

Apricot

Designing Forms for Tracking Services, Case Notes, Interactions

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

Purpose of Forms

Purpose of Forms

Blank Electronic Templates For Tracking:




Purpose of Forms

Blank Electronic Templates For Tracking:


- Demographics


Participant Profile

Profile Details ▾


***Participant Name** 

First Middle Last

***Date of Birth** 



Intake Date



Client Status

Active
 Inactive
 Other

How did you hear about us?

Internet
 Newspaper
 Radio
 Other

Client Phone Number

ext.

Client Email

Demographic Information ▾

Gender

▾

Race

▾

Marital Status

Ethnicity

Purpose of Forms

Blank Electronic Templates For Tracking:

- Demographics
- Outputs

Workshop Attendance

Alicia Henry

Quick View Information ▶

Attendance Sheet ▼

***Workshop Date**
 📅

Workshop Name

Parenting 101
 Interview Skills
 Resume Writing

Attendance
 ▼

Purpose of Forms

Blank Electronic Templates For Tracking:

- Demographics
- Outputs
- Outcomes

Positive Parenting Assessment

Alicia Henry

[Quick View Information](#) ▶

Main ▼

***Date of Assessment**

📅

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

Positive Verbal Discipline

Purpose of Forms

Two Types:

- Tier 1 Forms

The screenshot displays the Bonterra Administrator interface. At the top, the user is identified as 'ADMINISTRATOR' with a green underline. To the right, it shows 'All Sites' and 'Program All Programs' with a 'CHANGE' button and a pencil icon. Below this is a section titled 'Standard Forms'. A dark teal banner reads 'Select the Form You Wish to Modify Below'. A list of forms follows: 'Participant Profile' (with a green up arrow icon and a mouse cursor hovering over it), 'Household Profile' (with a pencil icon), 'Caseworker Profile' (with a pencil icon), and 'Classes Offered' (with a pencil icon).

Purpose of Forms

Two Types:

- Tier 1 Forms
- Tier 2 Forms

The screenshot displays the Administrator interface. At the top, there is a navigation bar with the role 'ADMINISTRATOR' and the site selection 'All Sites' with a 'CHANGE' button. Below this, the section is titled 'Standard Forms'. A dark blue banner instructs the user to 'Select the Form You Wish to Modify Below'. A list of forms is shown, each with a green lock icon and a right-pointing arrow. The forms are: 'Participant Profile' (with a dropdown arrow), 'Program Enrollment and Exit', 'Positive Parenting Assessment', 'Services', 'Counseling Appointment', and 'Workforce Assistance'. A large black curly brace groups the last five forms. Below the first form, it indicates 'Last Modified by: Sabrina Gilbert on 05/10/2023 3:20 PM CDT'.

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.

The screenshot displays the Bonterra Administrator interface. At the top, there is a navigation bar with 'ADMINISTRATOR' in the center, 'All Sites' on the right, and a 'CHANGE' button with a pencil icon. Below the navigation bar, the main content area is titled 'Standard Forms'. A dark blue banner with white text reads 'Select the Form You Wish to Modify Below'. Underneath, a list of forms is shown, each with a green lock icon and a right-pointing arrow. The forms are: 'Participant Profile', 'Program Enrollment and Exit', 'Positive Parenting Assessment', 'Services', 'Counseling Appointment', and 'Workforce Assistance'. A large black curly brace is drawn on the right side of the list, grouping the last five forms. Above the list, the text 'Last Modified by: Sabrina Gilbert on 05/10/2023 3:20 PM CDT' is visible.

Best Data for Tier 2 Forms

Best Data for Tier 2 Forms


- Capture Snapshot in time of interactions with a subject.

Services

Alicia Henry
[Quick View Information ▶](#)

Service Information ▼

This form should be completed when a client receives any individualized service.

***Service Date**
 

***Service Type** ▼

***Funding Source** ▼

***Service Time in Hours**

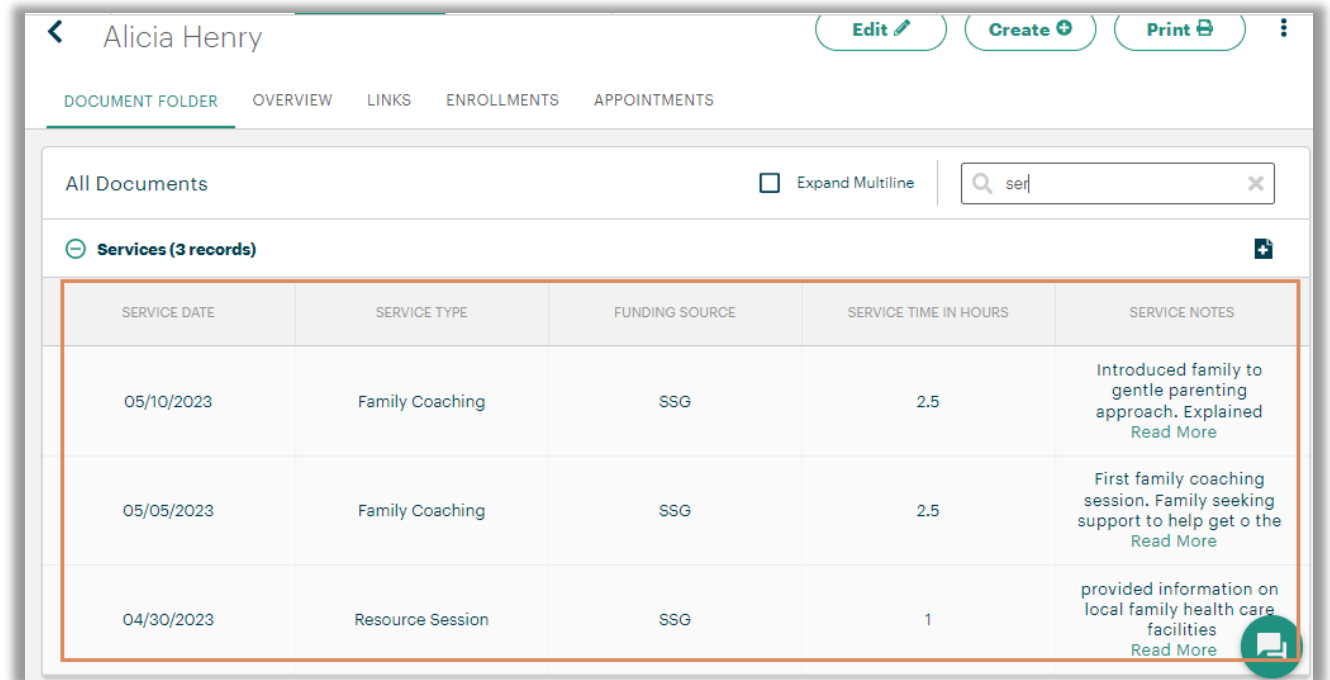
Service Notes ▼

Service Notes

Notes

Best Data for Tier 2 Forms

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

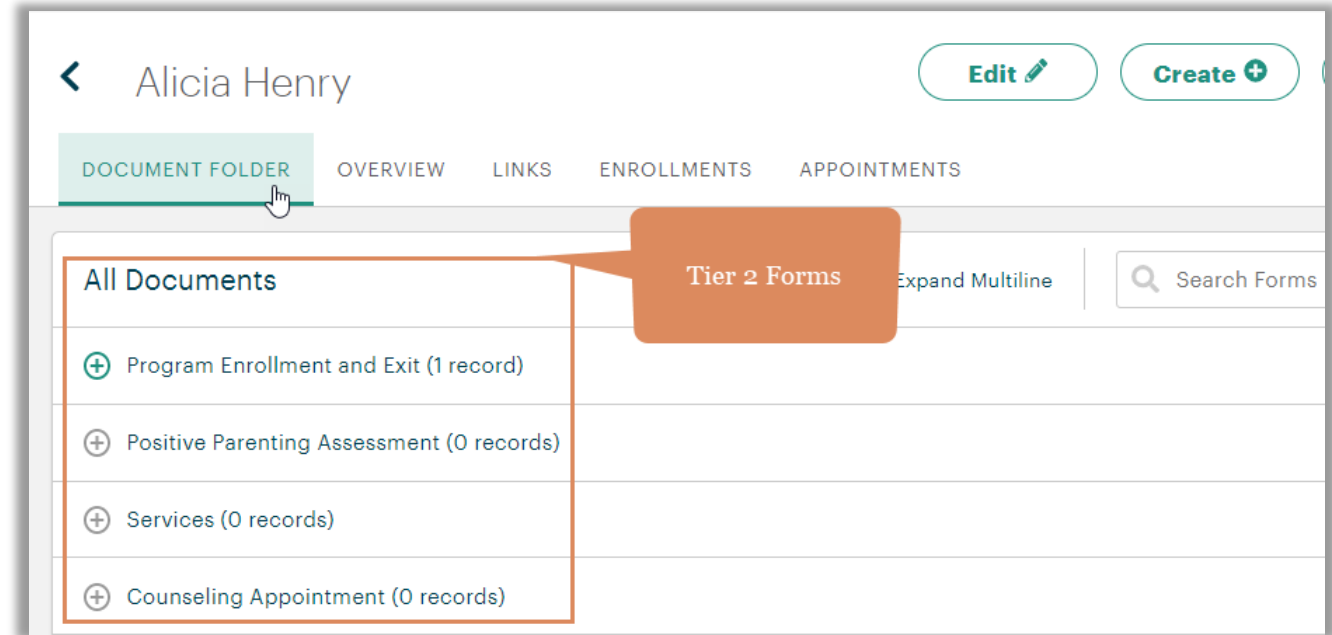


The screenshot shows a user interface for a subject named Alicia Henry. At the top, there are navigation tabs: DOCUMENT FOLDER (selected), OVERVIEW, LINKS, ENROLLMENTS, and APPOINTMENTS. To the right of the name are buttons for Edit, Create, and Print. Below the tabs, there is a section for 'All Documents' with an 'Expand Multiline' checkbox and a search bar. A section titled 'Services (3 records)' contains a table with the following data:

SERVICE DATE	SERVICE TYPE	FUNDING SOURCE	SERVICE TIME IN HOURS	SERVICE NOTES
05/10/2023	Family Coaching	SSG	2.5	Introduced family to gentle parenting approach. Explained Read More
05/05/2023	Family Coaching	SSG	2.5	First family coaching session. Family seeking support to help get o the Read More
04/30/2023	Resource Session	SSG	1	provided information on local family health care facilities Read More

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?

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?



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?

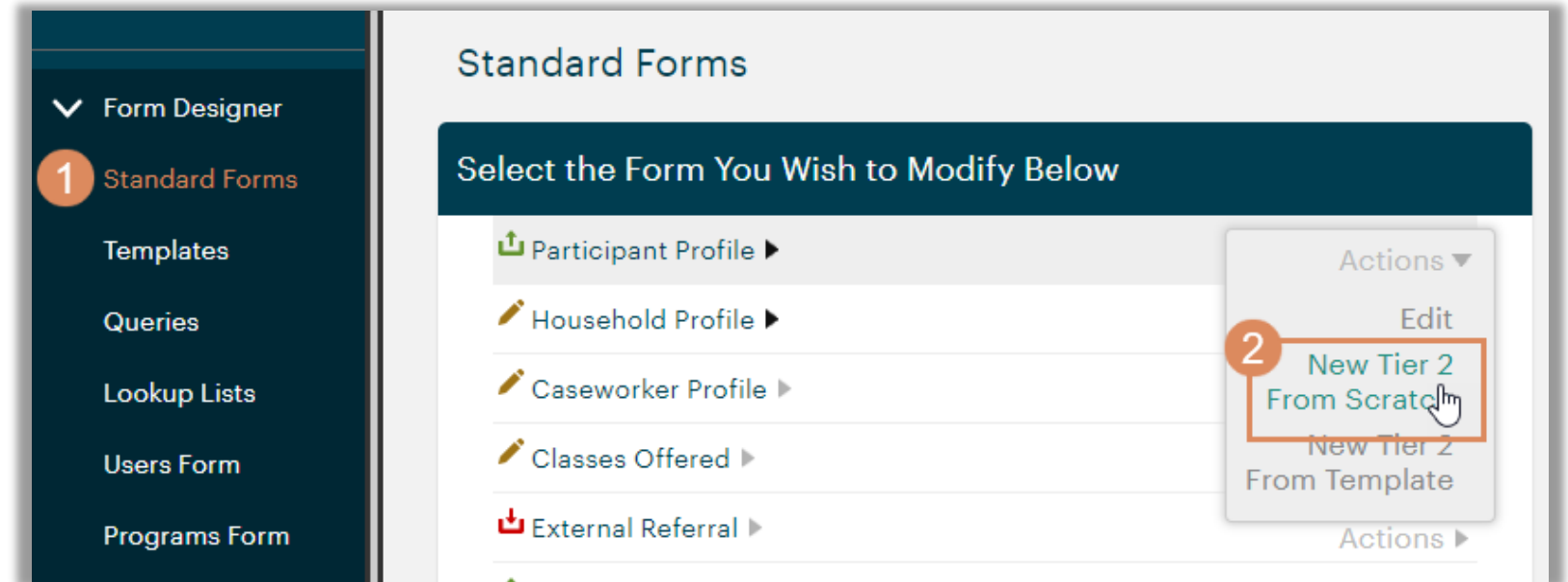
Contact Log for Case Notes & Service Coordination					
Client (Last, First, MI): Doe, John J.					
MA ID Number: 1234567890			Case Manager – Name: Sue Smith		
Agency: ABC County			Title: MSW		
Description Codes (to be used in the second column below)					
BF = Beneficiary Contact – Face to Face		CF = 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. <i>S.S., MSW</i>
Monthly Total: _____			Total Units: _____		
Signature/Title: <i>Sue Smith, MSW</i>			Date: _____ MM/DD/YY		

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

The screenshot shows a 'New Form' design interface. At the top left, it says 'New Form'. On the right, there is a 'COLLAPSE ALL' button. The main area contains two dark blue sections: 'Main' with a dropdown arrow and a gear icon, and 'System Fields' with a right-pointing arrow and a gear icon. On the right side, there are three panels: 'Field Choices' with a dropdown arrow and a list of field types (All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, Special); 'Requirements' with a dropdown arrow and a checklist (Publish checklist with a red X, Visible field that is both Quick View and Required, No record name chosen); and 'Form Actions' with a dropdown arrow and three buttons: Save Form, Publish Form, and Templatize. A green speech bubble icon is next to the Templatize button. At the bottom center, there is a logo for 'helping hands' with the tagline 'helping people in need'. The logo consists of two stylized 'H's, one blue and one green, with a white heart in the center.

Designing Tier 2 Forms – Form Properties

Step 2: Manage Form Properties

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

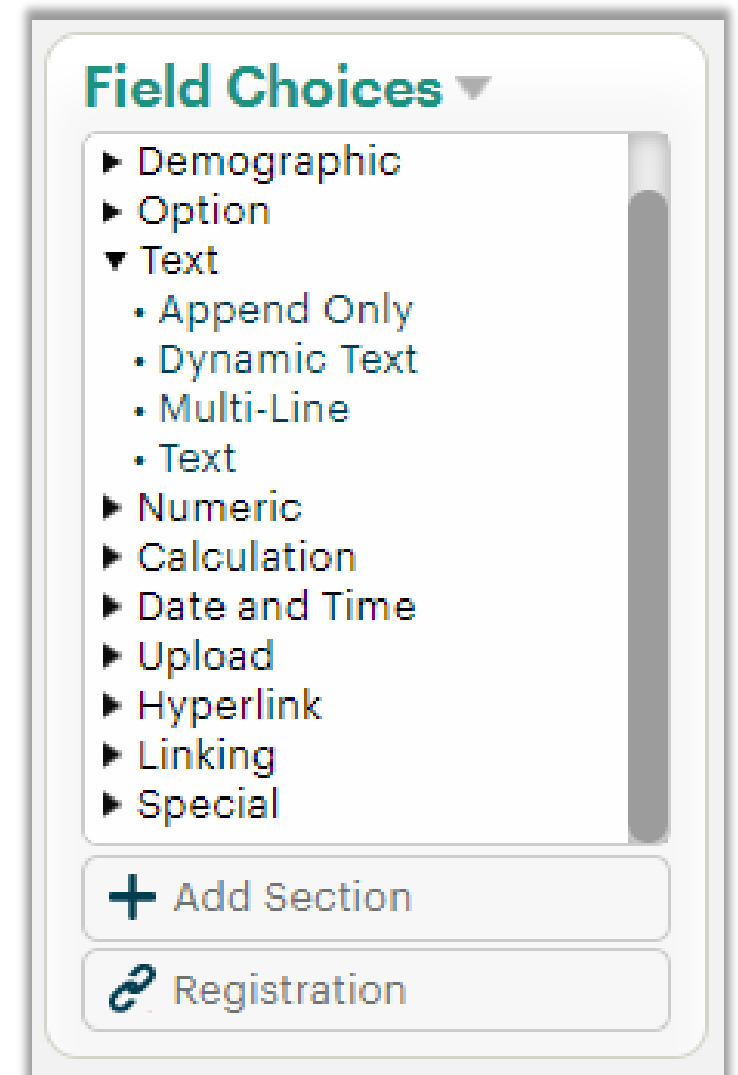
The screenshot shows the 'Form Properties (Participant Profile Tier 2)' dialog box. It contains the following fields and settings:

- Form Name:** A text input field containing 'New Form', highlighted with a red box and a '2' callout.
- Description:** A large text area, currently empty.
- Settings:** A section containing several checkboxes:
 - Allow Batch Record creation?
 - Allow Copies
 - Record Limit
 - Hide from Document Folder
 - Enable Form Logic
- Program Assignment Type:** A dropdown menu showing 'User selects program assignment', highlighted with a red box and a '3' callout.
- Record Name Field:** A dropdown menu showing '--- Please Select ---', highlighted with a red box and a '4' callout.
- Blueprint Form Tag:** A dropdown menu showing '--- Please Select ---'.
- Quick View Fields:** A section for selecting fields to display in quick view.
- Searchable Fields:** A section for selecting fields to be searchable.
- History:** A section for viewing the form's history.
- Apply:** A green button at the bottom right.

An orange callout box in the top right corner contains the text 'Click to Open Form Properties' and a gear icon, with a '1' callout pointing to it.

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

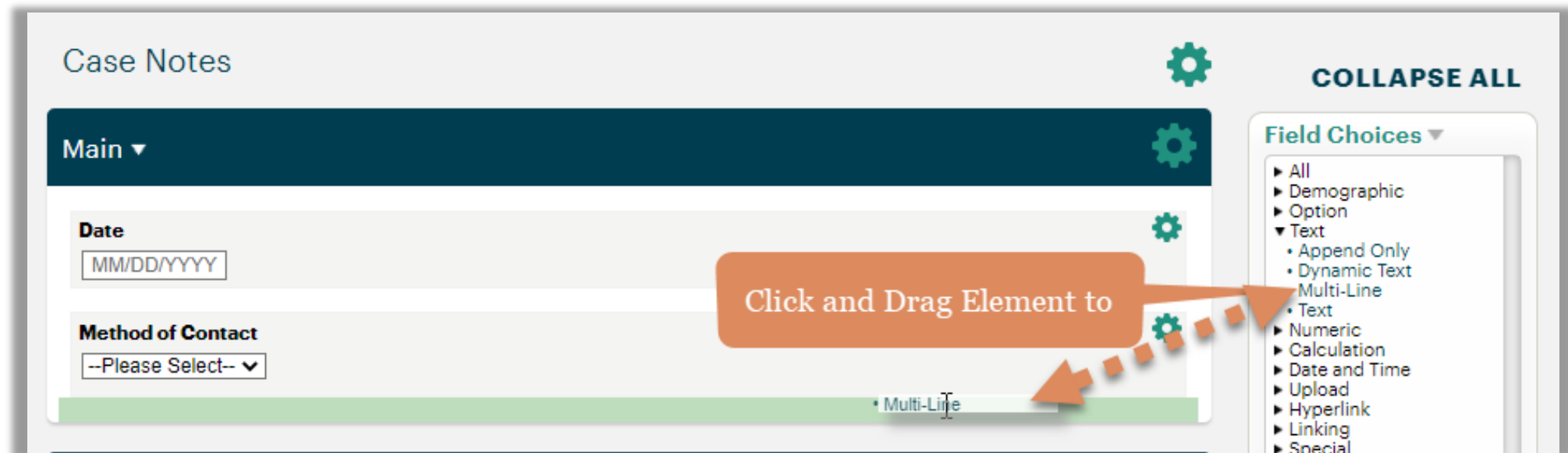


The image shows a software interface for selecting field types. At the top, there is a header 'Field Choices' with a downward-pointing triangle. Below this is a scrollable list of options, each preceded by a right-pointing triangle (▶) or a downward-pointing triangle (▼). The options are: Demographic, Option, Text (with a downward-pointing triangle), Append Only, Dynamic Text, Multi-Line, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, and Special. At the bottom of the list, there are two buttons: '+ Add Section' and a button with a chain-link icon labeled 'Registration'.

Designing Tier 2 Forms - Field Choices

Step 3: Add Field Choices:

Best Practice - Start with the END in mind.



The screenshot displays a form design interface for 'Case Notes'. The main form area contains a 'Date' field with a 'MM/DD/YYYY' mask and a 'Method of Contact' dropdown menu currently set to '--Please Select--'. A 'Field Choices' panel on the right lists various field types, including 'Text', 'Multi-Line', 'Numeric', 'Calculation', 'Date and Time', 'Upload', 'Hyperlink', 'Linking', and 'Social'. An orange callout box with the text 'Click and Drag Element to' and a dashed arrow points from the 'Multi-Line' option in the 'Field Choices' panel to a new field being added to the form.

Case Notes

COLLAPSE ALL

Main ▾

Date
MM/DD/YYYY

Method of Contact
--Please Select-- ▾

Field Choices ▾

- ▶ All
- ▶ Demographic
- ▶ Option
- ▼ Text
 - Append Only
 - Dynamic Text
 - Multi-Line
 - Text
- ▶ Numeric
- ▶ Calculation
- ▶ Date and Time
- ▶ Upload
- ▶ Hyperlink
- ▶ Linking
- ▶ Social

Click and Drag Element to

Multi-Line

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?

The screenshot displays a web form titled "TOP Case Note" for a user named "Alicia Henry". The form includes a "Main" tab and several input fields:

- *Date:** A text input field with a date mask "MM/DD/YYYY" and a calendar icon.
- *Contact Method:** A dropdown menu with "--Please Select--" as the selected option.
- *What type of support was provided to the student?:** A dropdown menu with "--Please Select--" as the selected option.
- *Start Time:** A time input field showing "5:30" and an "AM" dropdown.
- *End Time:** A time input field showing "5:30" and an "AM" dropdown.
- Time Spent:** A text input field followed by the word "minutes".
- *Parties Present:** A group of radio button options: "Parent(a)", "Teen(a)", "School Staff(a)", "Service Provider Staff(a)", and "Other".
- Name(s) of Parties Present:** A text input field with a placeholder "Name(s)".
- *Summary of Outcome:** A text input field with a placeholder "Notes".
- Created By:** A text input field with a placeholder "--".

Orange boxes highlight the "Date" field, the "Time Spent" field, and the "Parties Present" radio button group.

Designing Tier 2 Forms - Field Choices

TOP Case Note

Alicia Henry
Quick View Information ▶

Main ▾

***Date**
MM/DD/YYYY 📅

***Contact Method**
--Please Select-- ▾

***What type of support was provided to the student?**
--Please Select-- ▾

***Start Time**
5:30 AM ▾

***End Time**
5:30 AM ▾

Time Spent
 minutes

***Parties Present**

- Parent(s)
- Teen(s)
- School Staff(s)
- Service Provider Staff(s)
- Other

Name(s) of Parties Present:
Name(s) /

***Summary of Outcome**
Notes /

Created By
-

Designing Tier 2 Forms - Field Choices

TOP Case Note (1)

Alicia Henry
Quick View Information ▶

Main ▼

***Date**
05/02/2023 📅

Contact Method (check all that apply)

- In Person
- Phone
- Email
- Text
- Virtual Contact

Showing 2 Contacts on the same day

***What type of support was provided to the student?**
Case Management ▼

***Start Time**
2:30 PM ▼

***End Time**
3:45 PM ▼

Time Spent

***Parties Present**

Designing Tier 2 Forms - Field Choices

Alicia Henry Edit

DOCUMENT FOLDER OVERVIEW LINKS ENROLLMENTS APPOINTMENTS

All Documents Expand Multiline

TOP Case Note (1) (1 record)

DATE	WHAT TYPE OF SU
05/02/2023	

Count of Contacts by Client

New Section ▾

▼ Forms

Participant Profile

TOP Case Note (1)

▼ Filters +

Client Name Contains Alicia ✎

Date is Between 05/01/2023 and 05/17/2023 ✎

Filter Logic

1 and 2

▼ Limit Sections

Report last run May 17th 2023, 4:46 pm
Click to refresh data

Search Q Displaying 1 of 1 Rows (Expand All Cells)

Client Name	Date	Contact Method (check all that apply)
Alicia Henry	05/02/2023	In Person Phone

Total TOP Case Note (1) Records
1

Designing Tier 2 Forms - Field Properties

Step 4: Manage Field Properties

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

Case Notes

Main ▾

Date
MM/DD/YYYY

Method of Contact
--Please Select-- ▾

Multi-Line
Notes

Field Properties (date)

Display Name: Date

Standard Properties

- Required
- Duplicate Check
- Locked
- Quick View
- Searchable
- Hidden
- Restricted
- Clear On Copy

Special Properties

- Default to current date
- Earliest Allowed Date: Any ▾
- Latest Allowed Date: Any ▾

Tooltip

Delete Apply

Click to open Field Properties

1

2

1

Designing Tier 2 Forms - Field Properties

Step 4: Manage Field Properties

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

Case Notes

Main ▾

Date of Contact
MM/DD/YYYY

Method of Contact
--Please Select-- ▾

Multi-Line
Notes

Field Properties (dropdown)

Display Name
Method of Contact

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable Hidden
 Restricted Clear On Copy

Field Choices +
New Option

Bulk Entry

Allow Other

Special Properties

Default Value

Tooltip

Delete Apply

Click to Open Field Properties

Click + to add new options

Designing Tier 2 Forms - Publishing Forms

Step 5: Publish the Form

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

The screenshot displays a user interface for publishing a form, divided into two main sections:

- 1 Requirements**: This section contains a "Publish checklist" with a red 'X' icon, indicating a failure. The checklist items are:
 - Visible field that is both Quick View and Required
 - No record name chosen
- 2 Form Actions**: This section contains a list of buttons for managing the form:
 - Save Form
 - Publish Form** (highlighted with an orange border)
 - Templatize
 - Delete Form
 - Return to Form List
 - Show/Hide Inactive Fields

Designing Tier 2 Forms - Publishing Forms

Questions to consider :

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

The screenshot shows a user record for Alicia Henry. At the top, there are navigation tabs: DOCUMENT FOLDER, OVERVIEW, LINKS, ENROLLMENTS, and APPOINTMENTS. Below the tabs is a search bar with the text 'ser'. A callout box points to a table of services, stating: 'Quick View fields create a data preview column in the Document Folder'. The table has the following data:

SERVICE DATE	SERVICE TYPE	FUNDING SOURCE	SERVICE TIME IN HOURS	SERVICE NOTES
05/10/2023	Family Coaching	SSG	2.5	Introduced family to gentle parenting approach. Explained Read More
05/05/2023	Family Coaching	SSG	2.5	First family coaching session. Family seeking support to help get o the Read More
04/30/2023	Resource Session	SSG	1	provided information on local family health care facilities Read More

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?

Participant Profile Print Options

No Participant Profile Info

Include Secure Fields ?

Services

ALL	
2023-05-10	<input type="checkbox"/>
2023-05-05	<input type="checkbox"/>

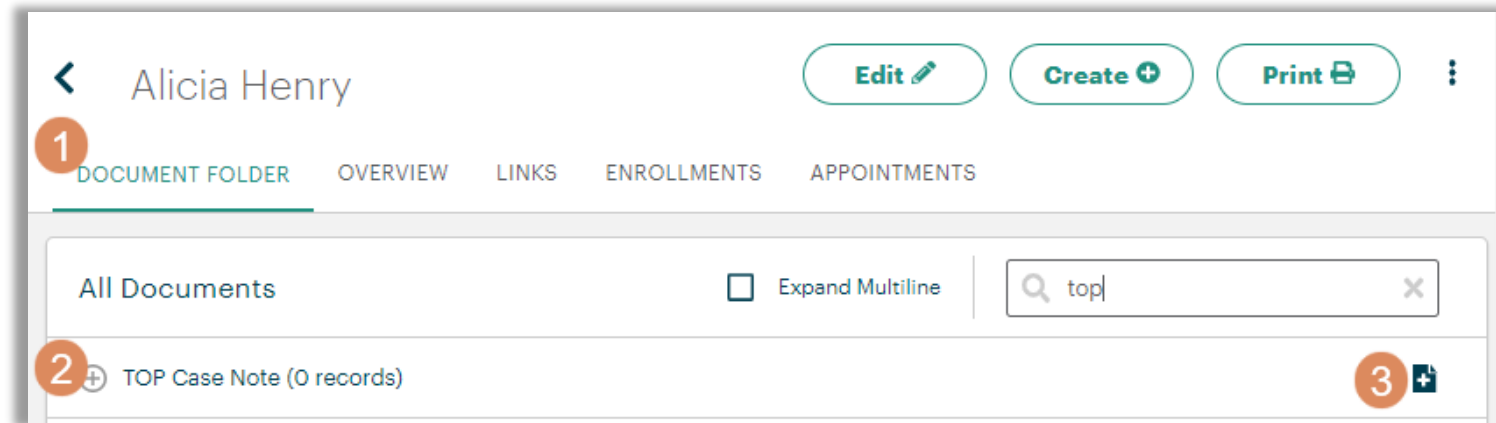
Record Name Field serves as an identifier when printing records

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.