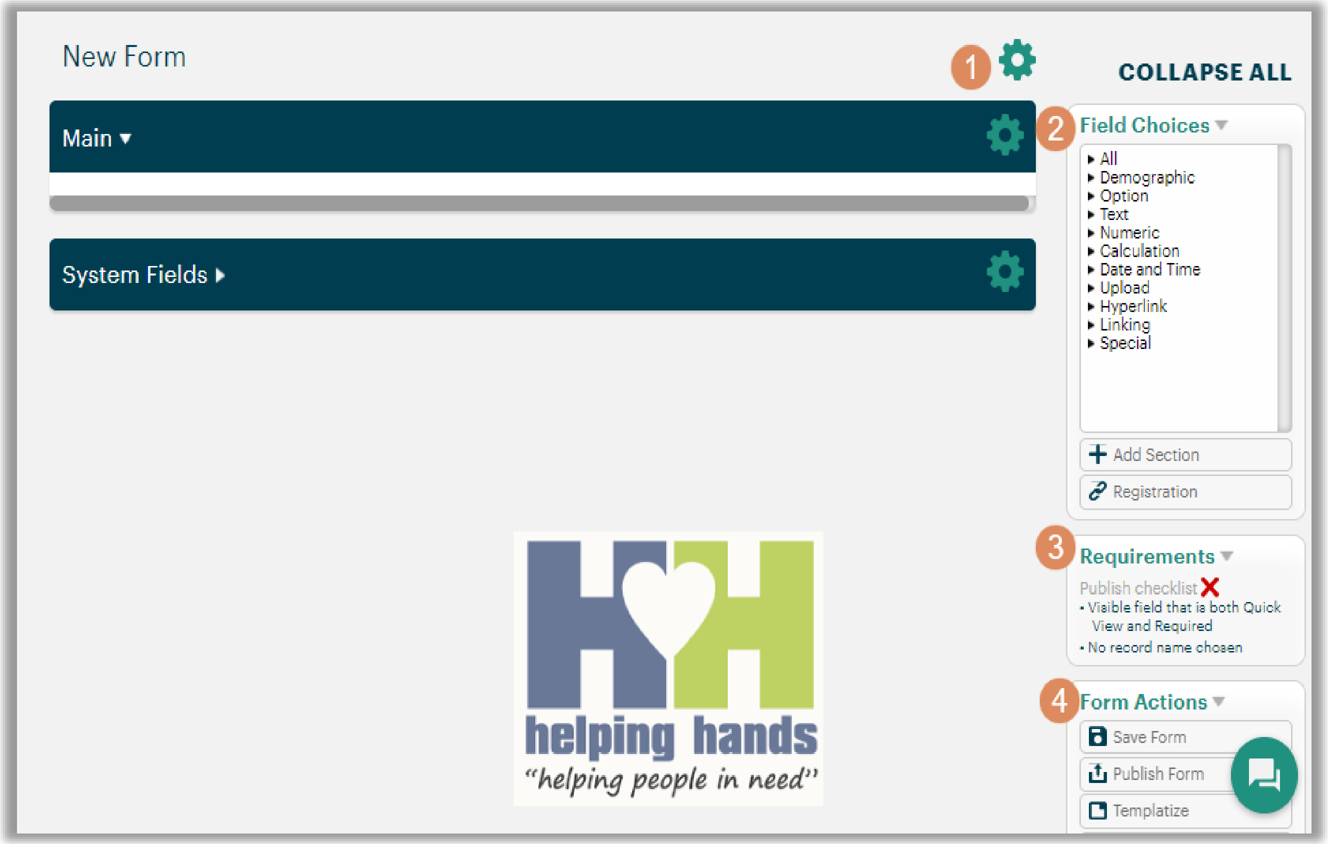
Designing Tier 2 Forms

Steps:

1. New Tier 2 From Scratch
2. Manage Form Properties
3. Add Field Choices
4. Manage Field Properties
5. Publish Form

Designing Tier 2 Forms

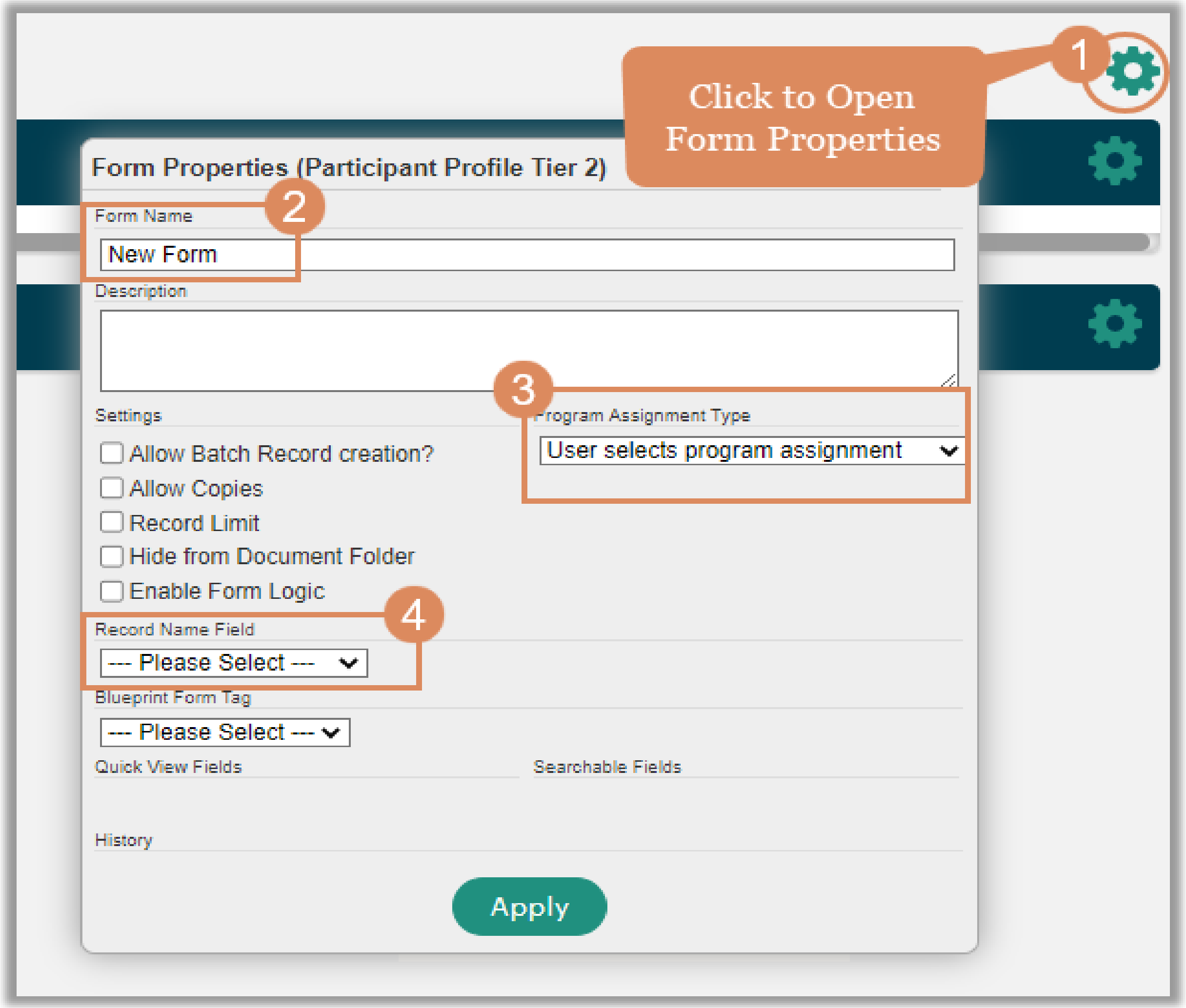
1. Gear Icon – Change Properties
2. Field Choices – Add questions
3. Requirements – basic best practices
4. Form Actions - Publish



Designing Tier 2 Forms – Form Properties

Step 2: Manage Form Properties

- Rename
- Set Program Assignment Type
- Select Record Name Field



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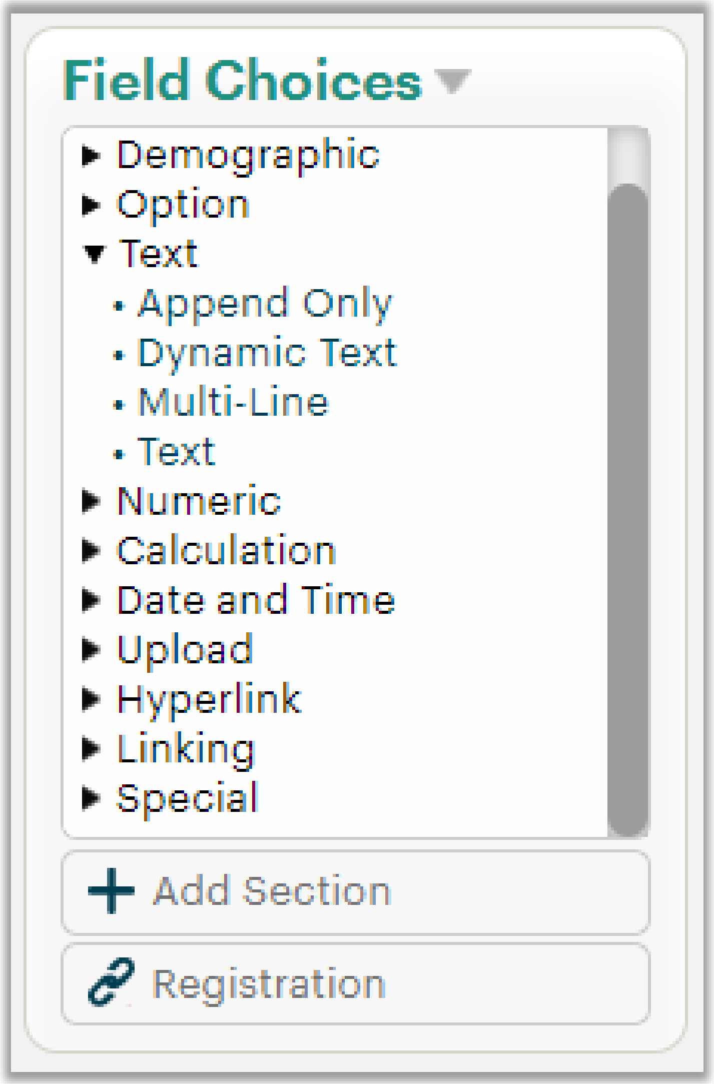
Designing Tier 2 Forms - Field Choices

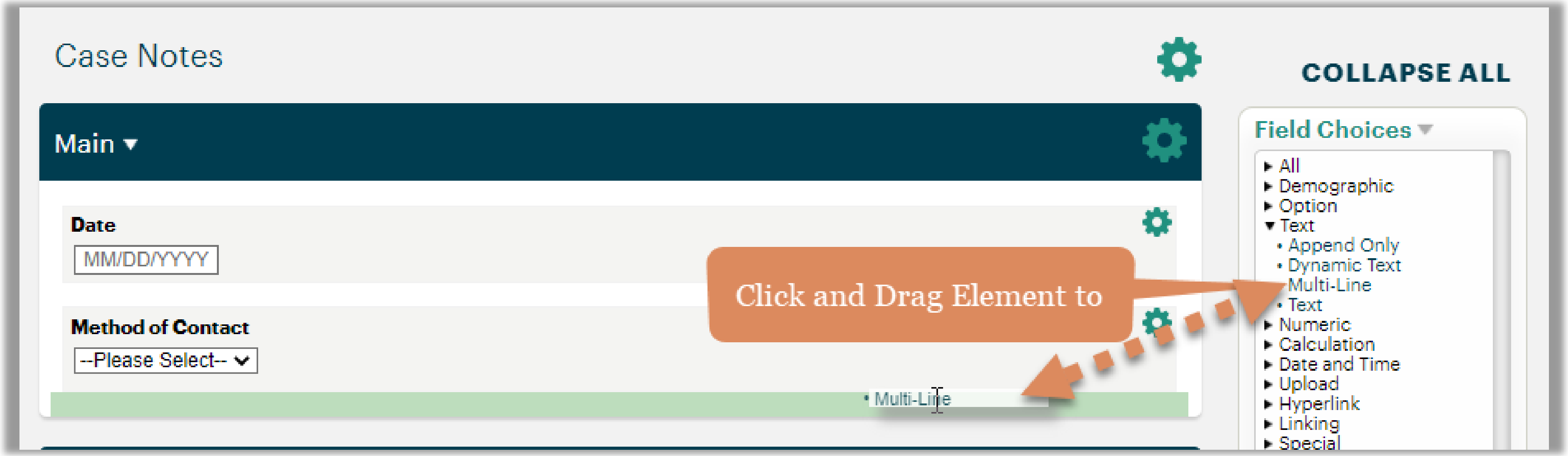
- **Demographic** – Preset Fields like phone number/address
- **Option** – Multiple Choice Response
- **Text** – Open text like case notes
- **Numeric** – money, decimal and numeric data
- **Calculation** – perform math operations in form
- **Date and Time** – track date data like date of birth
- **Upload** – attach files or images
- **Hyperlink** – track email or web addresses
- **Linking field** – connect related records for reporting
- **Special Fields** – signature element and instructions



Designing Tier 2 Forms - Field Choices

<u>Step 3: Add Field Choices:</u>

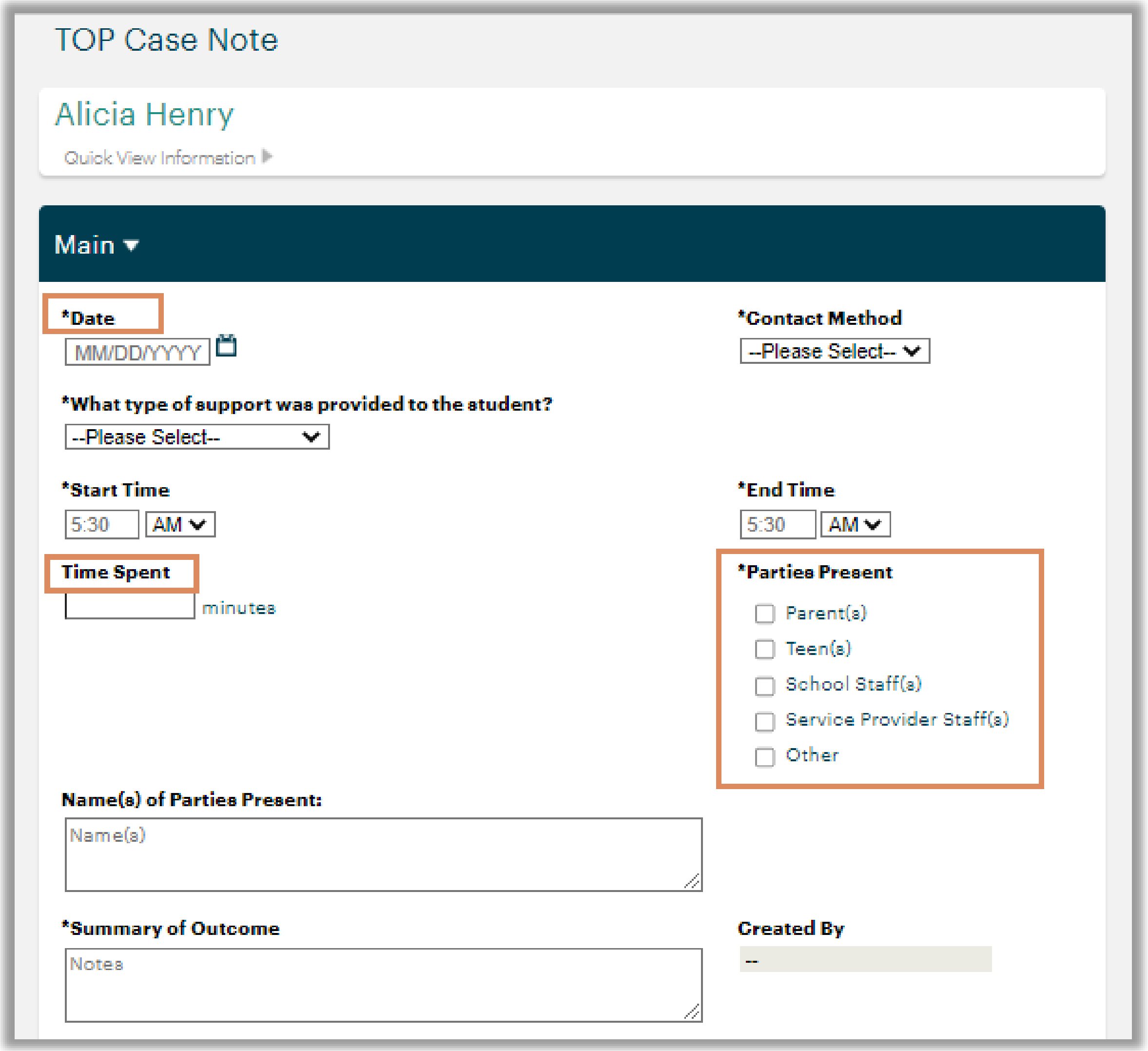
Best Practice - Start with the END in mind.



Designing Tier 2 Forms - Field Choices

Questions to ask when choosing a field type:

1. What do I need to report on for funders and internally?
2. Do I need to be able to pull statistical data from this field?
3. What information is a MUST have vs. a nice to have?



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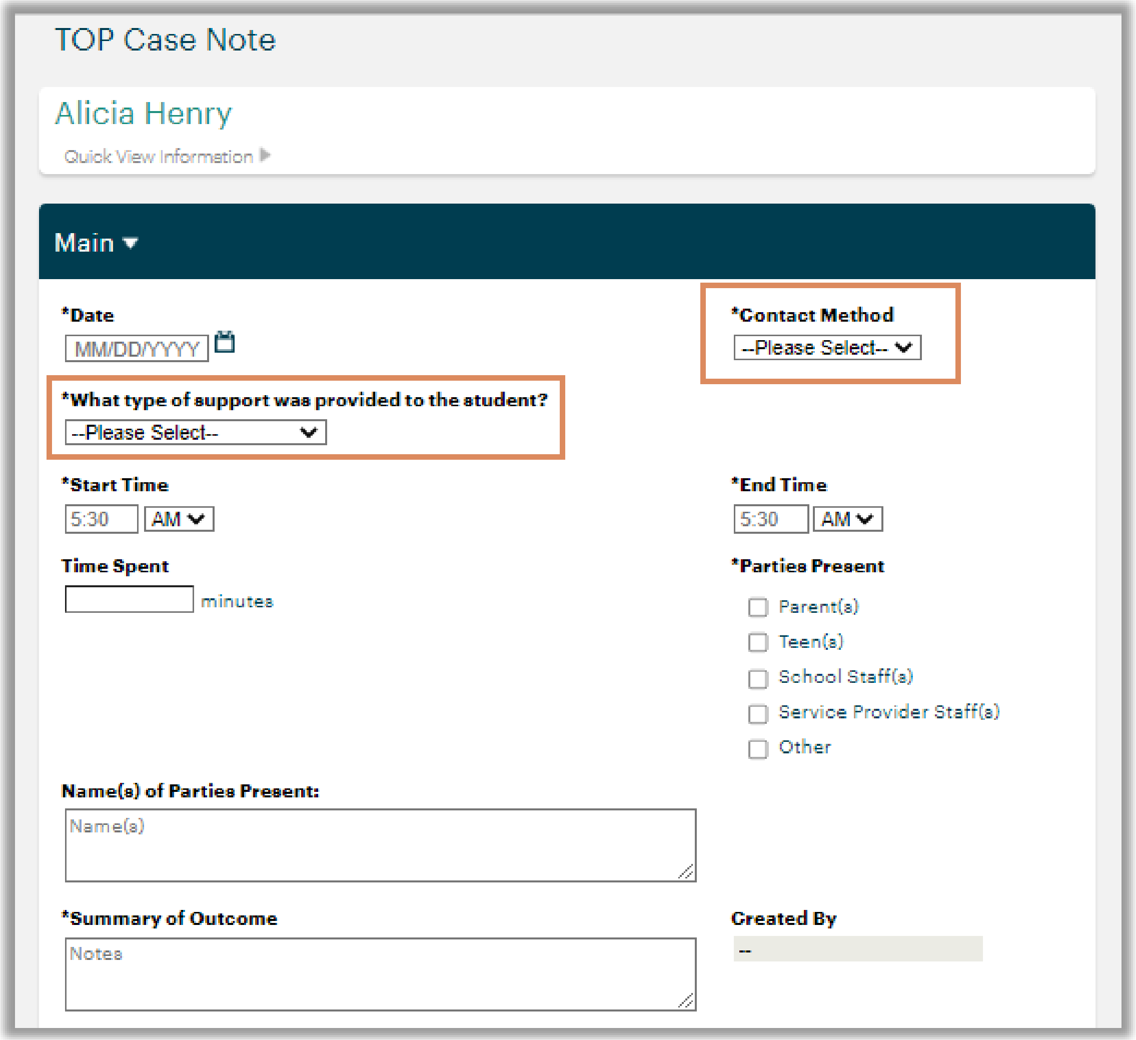
Designing Tier 2 Forms - Field Choices



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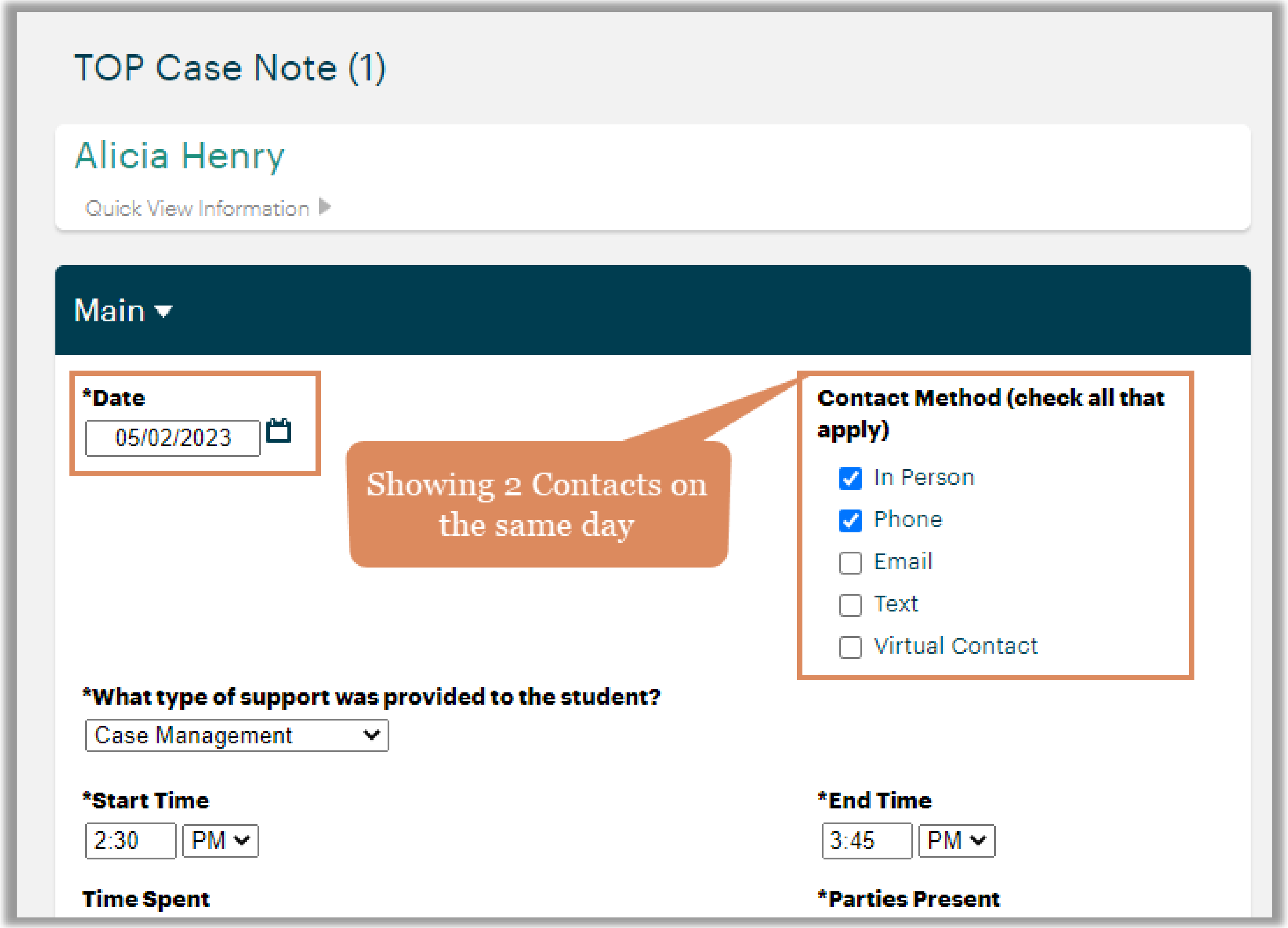
Designing Tier 2 Forms - Field Choices



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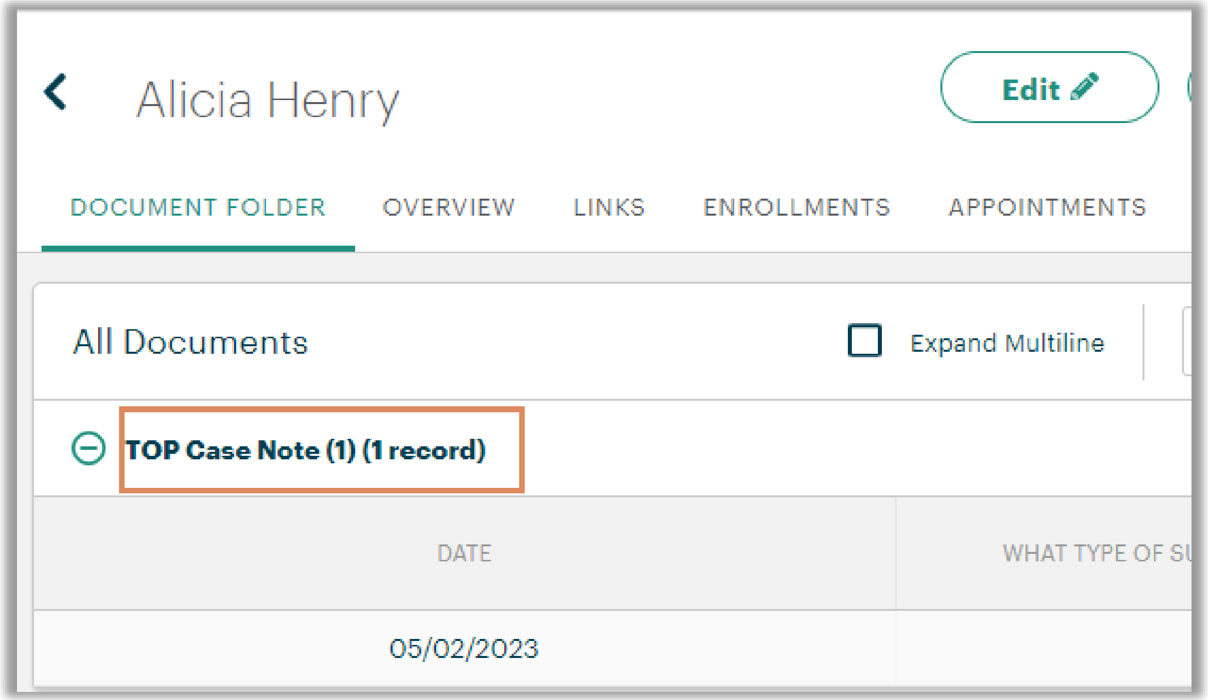
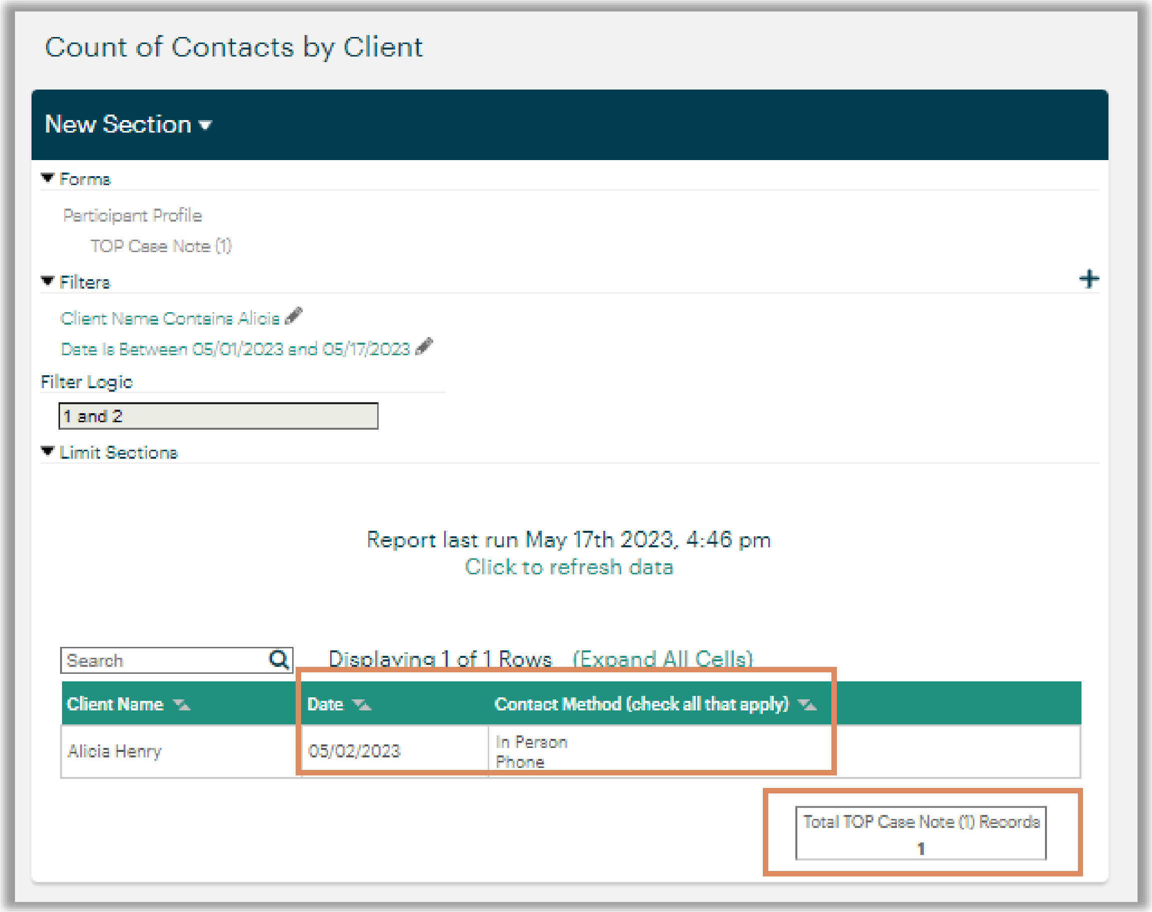
Designing Tier 2 Forms - Field Choices





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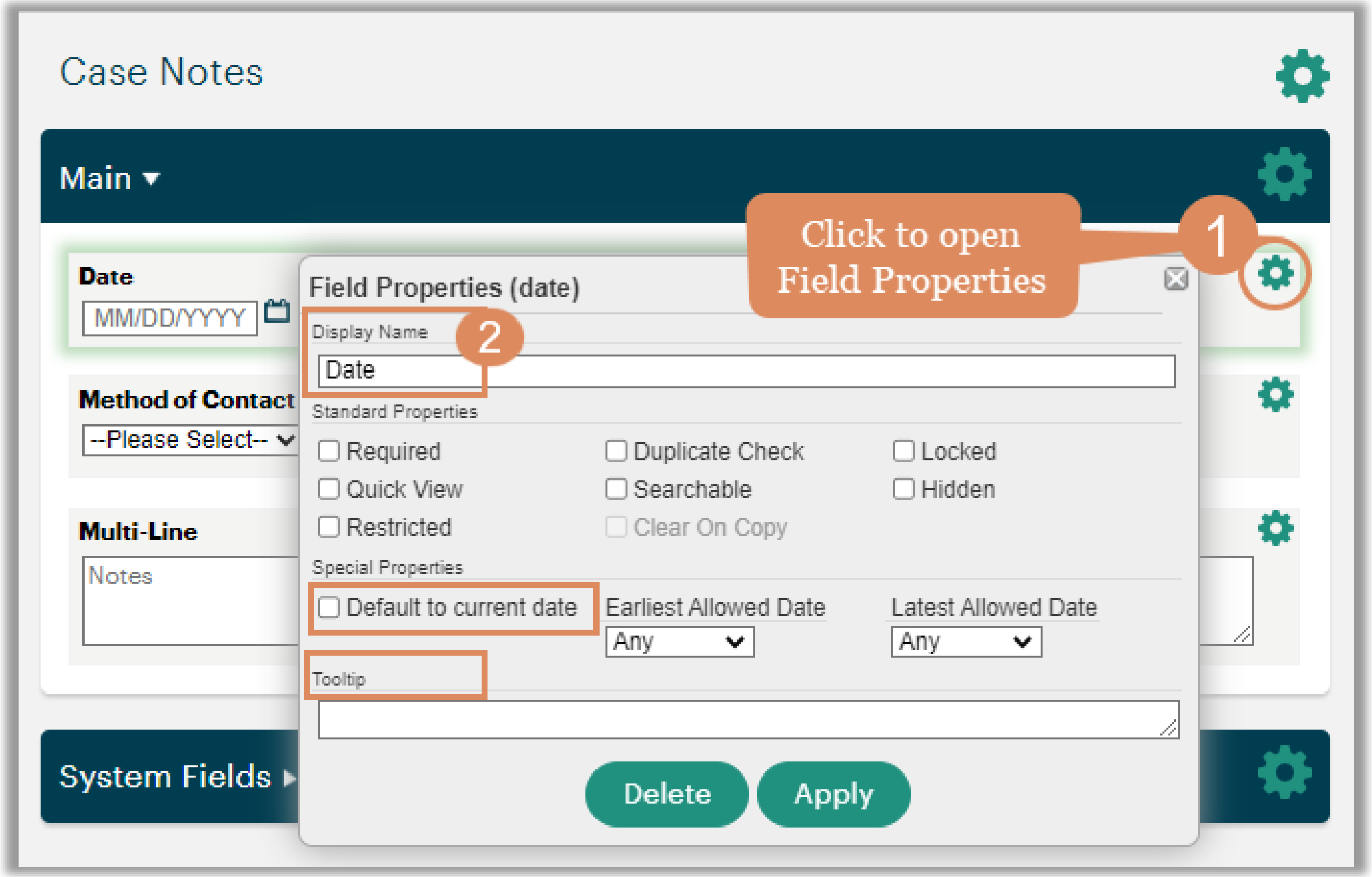
Designing Tier 2 Forms - Field Properties

Step 4: Manage Field Properties

- Change Display Name
- Change Standard Properties
- Add Tool Tip



Designing Tier 2 Forms - Field Properties

Step 4: Manage Field Properties

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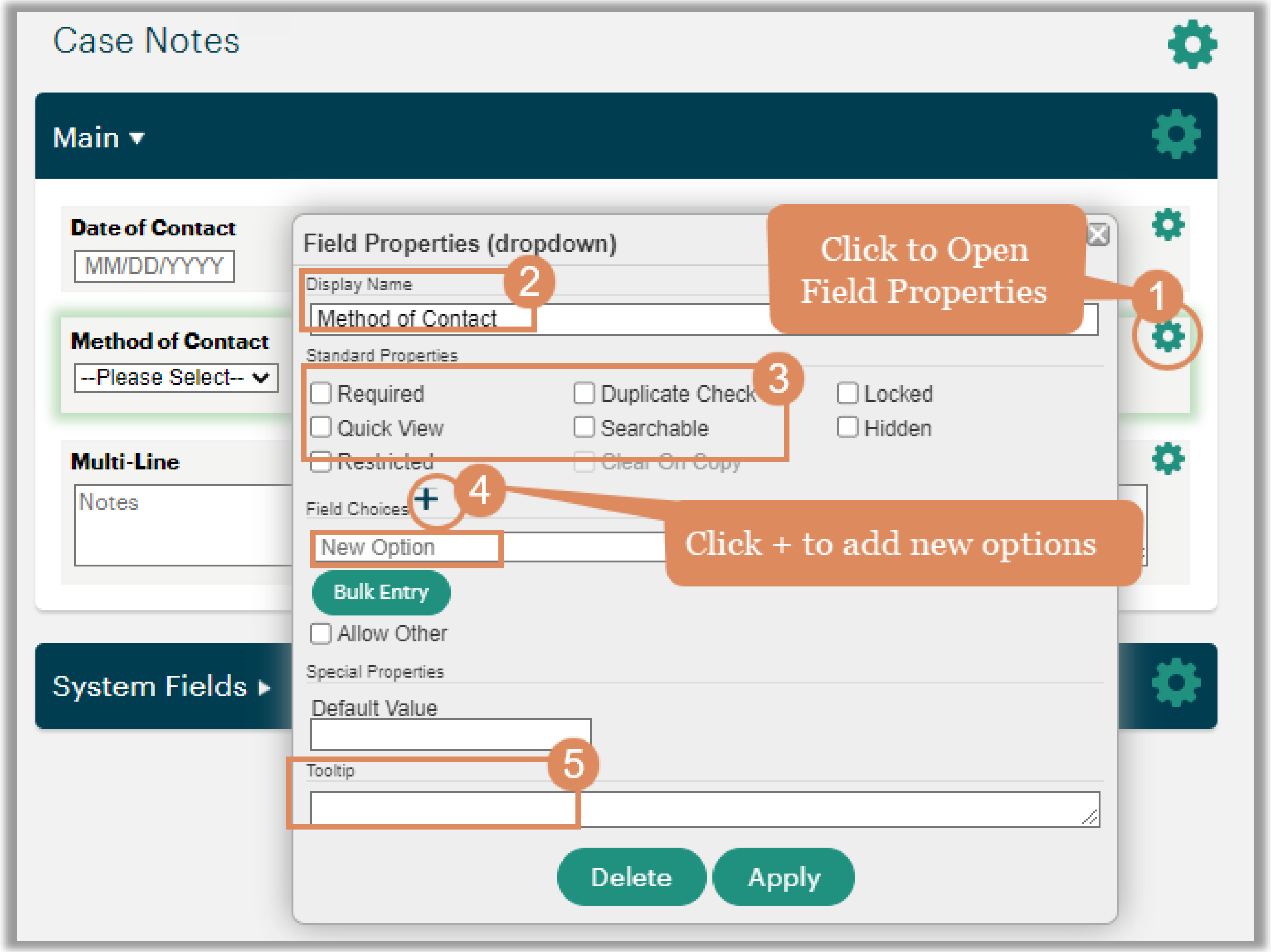
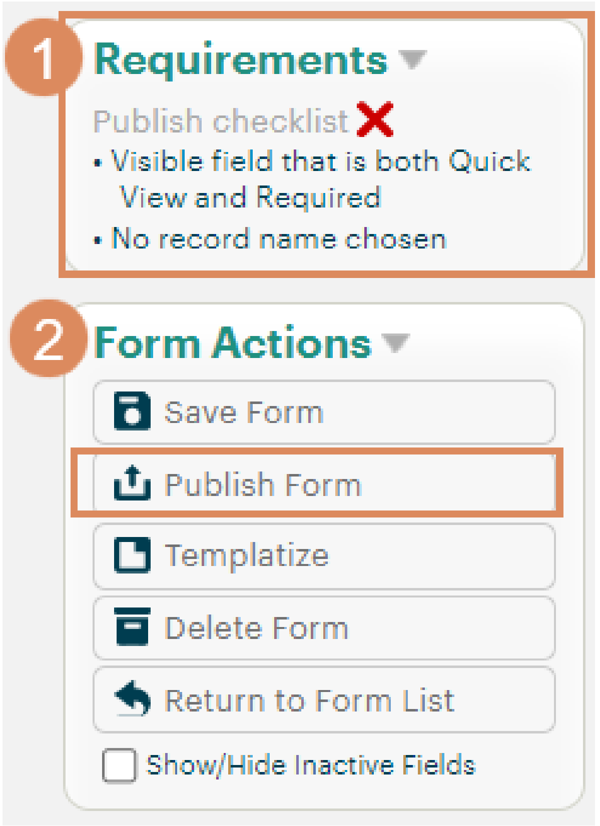


Designing Tier 2 Forms - Publishing Forms

Step 5: Publish the Form

- 1 Quick View & Required Field
- 1 Record Name Field



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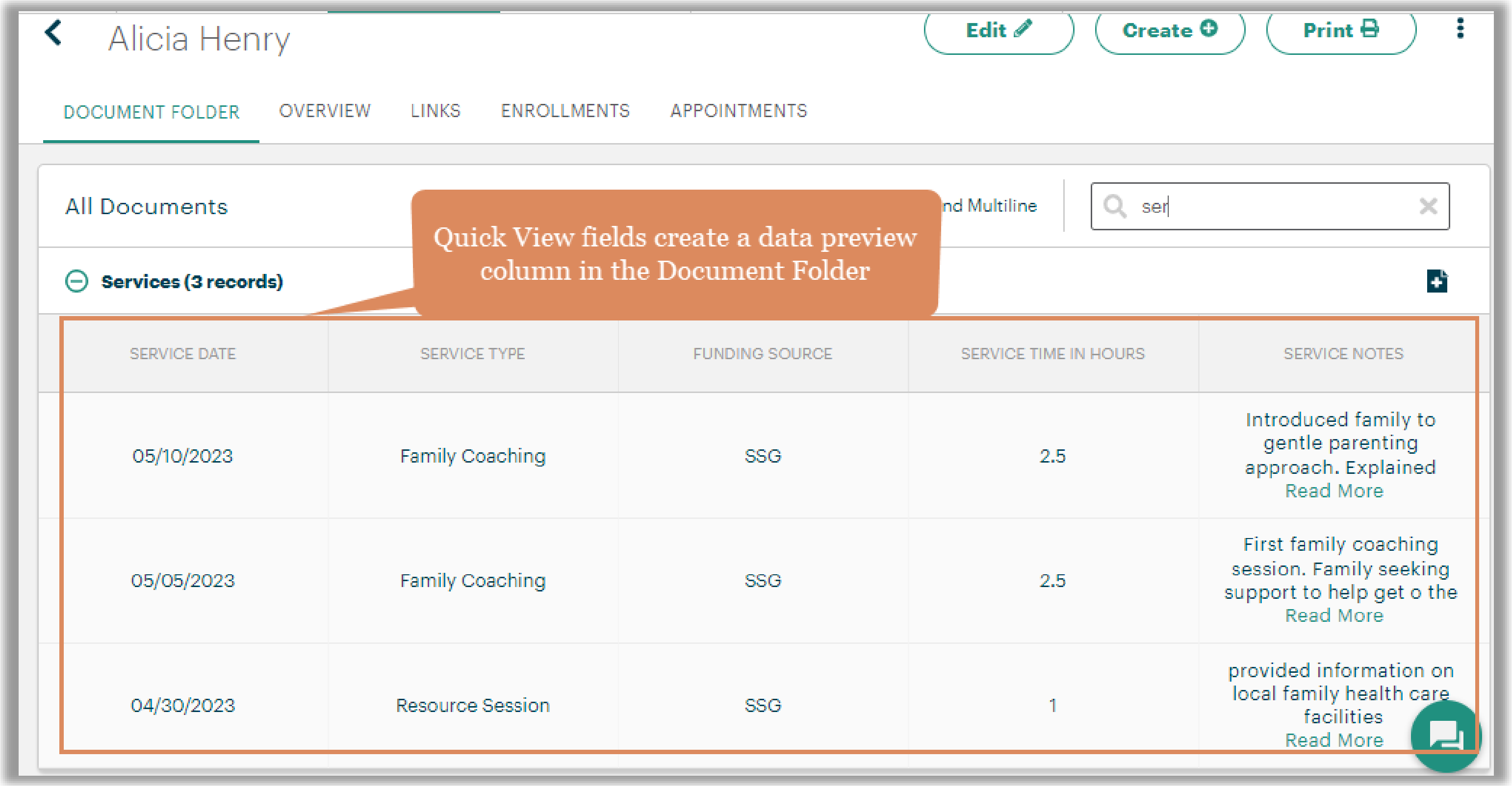
Designing Tier 2 Forms - Publishing Forms

<u>**Questions to consider :**</u>

1. What field(s) will help users when viewing record history in the Document Folder?



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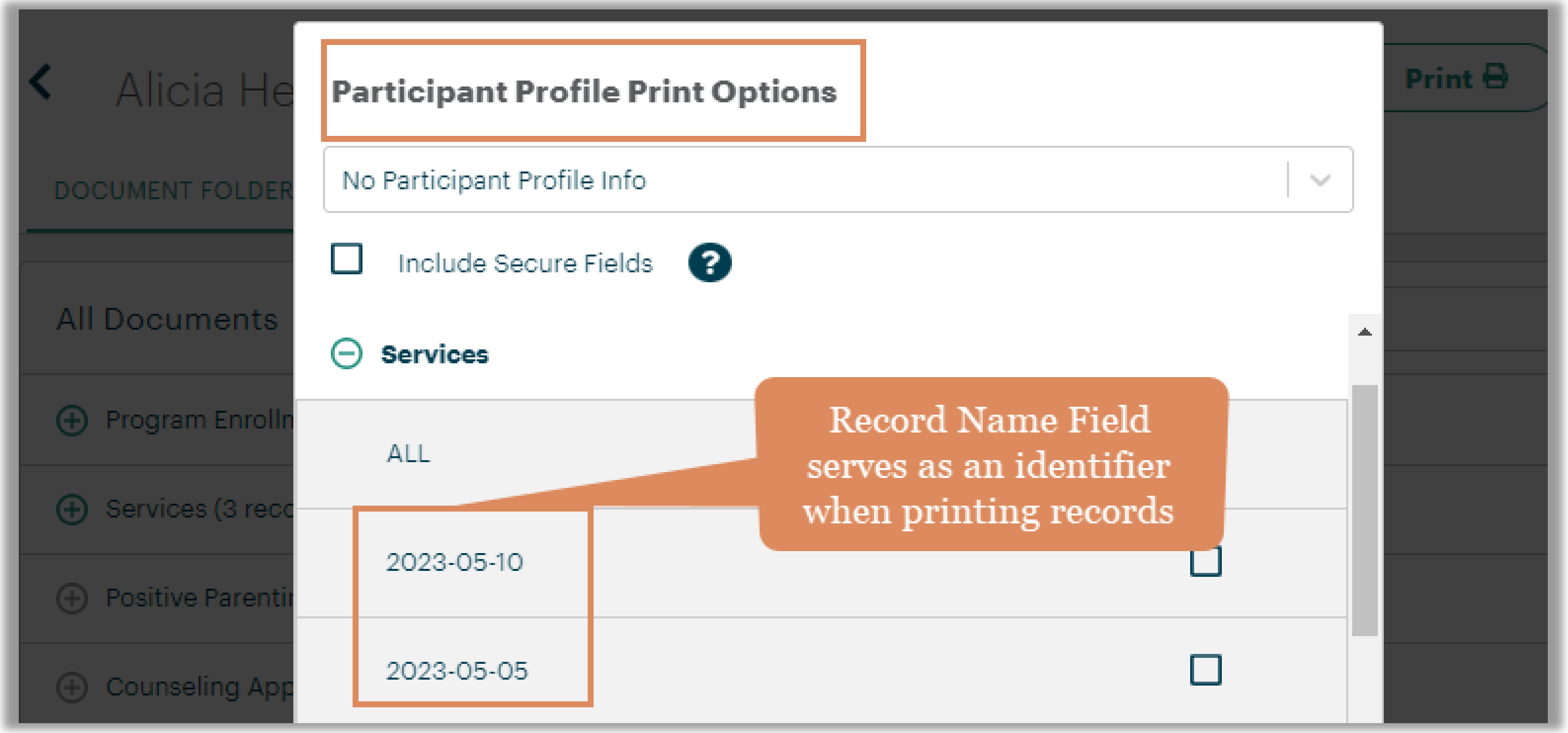
Designing Tier 2 Forms - Publishing Forms

Questions to consider :

1. What field(s) will help users when viewing record history in the Document Folder?
2. What data points might help staff identify the correct record to print?



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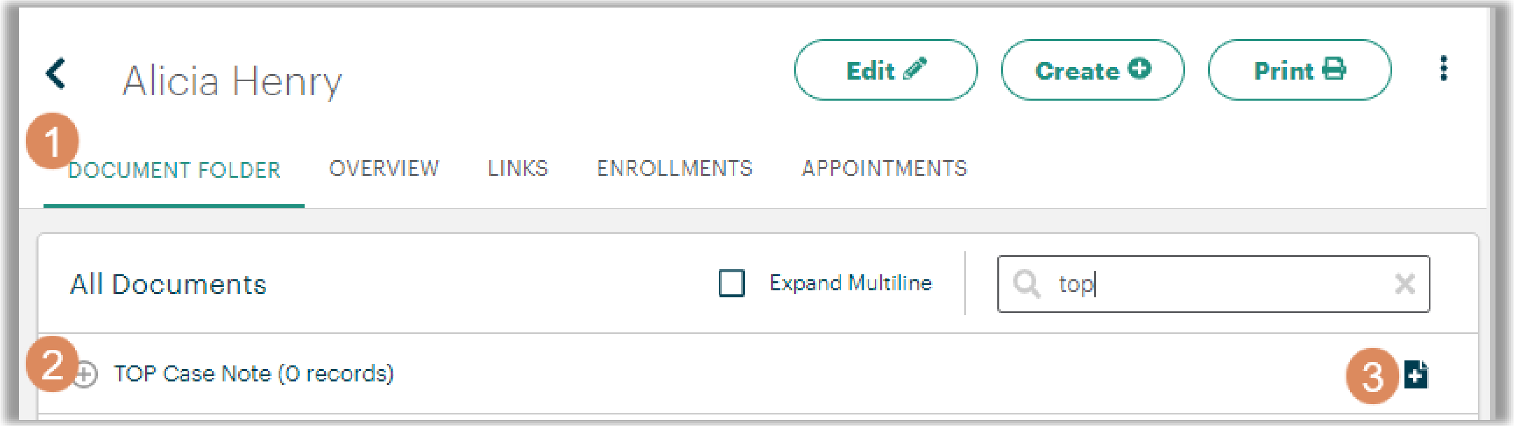
Testing Your Design

Testing Your Design

Open Data Entry Tab

Create a Fake Record



Additional Resources

Additional Training Opportunities

- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

Build confidence & knowledge in our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!

Thank you for attending!

We hope to see you
in future trainings.

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