

Apricot

Designing A Profile Form

Meet Your Trainer

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Learning Objective

Review best practices for designing Tier 1 Forms in Apricot so that Administrators can make informed decisions when creating new forms from scratch.

Agenda

Purpose of Forms

Intention of Tier 1 Forms

Design Best Practices

Testing Your Design

Purpose of Forms


Purpose of Forms


Blank Electronic Templates For Tracking:



- Demographics

Participant Profile

Profile Details ▾

***Participant Name** 
First Middle Last

Intake Date
 

***Date of Birth** 
 

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

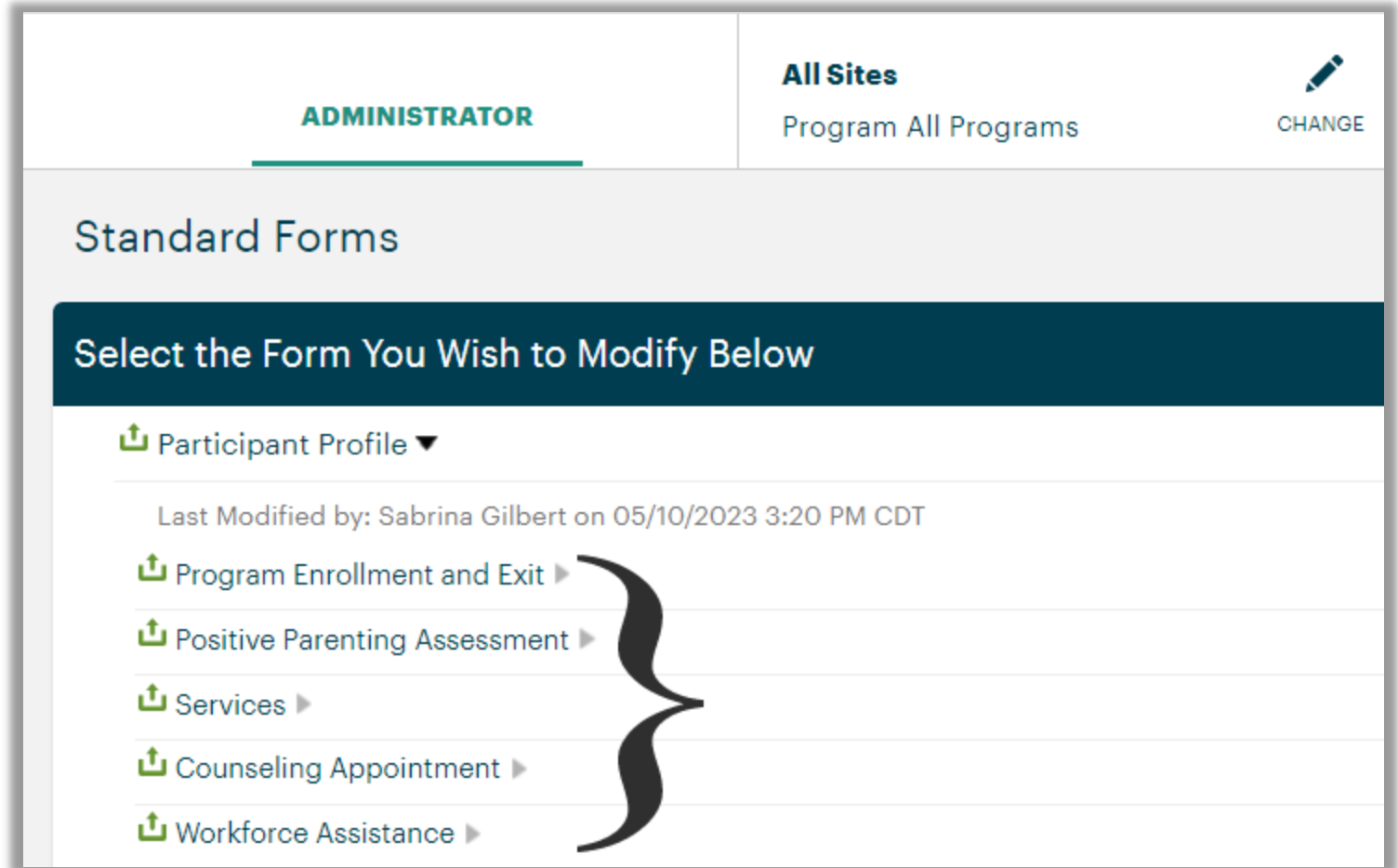
The screenshot displays the Bonterra Administrator interface. At the top, the user is identified as 'ADMINISTRATOR' with the role 'All Sites' and 'Program All Programs'. A 'CHANGE' button with a pencil icon is visible in the top right corner. Below this, the 'Standard Forms' section is highlighted. A dark teal banner reads 'Select the Form You Wish to Modify Below'. A list of forms follows, each with a pencil icon and a right-pointing arrow:

- Participant Profile ▶ (highlighted with a mouse cursor)
- Household Profile ▶
- Caseworker Profile ▶
- Classes Offered ▶

Purpose of Forms

Two Types:

- Tier 1 Forms
- Tier 2 Forms



The screenshot displays the Bonterra 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 page is titled "Standard Forms" and contains a dark blue banner that reads "Select the Form You Wish to Modify Below". A list of forms follows, each with a green lock icon and a right-pointing arrow:

- Participant Profile ▾
- Program Enrollment and Exit ▶
- Positive Parenting Assessment ▶
- Services ▶
- Counseling Appointment ▶
- Workforce Assistance ▶

Below the "Participant Profile" item, a text line indicates "Last Modified by: Sabrina Gilbert on 05/10/2023 3:20 PM CDT". A large black curly brace is drawn on the right side of the list, grouping the last five items: "Program Enrollment and Exit", "Positive Parenting Assessment", "Services", "Counseling Appointment", and "Workforce Assistance".

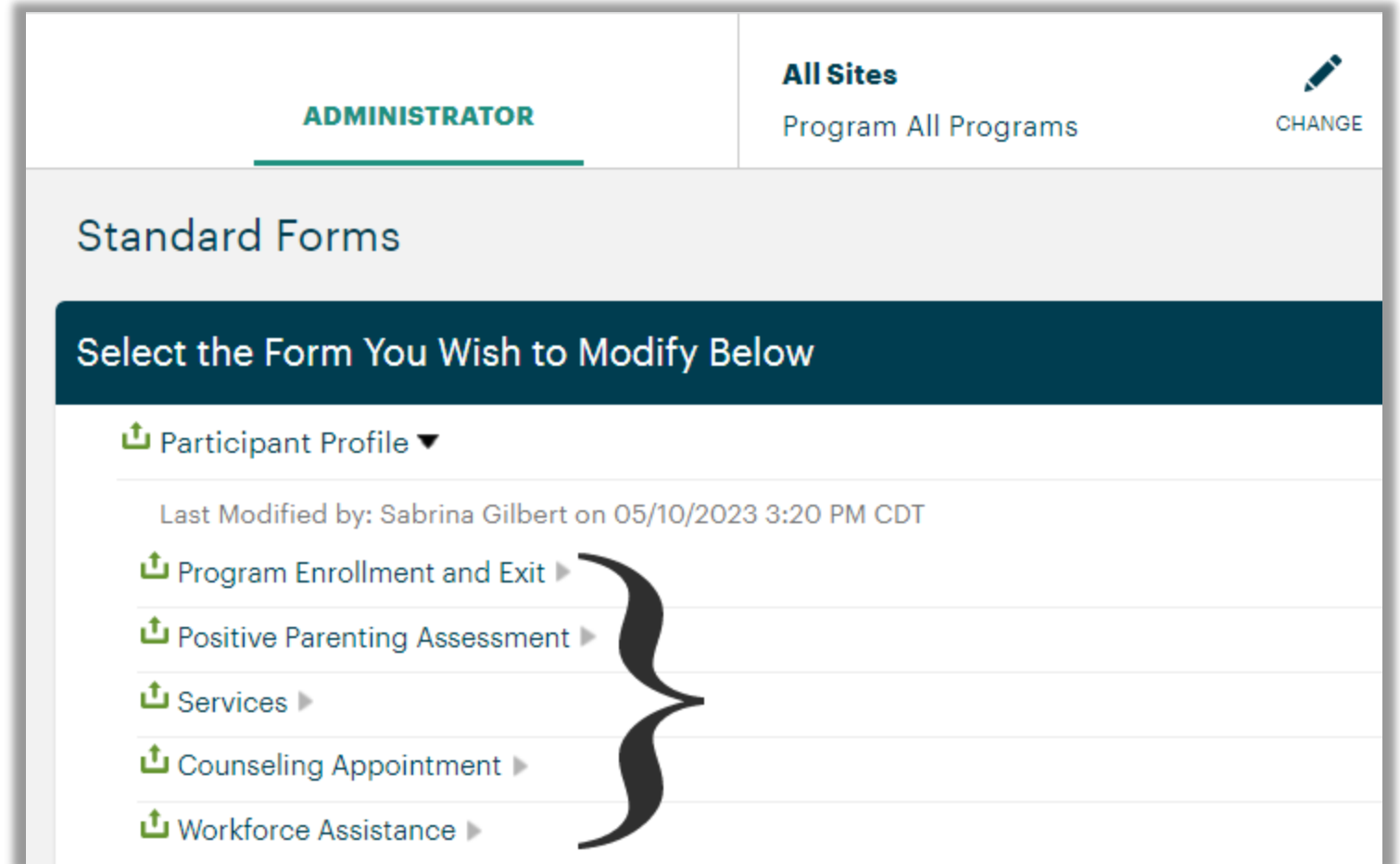
Purpose of Forms

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, the user is identified as 'ADMINISTRATOR' and is viewing 'All Sites' for 'Program All Programs'. A 'CHANGE' button with a pencil icon is visible. Below this, the section is titled 'Standard Forms'. A dark teal banner instructs the user to 'Select the Form You Wish to Modify Below'. A list of forms follows, each with a green lock icon and a right-pointing arrow:

- Participant Profile ▼
- Program Enrollment and Exit ▶
- Positive Parenting Assessment ▶
- Services ▶
- Counseling Appointment ▶
- Workforce Assistance ▶

Below the first form, it notes 'Last Modified by: Sabrina Gilbert on 05/10/2023 3:20 PM CDT'. A large black curly bracket on the right side of the list groups the last five forms (Program Enrollment and Exit through Workforce Assistance).


Intention of Tier 1 Forms


Intention of Tier 1 Forms




- Track data not expected to change as a result of services.

Participant Profile

Profile Details ▾

***Participant Name** 
First Middle Last

Intake Date
 

***Date of Birth** 
  

Client Status

Active
 Inactive
 Other

How did you hear about us?



Internet
 Newspaper
 Radio
 Other

Client Phone Number
 ext.

Client Email

Demographic Information ▾

Gender

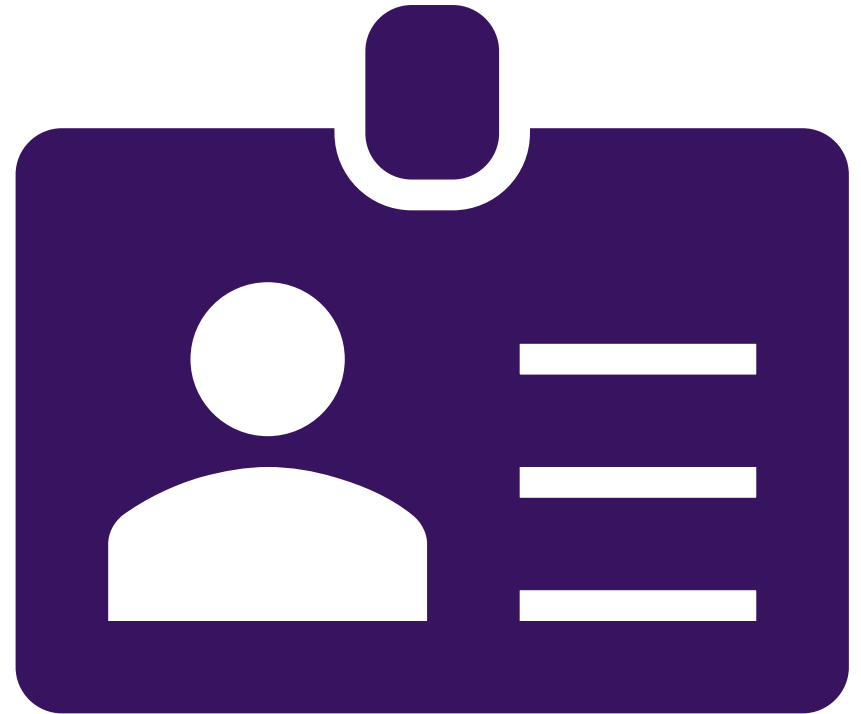
Race
  

Marital Status

Ethnicity

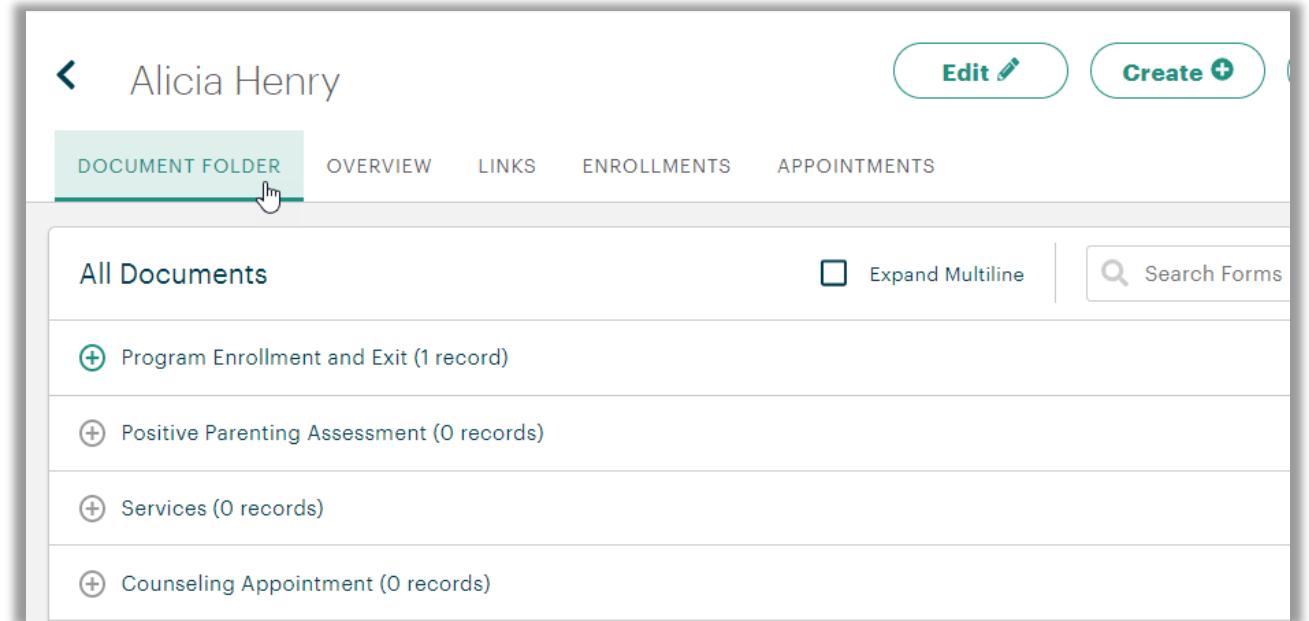
Intention of Tier 1 Forms

- Track data not expected to change as a result of services.
- Establishes identity of a subject.



Intention of Tier 1 Forms

- Track data not expected to change as a result of services.
- Establishes identity of a subject.
- Each subject will have only one Tier 1 Record.
- Creates the Document Folder.



Should it be a Tier 1 or Tier 2 Form?

Good questions to ask when deciding:

1. Will data entered here be used to help identify individuals?
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 Incoming Referrals be best tracked as a Tier 1 or Tier 2 Form?

Answer the via Poll.

Good questions to ask when deciding:

1. Will data entered here be used to help identify individuals?
2. Will the data tracked via this form be used to measure change over time?

REFERRING AGENCY		
AGENCY	PHONE	
LOCATION	EMAIL	
FORM COMPLETED BY	PHONE	DATE

RECEIVING AGENCY	
AGENCY	PHONE
LOCATION	EMAIL

CLIENT INFORMATION	
LAST NAME	FIRST NAME AND MI
DATE OF BIRTH	FEMALE / MALE
INTERPRETER REQUIRED?	LANGUAGE REQUIRED
GUARDIAN NAME	GUARDIAN RELATIONSHIP
PATIENT'S ADDRESS	CELL PHONE
	HOME PHONE
	WORK PHONE
	EMAIL
REFERRAL DIAGNOSIS	ICD-9

SERVICE REQUESTED	
REASON FOR REFERRAL	
PATIENT AWARE OF REASON FOR REFERRAL? IF NOT, PLEASE EXPLAIN.	
SERVICE / SPECIALTY REQUESTED	

Design Best Practices

Designing Tier 1 Forms

Steps:

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

The screenshot displays the 'Form Designer' interface. On the left, a dark sidebar contains a menu with 'Form Designer' at the top, followed by 'Standard Forms' (highlighted with an orange circle containing the number '1'), 'Templates', 'Queries', 'Lookup Lists', 'Users Form', 'Programs Form', and 'Edit Templates'. The main content area is titled 'Standard Forms' and features a dark teal header with the text 'Select the Form You Wish to Modify Below'. Below this header is a list of five forms, each with an icon and an 'Actions' button: 'Participant Profile' (pencil icon), 'Household Profile' (upward arrow icon), 'Caseworker Profile' (upward arrow icon), 'Classes Offered' (pencil icon), and 'External Referral' (downward arrow icon). On the right side, there are two panels. The top panel is titled 'EXPAND ALL' and contains 'Form Actions' with two options: 'Tier 1 From Scratch' (highlighted with an orange circle containing the number '2') and 'Tier 1 From Template'. The bottom panel is titled 'Form List Filters' and includes radio buttons for 'All' (selected), 'Published', 'Modified', and 'Unpublished', along with a checkbox for 'Show/Hide Inactive Forms'. A note at the bottom of this panel states: 'You can only sort Forms when all Forms are visible.'

Designing Tier 1 Forms

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

The screenshot displays the 'New Form (1)' interface. The main area contains two sections: 'Main' and 'System Fields', each with a gear icon for configuration. On the right, there are three panels: 'Field Choices' with a list of field types (All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, Special), 'Requirements' with a checklist (Publish checklist, A Duplicate Check field, A Searchable field, Visible field that is both Quick View and Required, No record name chosen), and 'Form Actions' with buttons for 'Save Form' and 'Publish Form'. A 'COLLAPSE ALL' button is located at the top right. Numbered callouts 1 through 4 highlight the gear icons, the Field Choices panel, the Requirements panel, and the Form Actions panel respectively.

Designing Tier 1 Forms – Form Properties

Step 2: Manage Form Properties

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

The screenshot shows the 'Form Properties (Tier 1)' dialog box with the following elements and callouts:

- 1**: A gear icon in the top right corner of the dialog box.
- 2**: A callout box pointing to the 'Form Name' field, which contains the text 'New Form (1)'.
- 3**: A callout box pointing to the 'Program Assignment Type' dropdown menu, which is set to 'User selects program assignment'.
- 4**: A callout box pointing to the 'Record Name Field' dropdown menu, which is set to '--- Please Select ---'.

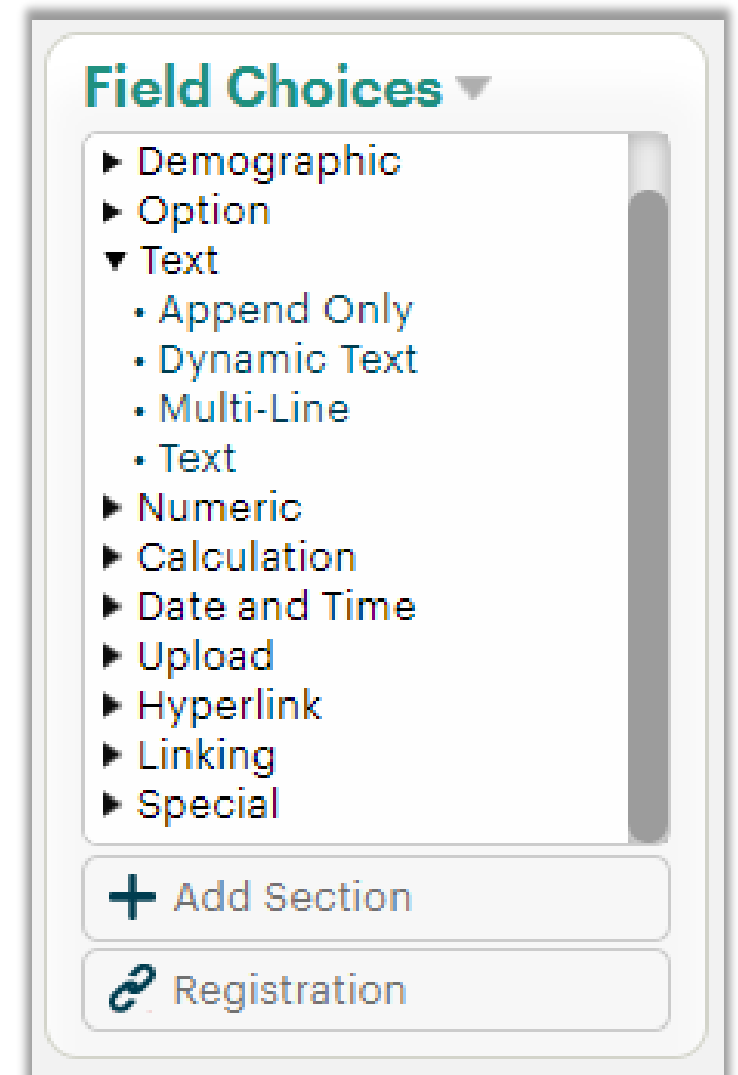
An orange callout box in the top right corner contains the text: 'Click to open Form properties'.

The dialog box includes the following sections:

- Form Name**: Text input field containing 'New Form (1)'.
- Description**: Text area.
- Settings**:
 - Hide from Navigation Menu
 - Allow Copies
 - Enable Form Logic
- Program Assignment Type**: Dropdown menu with 'User selects program assignment' selected.
- Record Name Field**: Dropdown menu with '--- Please Select ---' selected.
- Blueprint Form Tag**: Dropdown menu with '--- Please Select ---' selected.
- Quick View Fields** and **Searchable Fields**: Empty sections.
- History**: Empty section.
- Apply**: Green button at the bottom.

Designing Tier 1 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 field types, each preceded by a right-pointing triangle (▶) or a downward-pointing triangle (▼) to indicate expandability. The list includes: Demographic, Option, Text (expanded to show Append Only, Dynamic Text, Multi-Line, and 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 1 Forms - Field Choices

Step 3: Add Field Choices:

Best Practice - Start with the END in mind.

The screenshot displays a form design interface for 'Incoming Referrals'. The form is divided into sections: 'Main' (containing 'Name' and 'Phone' fields) and 'System Fields'. The 'Name' section has three input fields labeled 'First', 'Middle', and 'Last'. The 'Phone' section has one input field. A green bar at the bottom of the form is labeled 'Email'. On the right side, there is a 'Field Choices' panel with a 'COLLAPSE ALL' button. The 'Field Choices' panel lists various field types: All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Email, Website, Linking, and Special. Below the list are buttons for '+ Add Section' and 'Registration'. An orange callout box with the text 'Click & Drag element to desired position' has two arrows: one pointing to the 'Email' option in the 'Field Choices' list and another pointing to the 'Email' field in the form.


Designing Tier 1 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?


Participant Profile

Profile Details ▾

***Participant Name** 

First Middle Last

***Date of Birth** 

MM/DD/YYYY 

Client Status

Active


Inactive

Other

Client Phone Number

ext.

Intake Date

MM/DD/YYYY 

How did you hear about us?

Internet

Newspaper

Radio

Other

Client Email

Demographic Information ▾

Gender

--Please Select-- ▾


Race

--Please Select-- ▾

Designing Tier 1 Forms - Field Choices


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

Client Phone Number

ext.

How did you hear about us?

Internet

Newspaper

Radio

Other

Client Email

Demographic Information ▾

Gender

--Please Select-- ▾

Race

--Please Select-- ▾

Designing Tier 1 Forms - Field Choices

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

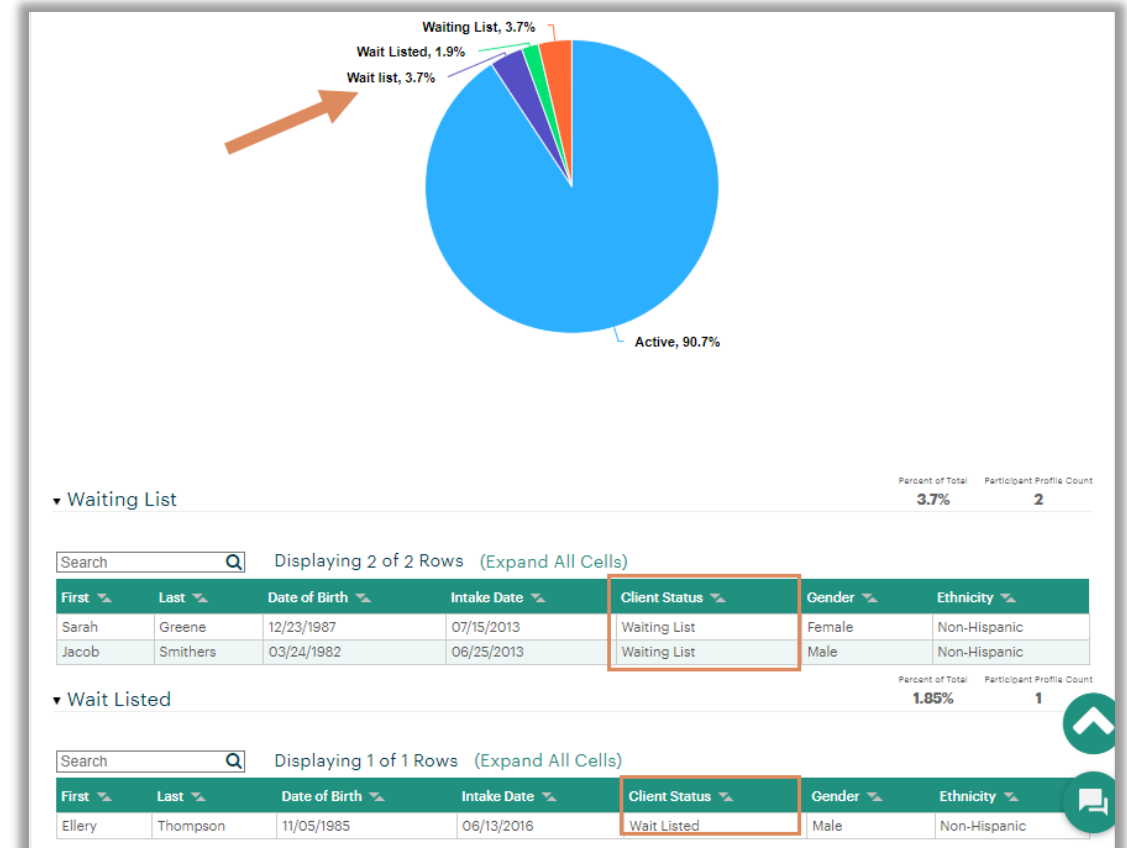
Demographic Information ▾

Gender

--Please Select-- ▾

Race

--Please Select-- ▾



Designing Tier 1 Forms - Field Properties

Step 4: Manage Field Properties

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

Incoming Referrals

Main ▾

Name

First Middle Last

Date

MM/DD/YYYY

Phone

System Fields ▶

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 Latest Allowed Date

Any Any

Tooltip

Delete Apply

Click to Manage Field Properties

Designing Tier 1 Forms - Adding New Sections

Repeat steps 3 and 4 as needed.

Note: Adding Sections can help organize similar data points

The screenshot displays a form design interface for 'Incoming Referrals'. The main form area is divided into sections. The top section, labeled 'Main', contains fields for 'Name' (First, Middle, Last), 'Date of Birth' (MM/DD/YYYY), 'Phone', and 'Email' (customer_care@apricot.info). Below this is a 'New Section' being added, indicated by a red box and a '2' in a red circle. To the right, a 'Field Choices' panel is visible, listing various field types: All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, and Special. A red box and a '1' in a red circle highlight the '+ Add Section' button in this panel. Below the 'Field Choices' panel is a 'Requirements' section with a checklist: 'Publish checklist' (marked with a red X), 'A Duplicate Check field', and 'A Searchable field'.

Designing Tier 1 Forms - Publishing Forms

Step 5: Publish the Form

- 1 Duplicate Check Field
- 1 Searchable Field
- 1 Quick View & Required Field
- 1 Record Name Field

The screenshot displays a user interface for form design. It features two main sections: 'Requirements' and 'Form Actions'. The 'Requirements' section is highlighted with a red border and a red circle containing the number '1'. It lists four requirements: 'Publish checklist' (marked with a red 'X'), 'A Duplicate Check field', 'A Searchable field', and 'Visible field that is both Quick View and Required'. The 'Form Actions' section is also highlighted with a red border and a red circle containing the number '2'. It contains six buttons: 'Save Form', 'Publish Form', 'Templatize', 'Delete Form', 'Return to Form List', and 'Show/Hide Inactive Fields'. The 'Publish Form' button is the focus of the second highlight.

Requirements ▼ 1

Publish checklist ✖

- A Duplicate Check field
- A Searchable field
- Visible field that is both Quick View and Required
- No record name chosen

Form Actions ▼ 2

- Save Form
- Publish Form
- Templatize
- Delete Form
- Return to Form List
- Show/Hide Inactive Fields


Designing Tier 1 Forms - Publishing Forms

Duplicate Check Best Practice


- 2 – 3 fields max
- Name and DOB common
- Duplicate Check requires exact match on all fields referenced


Participant Profile

Profile Details ▾

***Participant Name** 

First Middle Last

***Date of Birth** 

MM/DD/YYYY 

Client Status

Active

Inactive


Other

Other Value

Client Phone Number

ext.

Intake Date

MM/DD/YYYY 

How did you hear about us?

Internet

Newspaper

Radio

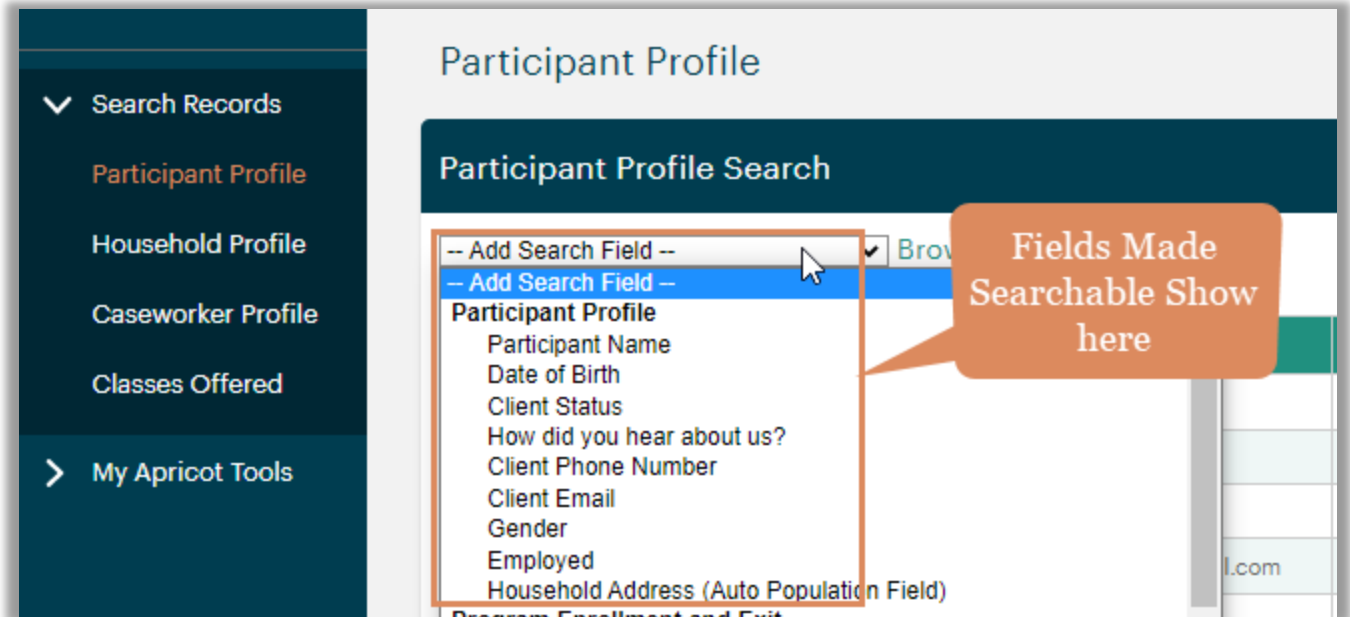
Other

Client Email

Designing Tier 1 Forms - Publishing Forms

Questions to consider :

1. What field will help users search for existing records for this form?



Designing Tier 1 Forms - Publishing Forms

Questions to consider :

1. What field will help users search for existing records for this form?
2. What data points might be helpful for staff to see in search results?

Participant Profile

Participant Profile Search

-- Add Search Field -- [Browse All](#)

Showing 1 - 20 of 54 available Participant Profile records [More Columns...](#)

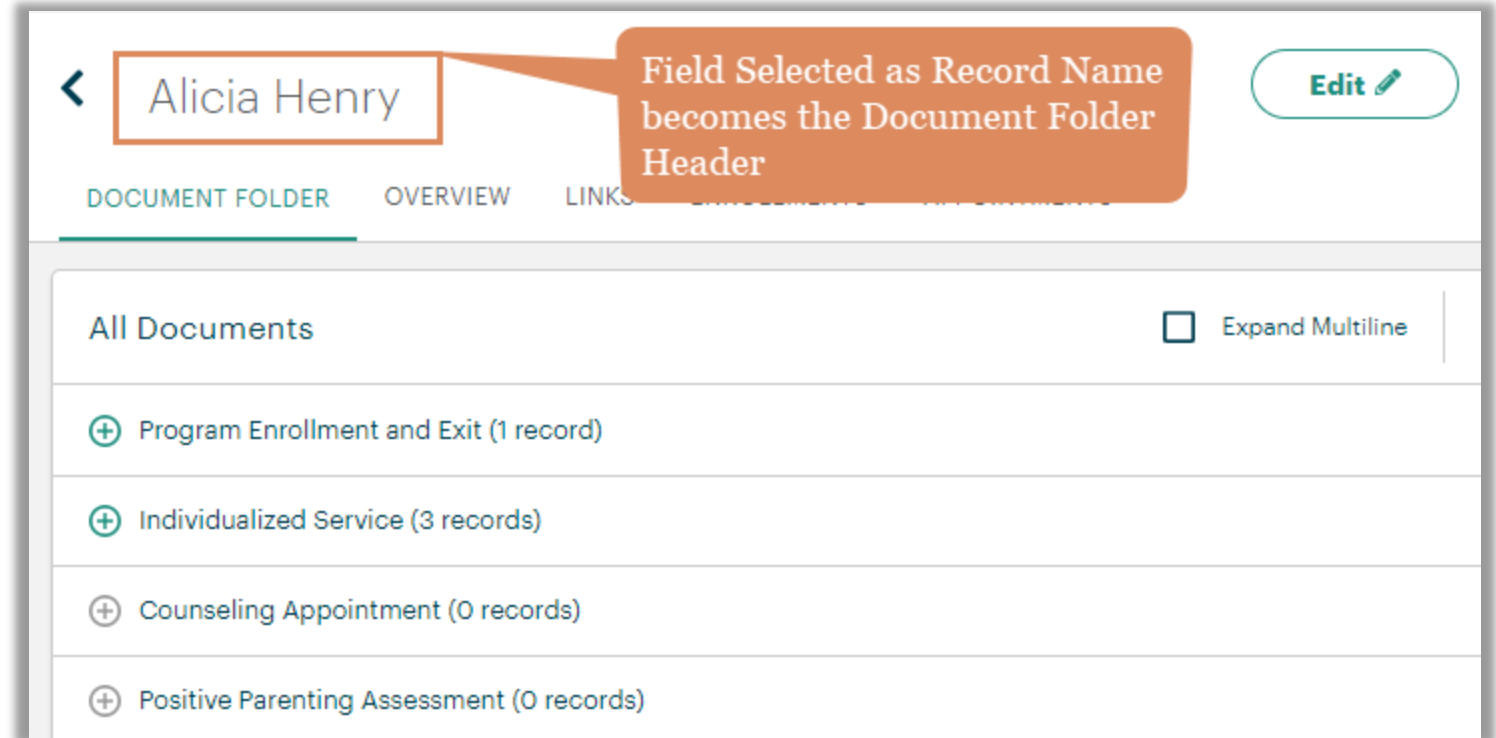
Fields set as Quick View show as a column in the Record Search

Participant Name	Date Of Birth	Client Status	Client Email	Gender	Employed
Alicia Henry	08/19/1965	Active		Female	Yes
Alonzo LaBarca	04/03/1998	Active		Male	
Alonzo LaBatsille	03/04/1998	Active		Male	No
Alvy Singer	10/01/1978	Active	alvy.singer@gmail.com	Male	Yes

Designing Tier 1 Forms - Publishing Forms

Questions to consider :

1. What field will help users search for existing records for this form?
2. What data points might be helpful for staff to see in search results?
3. What data point will be a good label header for the document folder?



The screenshot displays a user interface for a document folder. At the top, a search bar contains the name 'Alicia Henry', which is highlighted by an orange callout box stating 'Field Selected as Record Name becomes the Document Folder Header'. To the right of the search bar is an 'Edit' button with a pencil icon. Below the search bar, there are three tabs: 'DOCUMENT FOLDER' (selected), 'OVERVIEW', and 'LINKS'. The main content area shows a list of documents under the heading 'All Documents'. On the right side of this heading is a checkbox labeled 'Expand Multiline'. The list contains four items, each with a plus icon and a record count:

- Program Enrollment and Exit (1 record)
- Individualized Service (3 records)
- Counseling Appointment (0 records)
- Positive Parenting Assessment (0 records)

Testing Your Design

Testing Your Design

Open Data Entry Tab

Create a Fake Record

The screenshot shows a web application interface for 'Participant Profile'. On the left is a dark sidebar with a list of navigation items: 'Search Records', 'Participant Profile' (highlighted with an orange circle and the number '1'), 'Household Profile', 'Caseworker Profile', and 'Classes Offered'. The main content area is titled 'Participant Profile' and contains a 'Participant Profile Search' section. This section has a search bar with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' button. Below the search bar, it says 'Showing 1 - 20 of 54 available Participant Profile records' and a 'More Columns...' link. A table with columns 'Participant Name', 'Date Of Birth', 'Client Status', 'Client Email', 'Gender', and 'Em' is visible, with the first row containing 'Alicia Henry', '08/19/1965', 'Active', and 'Female'. On the right side of the interface, there is an 'EXPAND ALL' button and a 'Search Actions' dropdown menu. The first item in the 'Search Actions' menu is 'New Participant Profile', which is highlighted with an orange circle and the number '2'. Other items in the menu include 'Clear Search History', 'Program Access', 'Merge Folders', 'Create Referral', and 'Show Enrollment Actions'.

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.