



Form Builder

Bruno Bernard April 2017

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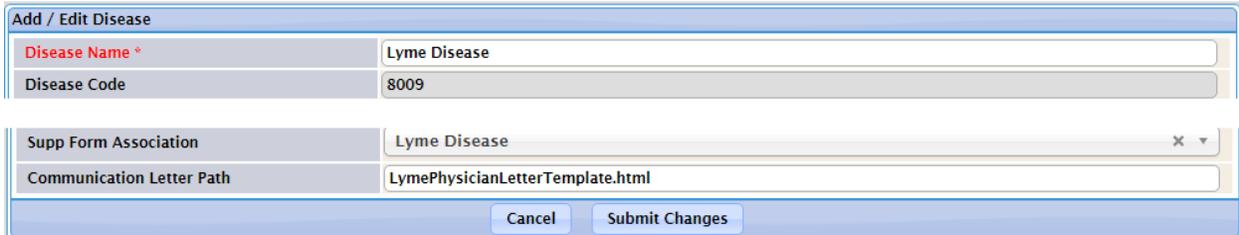
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1 Current Functionality (CDC Form)

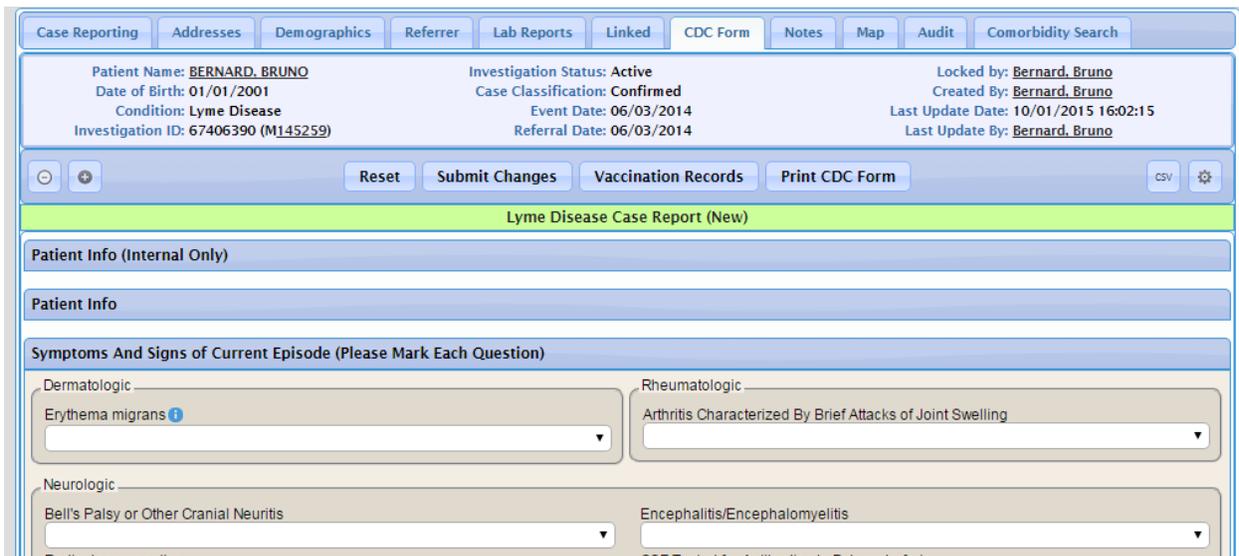
Currently, Sentinel has a preset number of Forms (CDC Forms). They can be associated to a disease through the disease code management. For example, the Lyme Disease CDC Form is associated with Lyme Disease:



Add / Edit Disease	
Disease Name *	Lyme Disease
Disease Code	8009
Supp Form Association	Lyme Disease
Communication Letter Path	LymePhysicianLetterTemplate.html
<input type="button" value="Cancel"/> <input type="button" value="Submit Changes"/>	

When the Supplemental Form (Supp Form) association is done, any user that can edit a Lyme Disease Condition can do the following:

1.1 Access and edit the Form from CDC Form Tab



Case Reporting | Addresses | Demographics | Referrer | Lab Reports | Linked | **CDC Form** | Notes | Map | Audit | Comorbidity Search

Patient Name: BERNARD, BRUNO Investigation Status: Active Locked by: Bernard, Bruno
 Date of Birth: 01/01/2001 Case Classification: Confirmed Created By: Bernard, Bruno
 Condition: Lyme Disease Event Date: 06/03/2014 Last Update Date: 10/01/2015 16:02:15
 Investigation ID: 67406390 (M145259) Referral Date: 06/03/2014 Last Update By: Bernard, Bruno

Lyme Disease Case Report (New)

Patient Info (Internal Only)

Patient Info

Symptoms And Signs of Current Episode (Please Mark Each Question)

Dermatologic Erythema migrans	Rheumatologic Arthritis Characterized By Brief Attacks of Joint Swelling
Neurologic Bell's Palsy or Other Cranial Neuritis	Encephalitis/Encephalomyelitis

1.2 Print the Form from the CDC Form Tab

Case Reporting	Addresses	Demographics	Referrer	Lab Reports	Linked	CDC Form	Notes	Map	Audit	Comorbidity Search
Patient Name: BERNARD, BRUNO Date of Birth: 01/01/2001 Condition: Lyme Disease Investigation ID: 67406390 (M145259)			Investigation Status: Active Case Classification: Confirmed Event Date: 06/03/2014 Referral Date: 06/03/2014			Locked by: Bernard, Bruno Created By: Bernard, Bruno Last Update Date: 10/01/2015 16:02:15 Last Update By: Bernard, Bruno				
Reset			Submit Changes			Vaccination Records			Print CDC Form	

The following pop up window will appear:

Lyme Disease Case Report Print - Google Chrome

tomcat.bruno.infinity.nu:8086/sentinel/CdcFormPrint.do?type=CDC_FORM_LYME_DISEASE

Send to Printer | Close the Window

Lyme Disease Case Report (New)

Patient Info (Internal Only)

Patient Info

State: **New Hampshire** County: **HILLSBOROUGH** Zip: **03101**

Age: **13 Years** Sex: **Male** Patient Ethnicity: **Unknown** Patient Race:

White American Indian or Alaskan Native Hawaiian or Other Pacific
 Asian Black or African American Islander Unknown

Symptoms And Signs of Current Episode (Please Mark Each Question)

Dermatologic: Erythema migrans Rheumatologic: Arthritis Characterized by Brief Attacks of Joint Swelling

Neurologic:

Note: You can collapse the section and it will not be included in the print out.

Print Overview:

Lyme Disease Case Report Print - Google Chrome

tomcat.bruno.infinity.nu:8086/sentinel/CdcFormPrint.do?type=CDC_FORM_LYME_DISEASE

Print

Total: 2 pages

Save Cancel

Destination: Save as PDF Change...

Pages: All e.g. 1-5, 8, 11-13

Layout: Portrait

Paper size: Letter

Margins: Default

Options: Headers and footers Background graphics

Lyme Disease Case Report (Print)

Patient Info

State: **New Hampshire** County: **HILLSBOROUGH** Zip: **03101**

Age: **13 Years** Sex: **Male** Patient Ethnicity: **Unknown** Patient Race:

White American Indian or Alaskan Native Hawaiian or Other Pacific
 Asian Black or African American Islander Unknown

Symptoms And Signs of Current Episode (Please Mark Each Question)

Dermatologic: Erythema migrans Rheumatologic: Arthritis Characterized by Brief Attacks of Joint Swelling

Neurologic:

Other History

Use the following information for the Current Episode:

Address: State:

Use the Patient Progress of the Site of Infection:

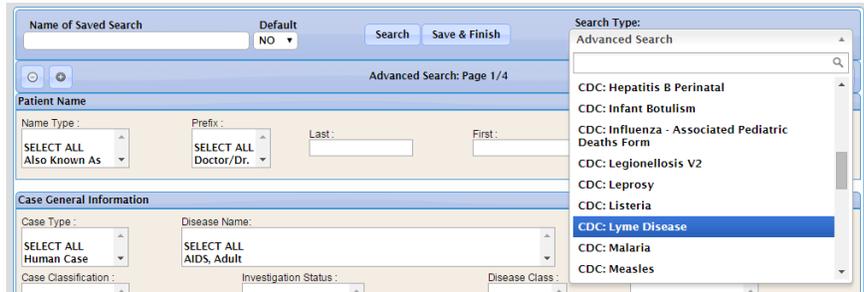
Use the Patient Progress of the Site of Infection:

When was the patient most likely exposed? State:

Event:

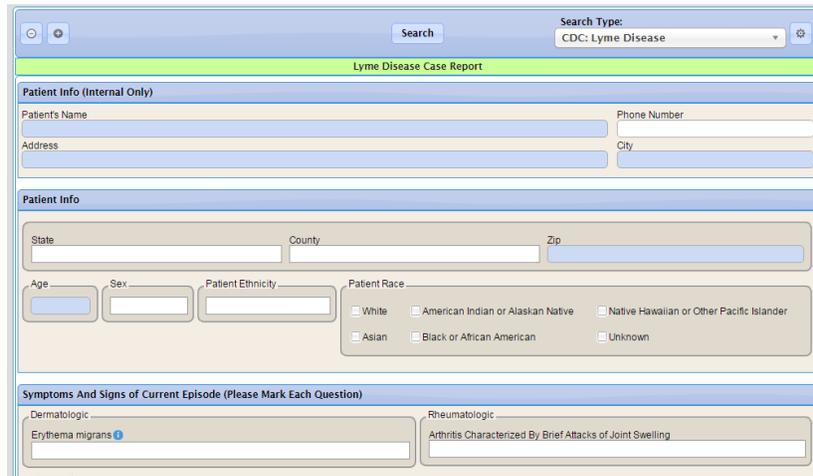
1.3 Search for information entered in the CDC Forms

To search for information entered in the CDC Forms, return to the case listing page and click on Advanced Search.



The screenshot shows the 'Advanced Search' window. At the top, there are fields for 'Name of Saved Search' and 'Default' (set to 'NO'), along with 'Search' and 'Save & Finish' buttons. Below this is a section for 'Patient Name' with dropdowns for 'Name Type' (set to 'SELECT ALL Also Known As') and 'Prefix' (set to 'SELECT ALL Doctor/Dr.'). There are also text boxes for 'Last' and 'First'. The 'Case General Information' section includes dropdowns for 'Case Type' (set to 'SELECT ALL Human Case') and 'Disease Name' (set to 'SELECT ALL AIDS, Adult'). A search dropdown menu is open on the right, listing various CDC forms: Hepatitis B Perinatal, Infant Botulism, Influenza - Associated Pediatric Deaths Form, Legionellosis V2, Leprosy, Listeria, Lyme Disease (highlighted), Malaria, and Measles.

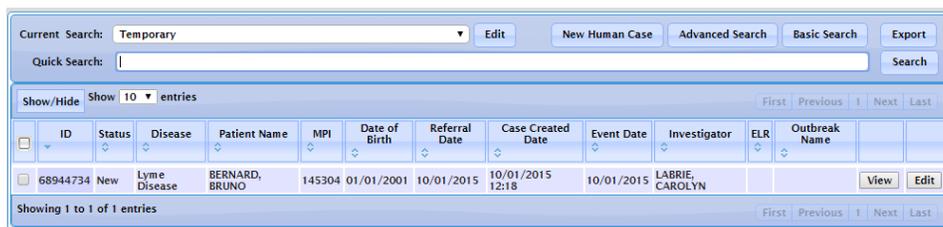
You will see a list of all the CDC Forms. Select the one you want to search:



The screenshot shows the 'Lyme Disease Case Report' form. It has a 'Search' button and a 'Search Type' dropdown set to 'CDC: Lyme Disease'. The form is divided into several sections: 'Patient Info (Internal Only)' with fields for Name, Address, Phone Number, and City; 'Patient Info' with fields for State, County, Zip, Age, Sex, Patient Ethnicity, and Patient Race (with radio button options for White, American Indian or Alaskan Native, Native Hawaiian or Other Pacific Islander, Asian, Black or African American, and Unknown); and 'Symptoms And Signs of Current Episode (Please Mark Each Question)' with checkboxes for 'Erythema migrans' (checked) and 'Arthritis Characterized By Brief Attacks of Joint Swelling'.

Note: The search form looks exactly like the data entry form with the exception of the date questions and the multi-select drop down menus. When searching a CDC form, the date questions become date ranges so you can narrow down your search criteria within a date range for a specific date question, such as birth date. You can also select more than one option for questions with drop down menus to broaden your search to include any cases with forms that contain that answer in the drop down.

You can enter your search criteria and click search. You will then be redirected to the case listing screen that will list all the cases that match your criteria:



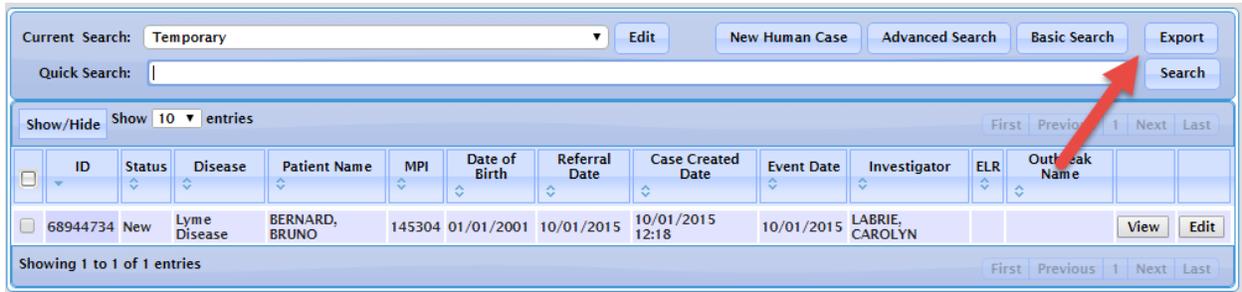
The screenshot shows the case listing screen. At the top, there are buttons for 'New Human Case', 'Advanced Search', 'Basic Search', and 'Export'. Below is a 'Quick Search' field. The main area is a table with the following columns: ID, Status, Disease, Patient Name, MPI, Date of Birth, Referral Date, Case Created Date, Event Date, Investigator, ELR, and Outbreak Name. The table contains one entry:

ID	Status	Disease	Patient Name	MPI	Date of Birth	Referral Date	Case Created Date	Event Date	Investigator	ELR	Outbreak Name
68944734	New	Lyme Disease	BERNARD, BRUNO	145304	01/01/2001	10/01/2015	10/01/2015 12:18	10/01/2015	LABRIE, CAROLYN		

At the bottom, it says 'Showing 1 to 1 of 1 entries'.

1.4 Export CDC Forms

From the Case listing, you can export CDC Form Data by clicking Export:



Current Search: Temporary

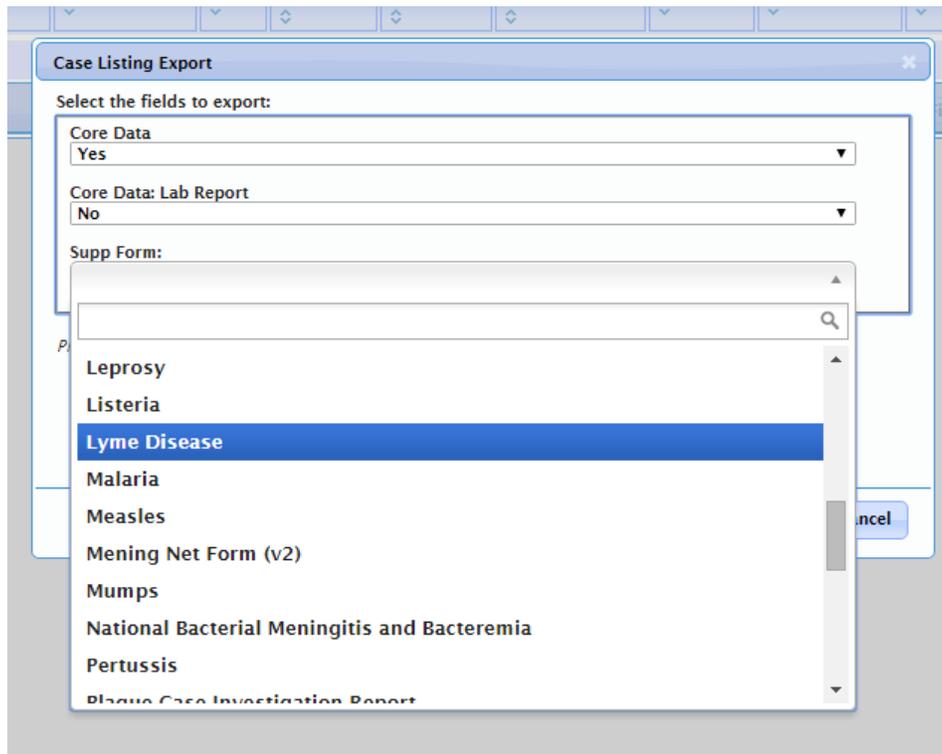
Quick Search:

Show/Hide Show 10 entries

ID	Status	Disease	Patient Name	MPI	Date of Birth	Referral Date	Case Created Date	Event Date	Investigator	ELR	Outbreak Name	
68944734	New	Lyme Disease	BERNARD, BRUNO	145304	01/01/2001	10/01/2015	10/01/2015 12:18	10/01/2015	LABRIE, CAROLYN			<input type="button" value="View"/> <input type="button" value="Edit"/>

Showing 1 to 1 of 1 entries

The following Dialog box will open and you can choose to export core data as well as the CDC Form Data:



Case Listing Export

Select the fields to export:

Core Data: Yes

Core Data: Lab Report: No

Supp Form:

- Leprosy
- Listeria
- Lyme Disease**
- Malaria
- Measles
- Mening Net Form (v2)
- Mumps
- National Bacterial Meningitis and Bacteremia
- Pertussis
- Plague Case Investigation Report

1.5 Audit Trail when the CDC Form is edited.

Every time a user edits the Form, the audit trail will record the information that was edited:

Case Reporting | Addresses | Demographics | Referrer | Lab Reports | Linked | CDC Form | Notes | Map | Audit | Comorbidity Search

Patient Name: BERNARD, BRUNO	Investigation Status: New	Locked by: Bernard, Bruno
Date of Birth: 01/01/2001	Case Classification: Unknown	Created By: Bernard, Bruno
Condition: Lyme Disease	Event Date: 10/01/2015	Last Update Date: 10/01/2015 16:19:42
Investigation ID: 68944734 (M145304)	Referral Date: 10/01/2015	Last Update By: Bernard, Bruno

Audit Log Print Audit Log | Collapse All | Expand All

Start Date : End Date : User : **All**

Show **10** entries Search:

Date Changed	User	Action Type																																				
10/01/2015 16:19:42	Bernard, Bruno	Save Supplemental Form																																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e6f2ff;"> <th>Action</th> <th>Field</th> <th>From</th> <th>To</th> </tr> </thead> <tbody> <tr> <td></td> <td>Lymphocytic meningitis</td> <td>Unknown</td> <td>Yes</td> </tr> </tbody> </table>			Action	Field	From	To		Lymphocytic meningitis	Unknown	Yes																												
Action	Field	From	To																																			
	Lymphocytic meningitis	Unknown	Yes																																			
10/01/2015 16:18:30	Bernard, Bruno	Save Supplemental Form																																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e6f2ff;"> <th>Action</th> <th>Field</th> <th>From</th> <th>To</th> </tr> </thead> <tbody> <tr> <td></td> <td>Antibody to B. burgdorferi higher in CSF than Serum</td> <td></td> <td>Yes</td> </tr> <tr> <td></td> <td>Arthritis Characterized By Brief Attacks of Joint Swelling</td> <td></td> <td>Yes</td> </tr> <tr> <td></td> <td>Bell's Palsy or Other Cranial Neuritis</td> <td></td> <td>Unknown</td> </tr> <tr> <td></td> <td>CSF Tested for Antibodies to B. burgdorferi</td> <td></td> <td>Yes</td> </tr> <tr> <td></td> <td>Encephalitis/Encephalomyelitis</td> <td></td> <td>Yes</td> </tr> <tr> <td></td> <td>Erythema migrans</td> <td></td> <td>Yes</td> </tr> <tr> <td></td> <td>Lymphocytic meningitis</td> <td></td> <td>Unknown</td> </tr> <tr> <td></td> <td>Radiculoneuropathy</td> <td></td> <td>No</td> </tr> </tbody> </table>			Action	Field	From	To		Antibody to B. burgdorferi higher in CSF than Serum		Yes		Arthritis Characterized By Brief Attacks of Joint Swelling		Yes		Bell's Palsy or Other Cranial Neuritis		Unknown		CSF Tested for Antibodies to B. burgdorferi		Yes		Encephalitis/Encephalomyelitis		Yes		Erythema migrans		Yes		Lymphocytic meningitis		Unknown		Radiculoneuropathy		No
Action	Field	From	To																																			
	Antibody to B. burgdorferi higher in CSF than Serum		Yes																																			
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	Erythema migrans		Yes																																			
	Lymphocytic meningitis		Unknown																																			
	Radiculoneuropathy		No																																			
10/01/2015 16:17:52	Bernard, Bruno	View																																				
10/01/2015 15:30:13	Bernard, Bruno	View																																				
10/01/2015 12:44:38	Bernard, Bruno	View																																				
10/01/2015 12:35:54	Bernard, Bruno	View																																				
10/01/2015 12:24:17	Bernard, Bruno	View																																				
10/01/2015 12:20:22	Bernard, Bruno	View																																				
10/01/2015 12:19:51	Bernard, Bruno	Merged Laboratory Name (Lab Report)																																				
10/01/2015 12:18:41	Bernard, Bruno	New Case From Physician Card																																				

Showing 1 to 10 of 11 entries ⏪ ⏩

2 New Custom Forms

To accommodate special public health situations that may involve investigations into a disease outbreak or harmful environmental exposures, there was a need to have the ability to create a customized form that can assist in these investigations. Sentinel now allows the User to define their own forms. The same functionality as described for the CDC forms above applies to these custom forms. This includes:

- Ability to View/Edit a Custom Form
- Ability to Print a Custom Form
- Ability to Search for any questions from the Custom Form
- Ability to Export all the questions from the Custom Form
- Ability to keep track of all the changes made to the Custom Form

In addition, you will be able to:

- Define the name of the Tab to access the Form from the patient's case.

Once a Form is created, you can associate the Custom Form to a disease just like you would associate a CDC Form to a disease:

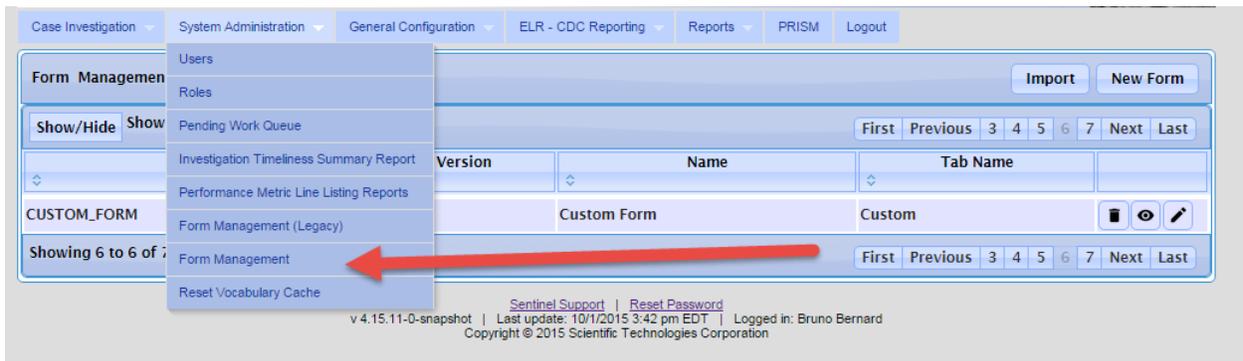
Add / Edit Disease	
Disease Name *	Anthrax
Disease Code	4001
Definition URL	http://www.cdc.gov/NNDSS/script/casedef.aspx?CondYrID=609&DatePub=1/1/2010
Active *	<input checked="" type="checkbox"/>
Aggregate	<input type="checkbox"/>
Disease Group *	Other
Program Group *	<ul style="list-style-type: none"> All All General Animal Bites Bacterial Disease Custom RO Foodborne/enteric Disease
Disease Class	NR
Definite Match Range	30 Days
Probable Match Range	180 Days
Definite Range Date	Event Date
Probable Match Range Date *	Event Date
Match Range Default Date*	Report Date
Investigator (Auto Assign Case)	
Supp Form Association	Custom Form
Communication Letter Path	

3 Creating and Defining a new Custom Form

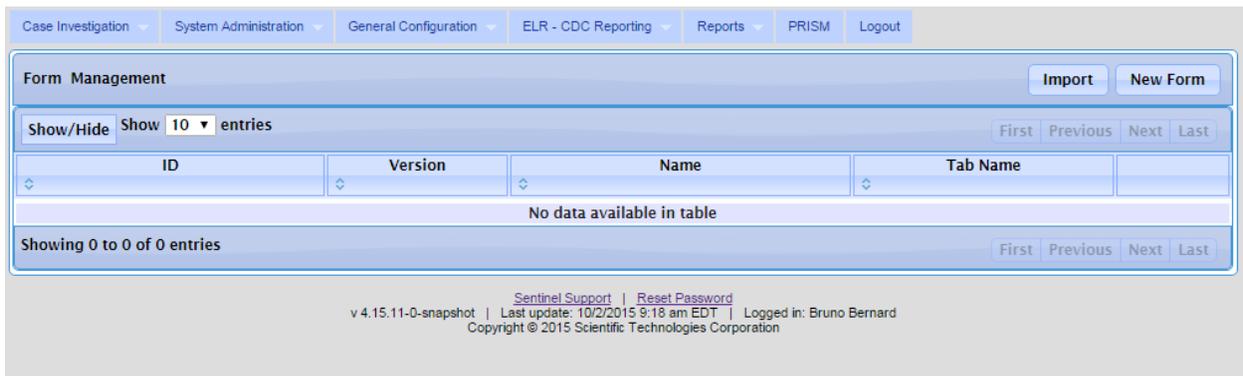
To access the Form Management Screen to Create a new Custom Form, you will need the Form Management Privilege. You can add the privilege by going to System Administrator/Roles and edit the role associated with your user:



Once you have the privilege activated, you will then be able to access Form Management from the System Administrator Menu:



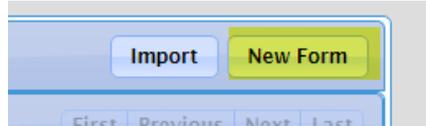
You will then be presented with a list of Custom Forms that are in the system (if any):



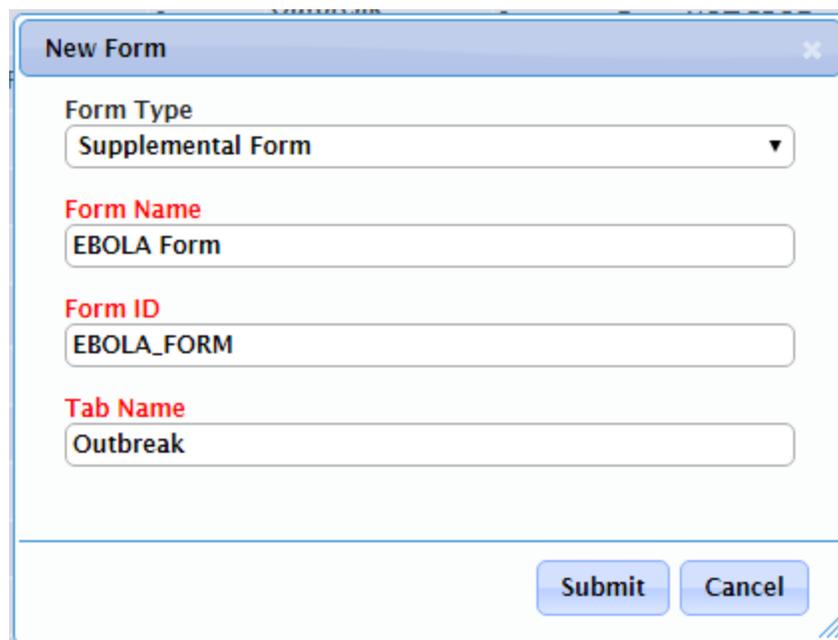
As a Reminder, you can still import a Java Form created by STC by clicking Import.

3.1 Create the Form

To create a new Form, simply click **New Form** on the Form Management Screen:



You will then be presented with the following Dialog box:

A screenshot of a 'New Form' dialog box. The dialog has a title bar with 'New Form' and a close button. It contains four input fields: 'Form Type' (a dropdown menu with 'Supplemental Form' selected), 'Form Name' (text input with 'EBOLA Form'), 'Form ID' (text input with 'EBOLA_FORM'), and 'Tab Name' (text input with 'Outbreak'). At the bottom right, there are 'Submit' and 'Cancel' buttons.

Definitions:

<p>Form Type</p>	<p>Options are:</p> <ul style="list-style-type: none"> ● Supplemental Form: Custom Supplemental Form to be associated with a Disease or an Outbreak. The form is available when viewing or editing a human disease case. ● Outbreak Event Form: Form to be associated with an outbreak. This form as an outbreak event data entry form. (New in May 2016 Release) ● Outbreak Summary Form: Form to be associated with an outbreak. There will only be one instance of the form filled per outbreak and can be filled within the outbreak management page. (New in May 2016 Release) <p>Default: Supplemental Form</p> <p>Note:</p> <ul style="list-style-type: none"> ● The Outbreak Event Form form definition requirement are the same as Supplemental Form except that the core fields option will be limited to: <ul style="list-style-type: none"> ○ Patient's First Name (Required to be present and marked are required) ○ Patient's Last Name (Required to be present and marked are required) ○ Patient's Middle Name ○ Patient's Date Of Birth ○ Patient's Sex ○ Patient's Race ○ Patient's Ethnicity ○ Patient's Home Phone ○ Patient's Work Phone ○ Investigation Address Street1, Street 2, State, City, Zip, County ● The Outbreak Summary Form form definition requirement are the same as Supplemental Form except that the core fields option will be limited to: <ul style="list-style-type: none"> ○ Outbreak Name ○ Outbreak Id
<p>Form Name</p>	<p>Name of the Form that will display at the top of the Form in the patient's case and in the drop down when a Supplemental Form is selected under Disease Code Management and Search. The maximum number of characters is 200. This is a required field.</p>
<p>Form ID</p>	<p>Unique identifier for the form (Uppercase and alphanumeric Name with no space). The maximum number of characters is 75. The Form ID has to be a unique ID across all the Forms. Note: If you skip this field and begin to enter the Form Name, the system will automatically create the ID for you. This is a required field.</p>
<p>Tab Name</p>	<p>Define the name of the Form on the Form Tab. It is recommended to keep the name as short as possible. The maximum number of characters is 40. This is a required field.</p>

When you have finished entering the required information in the fields, click **Submit**. You will be directed to the **Form Builder** where you will be able to create your form:

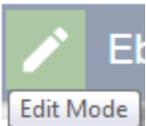


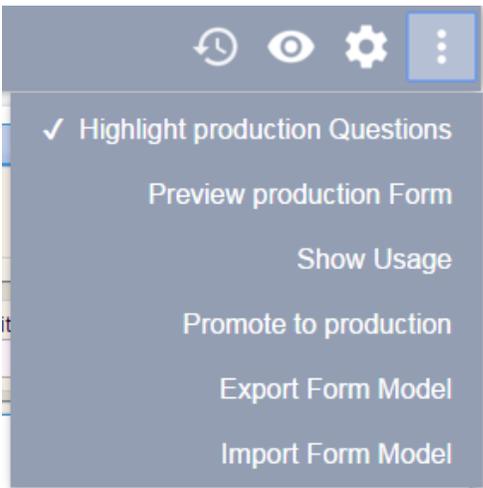
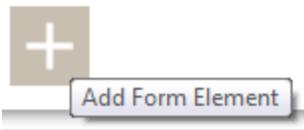
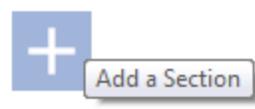
4 Form Builder

4.1 Navigation through Icons

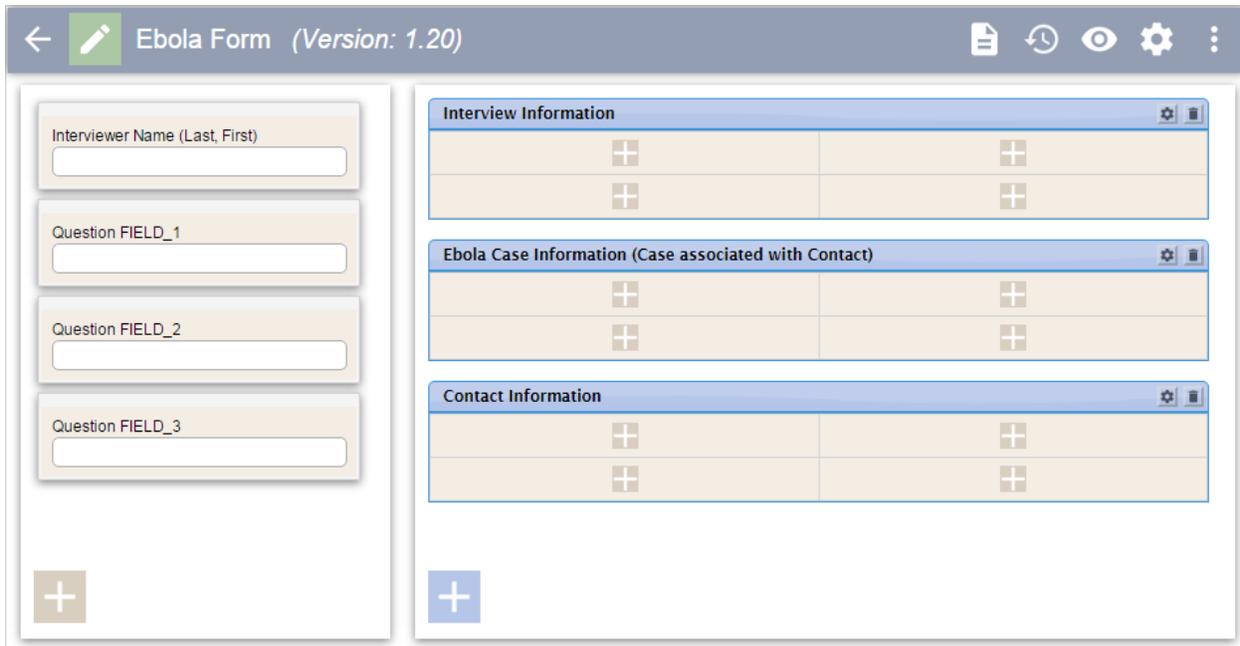
To improve the user experience in Sentinel, icons will be used to create the Custom form in place of text to modernize the look and feel of the system and keep the screen less busy. If you hover your mouse over the button, a tooltip will appear to inform you of the button's function.

Button definitions: What do they all mean?

	<p>If you click on the left Arrow, it will take you back to the Form Management List Screen.</p>						
	<p>The icon next to the arrow is not a button but an indicator to let you know which mode you are in. Possible values are:</p> <table border="1" data-bbox="722 982 1398 1402"> <tr> <td data-bbox="738 1003 852 1108">  </td> <td data-bbox="852 1003 1391 1108"> <p>The Form is in Edit Mode. You can make changes.</p> </td> </tr> <tr> <td data-bbox="738 1129 852 1234">  </td> <td data-bbox="852 1129 1391 1234"> <p>The Form is in Read Only Mode (It is either disabled or currently locked for edit by another user). The reason will appear underneath.</p> </td> </tr> <tr> <td data-bbox="738 1255 852 1360">  </td> <td data-bbox="852 1255 1391 1360"> <p>The Form is currently under maintenance and Pending to go in Production (See Versioning/Promote to Production Section).</p> </td> </tr> </table>		<p>The Form is in Edit Mode. You can make changes.</p>		<p>The Form is in Read Only Mode (It is either disabled or currently locked for edit by another user). The reason will appear underneath.</p>		<p>The Form is currently under maintenance and Pending to go in Production (See Versioning/Promote to Production Section).</p>
	<p>The Form is in Edit Mode. You can make changes.</p>						
	<p>The Form is in Read Only Mode (It is either disabled or currently locked for edit by another user). The reason will appear underneath.</p>						
	<p>The Form is currently under maintenance and Pending to go in Production (See Versioning/Promote to Production Section).</p>						
	<p>The Form Name and the Version. The version consists of 2 numbers separated by a dot. The first number is the Major Version (See Versioning/Promote to Production Section). The second number is the minor version (Every time you make a change, this number will increment).</p>						
	<p>Every time you make a modification to the Form, it is saved automatically (this is why there are no Save button). You can click on Form History to display all changes since it was last Promoted to Production (See Form History Section or Reverting Changes Section).</p>						

	<p>Even if the Form look and feel is similar to the Form Builder, you can click on Preview Form to view the form the way it would actually look like when a data entry user uses this Form.</p>
	<p>At any time, you can edit the Form Name, Tab Name, Tab Name (Short) or disable the Form (See Disabling or Deleted Form).</p>
	<p>The last icon to the right is the Action Menu. It offers more options, which include:</p> <ul style="list-style-type: none"> • “Highlight production Questions” will highlight the Questions that are already in production (See Editing a Form that was Promoted to Production). • “Preview production Form” will show the form the way it currently looks for data entry user. • “Show Usage” will display the users that are currently performing data entry on this Form. It will also list the diseases/outbreak associated with this form. • “Promote to Production” will be used when you are done with the design of the Form and you want to make it available to the data entry user (See Versioning/Promote to Production Section). • “Export Form Model” will be used when you want to export the form you created in another system (or another form) (See Exporting/Important Form Model Section). (New in May 2016 Release) • “Import Form Model” will be used when you want to import a form model previously exported. (See Exporting/Important Form Model Section). (New in May 2016 Release)
	<p>Click this button to add a new Form Element (See Adding Sections and Form Elements Section). Note: The beige color is the same as the same color background for “Questions” in Sentinel.</p>
	<p>Click this button to add a new Section (See Adding Sections and Form Elements Section). Note: The blue color is the same as the color of the Section Headers in Sentinel.</p>

4.2 Page Layout



There are 2 panels:

- The panel on the left is a temporary place holder for Form Element of Type Question. Any question that is left here will not be visible to the data entry user.
- The panel on the right is the actual form layout.

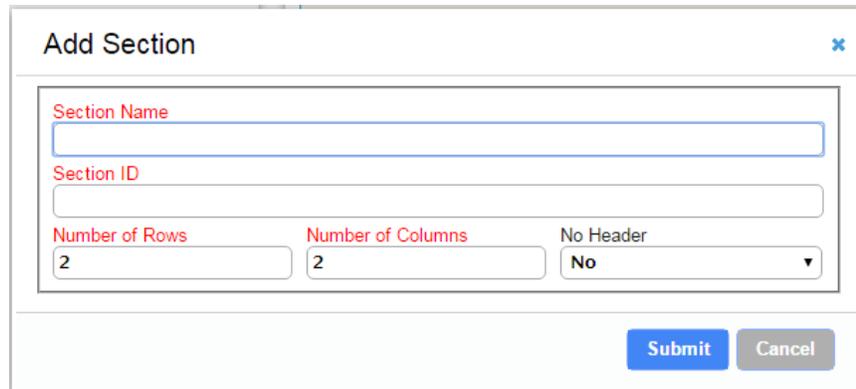
The remaining sections of this document will explain how to perform the following functions:

- Add a Form Element of Type Question to the left Panel
- Add a section to the right Panel
- Add a Form Element to the right Panel
- Organize Form Elements
- Delete Form Elements
- Reorganize sections
- ...

5 Adding Sections

5.1 Adding Sections

To add a new section, click on the blue icon . The following Dialog box will appear:



Definitions:

Section Name	Name of the Section that will display at the top of the Section. The maximum number of characters is 120 . This is a required field.
Section ID	Unique identifier for the Section (Uppercase and alphanumeric Name with no space). The maximum number of characters is 75. The Section ID has to be a unique ID within the Form. Note: If you skip this field and begin to enter the Section Name, the system will automatically create the ID for you. This is a required field.
Number of Rows	When creating a section, the form builder will display a virtual table where you can add Form Elements. Number of Rows define the number of rows you would like this table to have. You can change the number at any time. This is a required field.
Number of Columns	When creating a section, the form builder will display a virtual table where you can add Form Elements. Number of Columns define the number of columns you would like this table to have. You can change the number at any time. This is a required field.
No Header (New in Feb 2016 Release)	If you want to add sections on a form with no header and title, set No Header to Yes .

Example:

Click the blue icon . The following Dialog box will appear:

Add Section ✕

Section Name

Section ID

Number of Rows
 Number of Columns
 No Header

Complete the required information and click Submit. The section is now added to the right panel and ready to be used:

←  EBOLA Form (Version: 1.2)
↺ 👁 ⚙ ⋮

+

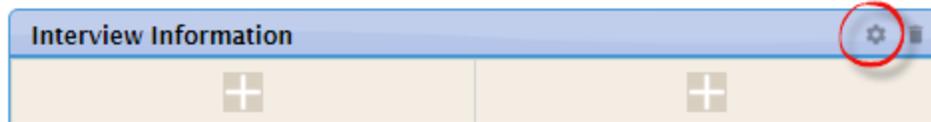
Interview Information

+	+
+	+

+

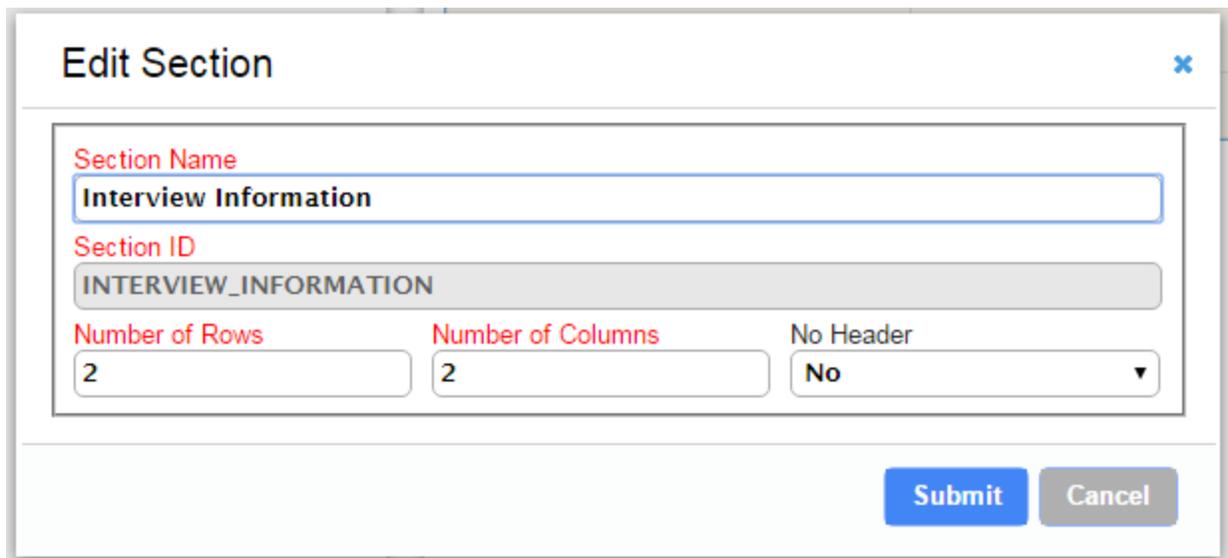
5.2 Editing a Section Name

To edit a section, click the following icon in the blue Section header you want to edit:



Note: You can also double click on the blue section.

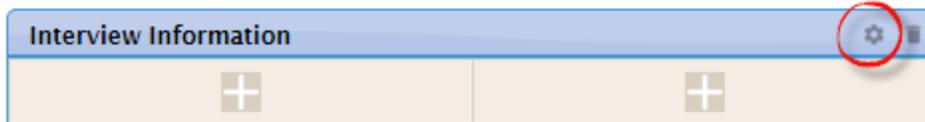
The following Dialog box will appear:

A screenshot of a dialog box titled "Edit Section" with a close button (X) in the top right corner. The dialog contains several input fields: "Section Name" with the value "Interview Information", "Section ID" with the value "INTERVIEW_INFORMATION", "Number of Rows" with the value "2", "Number of Columns" with the value "2", and "No Header" with a dropdown menu showing "No". At the bottom right of the dialog are two buttons: "Submit" and "Cancel".

Update the the Section Name with your edits and click Submit. The section on the right Panel will then be updated.

5.3 Resizing a Section/Table/Fieldset

To resize a section, click the following icon on the blue Section header you want to resize:



The following Dialog will appear:

Edit Section ✕

Section Name

Section ID

Number of Rows **Number of Columns** **No Header**

You can increase and/or decrease the number of rows or columns. Note that if the number of rows (or columns) cannot be decreased, an error will appear to let you know that the number cannot be decreased due to questions that are in the cells that comprise of the row and column you wish to remove:

Interview Information

+	test
---	------

Edit Section ✕

⚠ Error: You must correct the following error(s) before proceeding:

- Number of Columns cannot be decreased from 2 to 1

Section Name

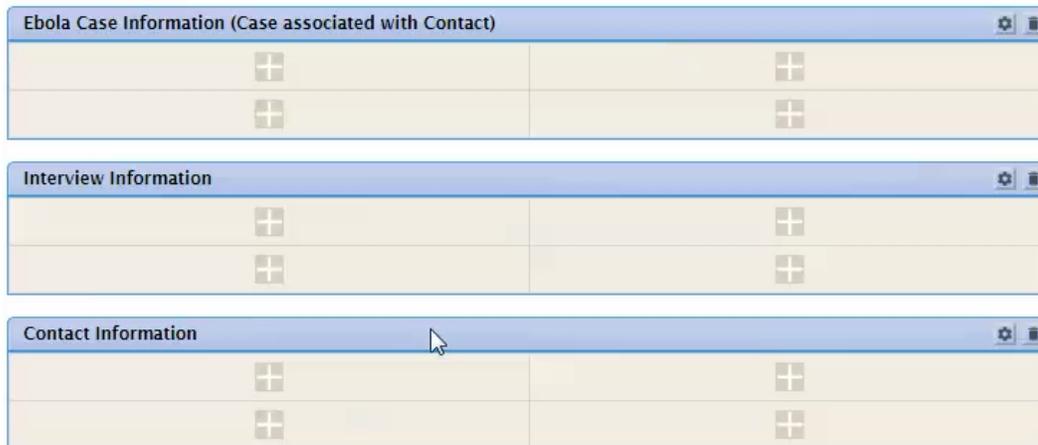
Section ID

Number of Rows **Number of Columns** **No Header**

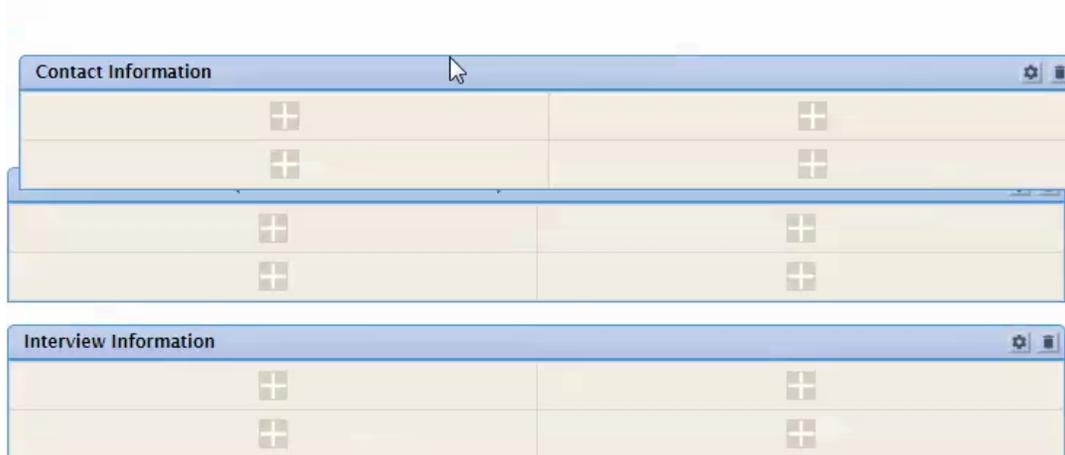
Note: The same functionality applies to Fieldsets and tables.

5.4 Reorganizing a Section (Drag and Drop)

Click on the blue header of the section you want to move:



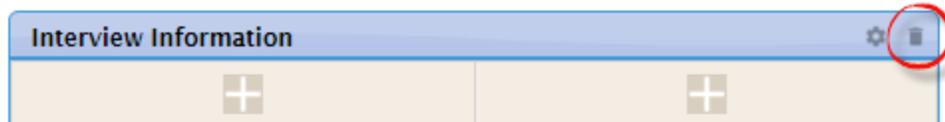
While keeping your Left mouse button pressed, move the cursor to where you would like the section to be moved to:



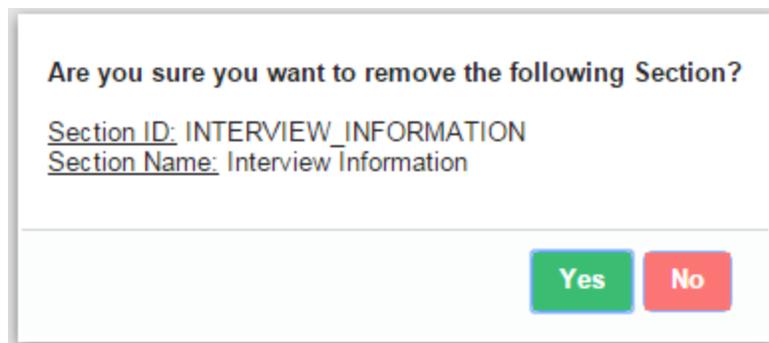
To see a video demonstration, click on this [link](#).

5.5 Deleting a Section

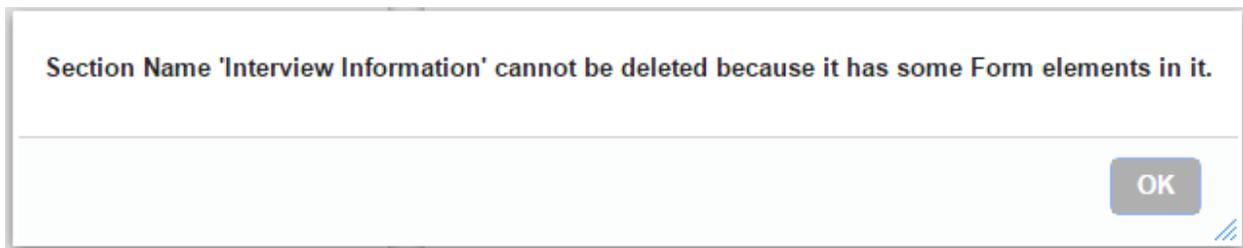
To delete a section, click the following icon on the blue Section header you want to delete:



If the Section can be deleted, you will be then be prompted for a confirmation:



If the section cannot be deleted due to Form Elements present in the section, the following window will appear instead:



6 Adding Form Elements

6.1 Adding a Form Element

To add a new Form Element, click on the beige icon  at the bottom left of the page. The following Dialog box will appear:

Add Form Element
✕

Element Type

Free Text Question

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required	Cell Spanning	Label Location
No	Yes	Above Question

Free Text Question Properties

Format

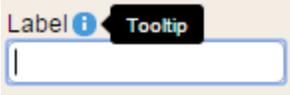
Plain Text

Validation

Maximum Number of characters

Submit
Cancel

Definitions:

<p>Element Type</p>	<p>You have the following options based on the type of Form Element you wish to add:</p> <ul style="list-style-type: none"> • Free Text Question • Dropdown Question • Multi Select Question • Check Box Question • Core Data Question • Fieldset (Option available on the right panel only) • Table (Option available on the right panel only) • Label • Read Only Text <p>For more details, see the Type of Form Element Supported Section.</p>
<p>Label</p>	<p>Name of the Form Element that will display. The maximum number of characters is 200. For most of the Form Element the location is above the Element and can be changed using the Label Location Option. This is a required field when applicable (Label does not apply for all the Form Element Types).</p>
<p>ID</p>	<p>Unique identifier for the Form Element (Uppercase and alphanumeric name with no space). The maximum number of characters is 75. The ID has to be a unique ID within the Form. Note: If you skip this field and begin to enter the Label, the system will automatically create the ID for you. This is a required field when applicable (ID does not apply for all the Form Element Types).</p>
<p>Header for CSV Export</p>	<p>By default, the Label is used for the CSV export. If you want the Header in the CSV Export to be different, you can enter a different one here. The maximum number of characters is 200. Note: Header for CSV Export does not apply for all the Form Element Types.</p>
<p>Tooltip</p>	<p>Enter text for a tooltip if you wish to have a tooltip to be displayed as part of the Label with a blue icon like this:</p>  <p>The maximum number of characters is 200. Note: Tooltip does not apply for all the Form Element Types.</p>
<p>Required (New in Feb 2016 Release)</p>	<p>This is only applicable to Form Elements of Type Question.</p> <ul style="list-style-type: none"> • Set to Yes if you want the question to be required when entering data on this form.

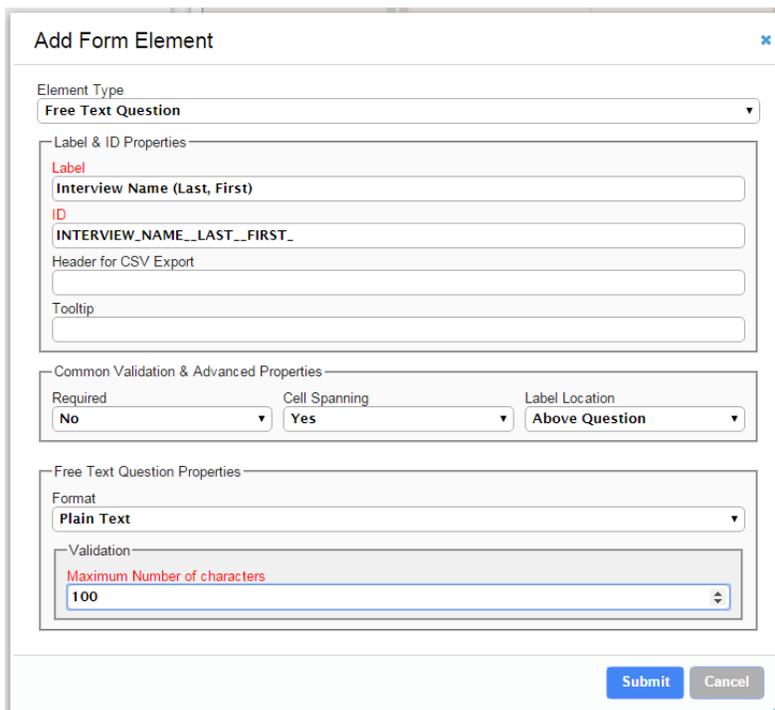
	<ul style="list-style-type: none"> • Set to No if you want the question not to be required when entering data on this form. <p>Default No</p> <p><u>Does not apply to:</u></p> <ul style="list-style-type: none"> • Checkboxes Questions Form Element • Core Data Questions Form Element • Fieldset Form Element • Table Form Element • Label Form Element
Cell Spanning	<ul style="list-style-type: none"> • Set to No if you want the Form Element to remain always within the Table Cell. • Set to Yes if you want the form Element to extend itself within all the following empty Table Cells until it reaches the end of the row or a cell with a Form Element. <p>Default is Yes.</p>
Label Location (New in Feb 2016 Release)	<p>This is only applicable to Form Element of Type Question.</p> <ul style="list-style-type: none"> • Set to Above Question when you want the label to appear above the question. • Set to Above Question With Fieldset when you want the label to appear within a Fieldset surrounding the question. • Set to Hidden if you do not want the label to appear (mostly used when doing table data entry). • Set to Right next to Checkbox when you want the label to appear next to the checkbox (Only application to checkboxes). <p>Default is Above Question.</p> <p><u>Does not apply to:</u></p> <ul style="list-style-type: none"> • Fieldset Form Element • Table Form Element • Label Form Element
Type Specific Configuration	<p>Based on the Form Element Type, you will be prompted with different parameters to define (see Type of Form Element Supported).</p>

Once you enter all the appropriate information, the Form Element will appear in the left panel (only Form Element of Type Question can be added to the left Panel).

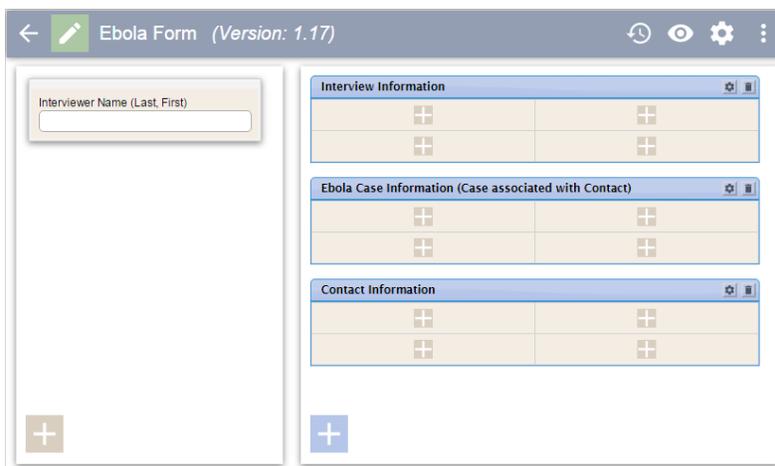
As another alternative in adding a Form Element, you can click on the beige icon within each section in the right panel. This will add the Form Element directly in that section.

Example:

We are going to add a Form Element of type **Free Text Question, Labeled Interviewer Name (Last, First)**, with a maximum number of characters of 100. We will add this question by clicking the beige plus icon in the bottom left panel.



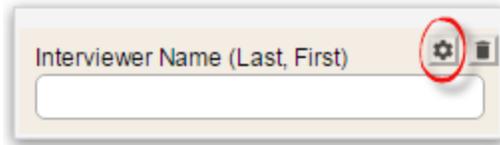
After entering this information, click **Submit**.



The Form Element of type Question has now been added to the left panel. If you were to click on a beige plus icon within a section, the Form Element would have been added to that selected section. To move a Form Element to a section in the right panel, [see Reorganizing a Section \(Drag and Drop\)](#).

6.2 Editing a Form Element

To edit a Form Element, move your mouse over the Form Element. The following icon will appear. Click on the icon to edit the Form Element:



Note: You can also double click on the Form Element to make edits to it.

The following Dialog box will appear:

Edit Free Text Question ✕

Element Type
Free Text Question

Label & ID Properties

Label
Interview Name (Last, First)

ID
INTERVIEW_NAME__LAST__FIRST_

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required: Cell Spanning: Label Location:

Free Text Question Properties

Format
Plain Text

Validation
Maximum Number of characters
100

You will be able to modify parameters such as the Label, Header for CSV Export, Tooltip, Required, Cell Spanning, and Label Location. You will not be able to change the Element Type. Click Submit when you are finished editing.

6.3 Reorganize Form Element (Drag and Drop)

There are 4 ways to move Form Elements as you create a Custom Form:

- Within the Left Panel
- From the Left Panel to the Right Panel
- Within the Right Panel
- From the Right Panel to the Left Panel

It is important to note that Only Form Element of type Questions can be in the left Panel.

6.3.1 Moving Form Elements of Type Question within the Left Panel

The Left Panel is a temporary place for Form Elements of Type Question while working on the form layout. It is also a place for questions you no longer want to include in the form. For example, if the question was part of the form when it was in Production and the question no longer needs to be part of the form, you can move it to the left panel and it will no longer appear in the form. This will ensure that any information entered for this question at the time it was in Production will be retained. For more information, see [Editing/Deleting Question after Promotion to Production](#) section.

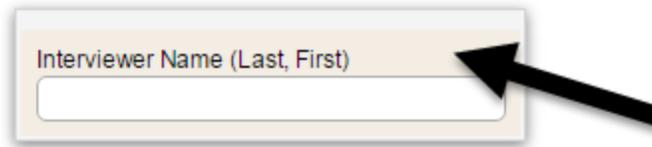
To re-organize questions in the left panel, click and drag on the small gray section above the question and move the question up and down:



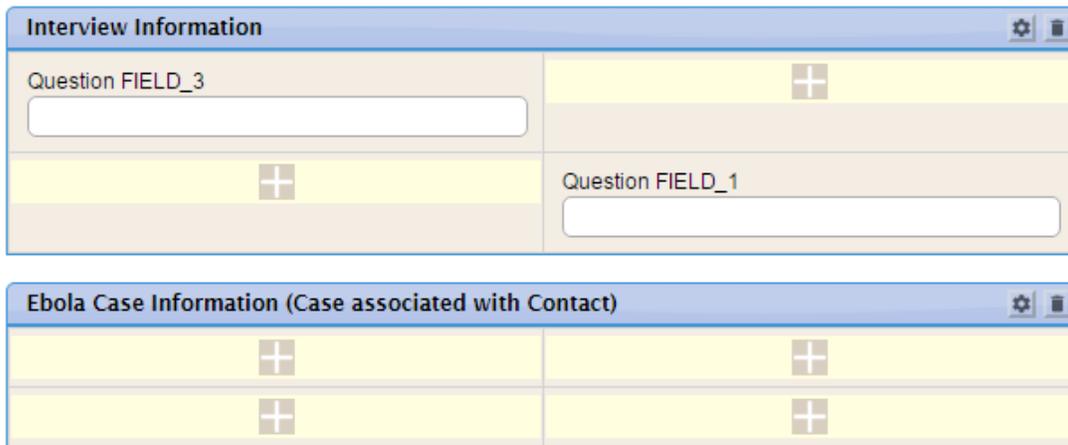
To see a video demonstration, click on this [link](#).

6.3.2 Moving Form Elements of Type Question from the Left Panel to the Right Panel

If you want to include a Form Element of Type Question from the Left Panel to a specific table cell of a Section in the Right Panel, drag and drop the question using the beige background and not the gray bar:



While you are dragging the question, the possible drop locations in the sections will be highlighted in yellow:



To see a video demonstration, click on this [link](#).

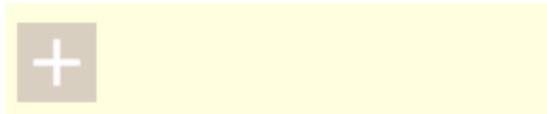
6.3.3 Moving Form Elements within the Right Panel

You can move Form Element within the Right Panel by dragging and dropping the Form Element into any empty table cell of a Section (applies to Table Cell of Fieldset and Table as well). If you drop the Form Element on another Form Element, the Form Builder will swap the Form Elements.

To see a video demonstration, click on this [link](#).

6.3.4 Moving Form Elements of Type question from the Right Panel to the Left Panel

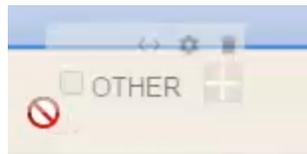
To move a Form Element of Type Question from the Right Panel to the Left Panel, drag and drop the Form Element at the bottom of the Left Panel with the gray plus sign. The drop area will be highlighted in yellow as you drag the Form Element to the Left Panel.



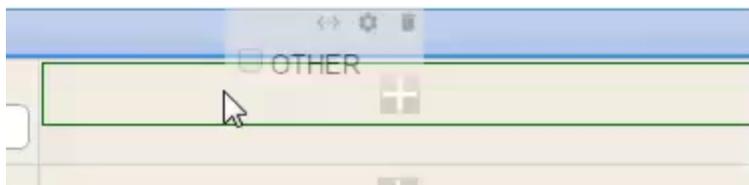
To see a video demonstration, click on this [link](#).

6.3.5 Visual Indicator while dragging (New in Feb 2016 Release)

While Dragging, a red visual indicator will tell you when the Form Element cannot be dropped when you drag the Form Element across the Form:



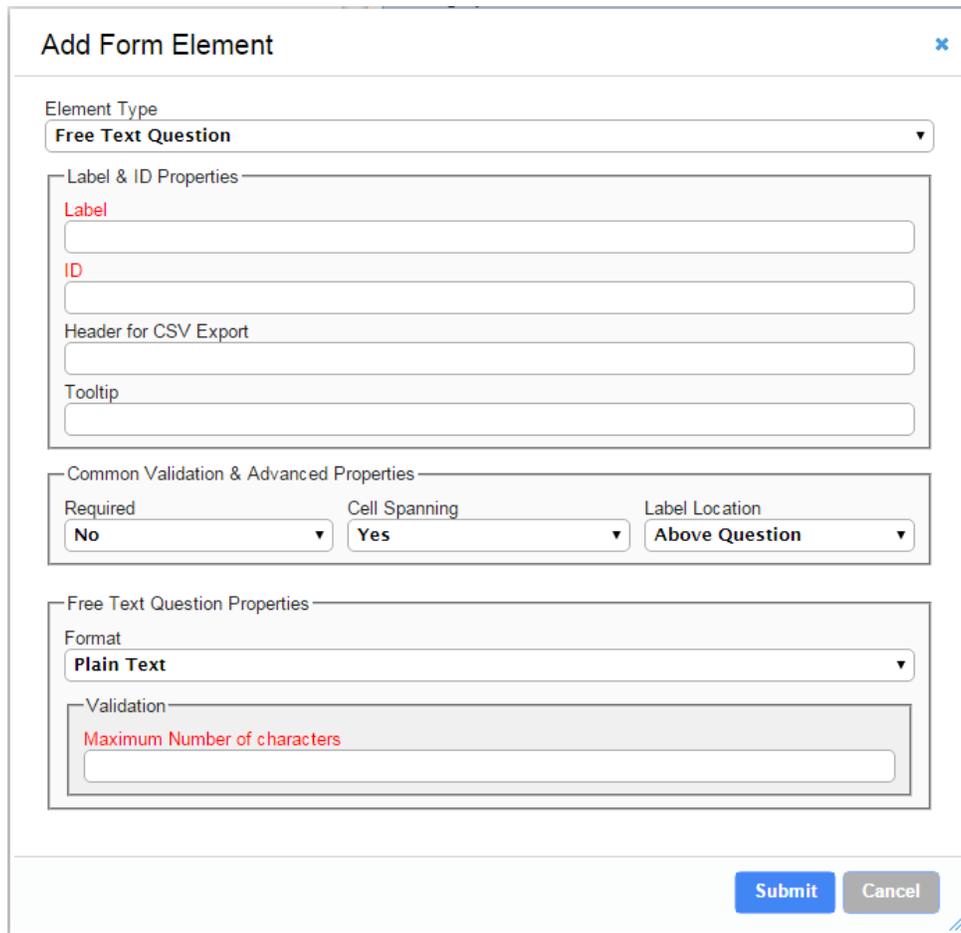
When the Form Element can be dropped, the normal arrow will appear along with green borders on the target element:



6.4 Types of Form Element Supported

6.4.1 Free Text Question

A Free Text Question allows the user to answer the question using alphanumeric characters:



The screenshot shows a dialog box titled "Add Form Element" with a close button (X) in the top right corner. The dialog is organized into several sections:

- Element Type:** A dropdown menu set to "Free Text Question".
- Label & ID Properties:** A section containing four text input fields: "Label", "ID", "Header for CSV Export", and "Tooltip".
- Common Validation & Advanced Properties:** A section with three dropdown menus: "Required" (set to "No"), "Cell Spanning" (set to "Yes"), and "Label Location" (set to "Above Question").
- Free Text Question Properties:** A section containing:
 - Format:** A dropdown menu set to "Plain Text".
 - Validation:** A sub-section with a text input field labeled "Maximum Number of characters".

At the bottom right of the dialog, there are two buttons: "Submit" (in blue) and "Cancel" (in grey).

Select the format for the Free Text Question. Available options are:

- Plain Text
- Plain Text (Multi-Lines)
- Date
- Number (New in Feb 2016 Release)
- Number with Decimal Point (New in Feb 2016 Release)
- Phone
- Time Military (New in Feb 2016 Release)
- Email (New in Feb 2016 Release)
- Zip Code (New in Feb 2016 Release)

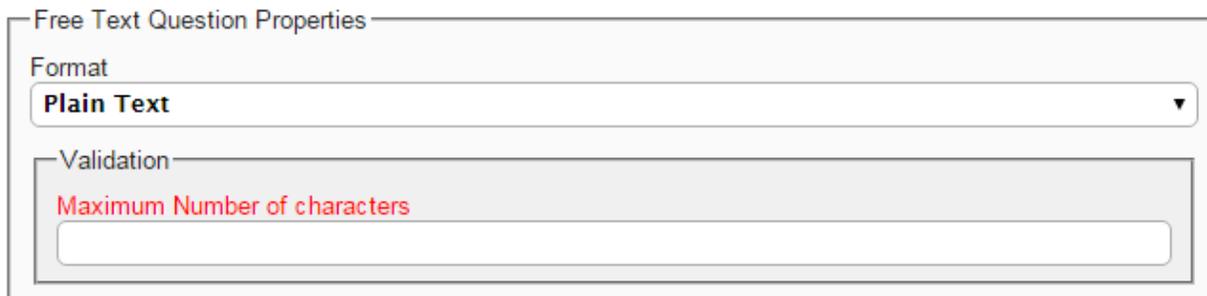
The default selection is **Plain Text**.

6.4.1.1 Free Text Question (Format: Plain Text)

When you select **Plain Text** as the Format, the following configuration will appear:

- Maximum Number of characters (Required). The valid range is from 1 to **2000** characters.

Screenshot of Plain Text Question Properties:



Free Text Question Properties

Format

Plain Text

Validation

Maximum Number of characters

Note: When promoted to production, you will no longer be able to:

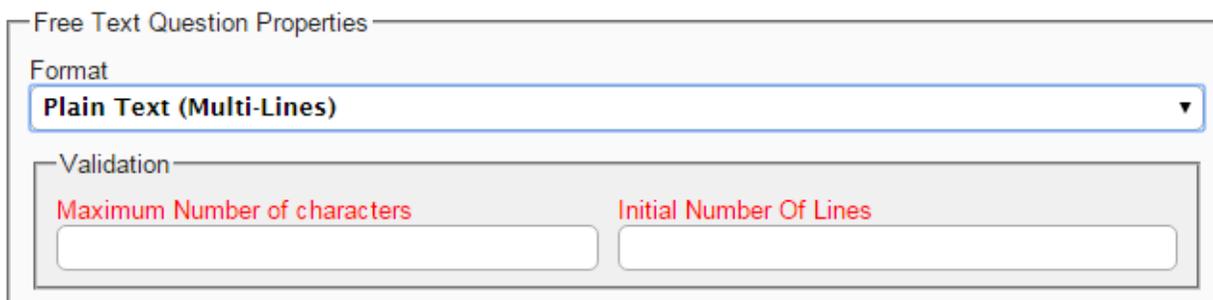
- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.2 Free Text Question (Format: Plain Text Multi-Lines)

When you select **Plain Text (Multi-Lines)** as the Format, the following configuration will appear:

- Maximum Number of characters (Required). The valid range is from 1 to **2000** characters.
- Initial Number Of Lines (Required). The valid range is from 1 to 30.

Screenshot of Plain Text (Multi-Lines) Question Properties:



Free Text Question Properties

Format

Plain Text (Multi-Lines)

Validation

Maximum Number of characters

Initial Number Of Lines

Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.3 Free Text Question (Format: Date) (New in Feb 2016 Release)

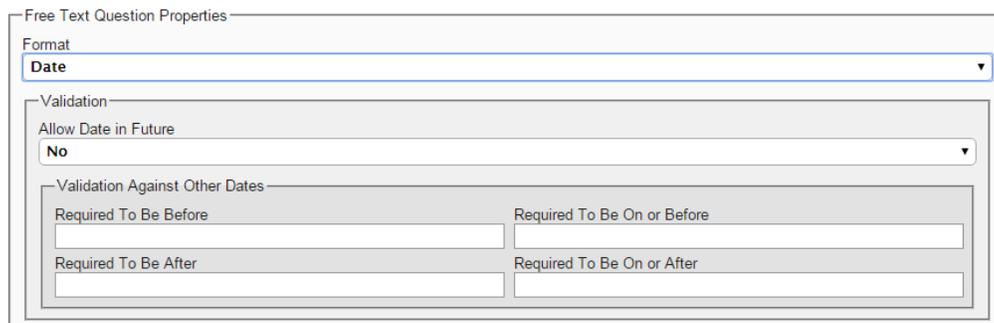
When you select **Date** as the Format, the following configuration will appear:

- Allow Date in Future: Set to **Yes** if do want to allow the data question to be in the future. Default is **No**.
- Validation Against Other Dates:
 - Required To Be Before: Multiselection of other questions (within the form) you want your question to be strictly before.
 - Required To Be After: Multiselection of other questions (within the form) you want your question to be strictly after.
 - Required To Be On or Before: Multiselection of other questions (within the form) you want your question to be on or before.
 - Required To Be On or After: Multiselection of other questions (within the form) you want your question to be on or after.

Note:

- A date question can only be part of a validation only if it is in the Form Layout.

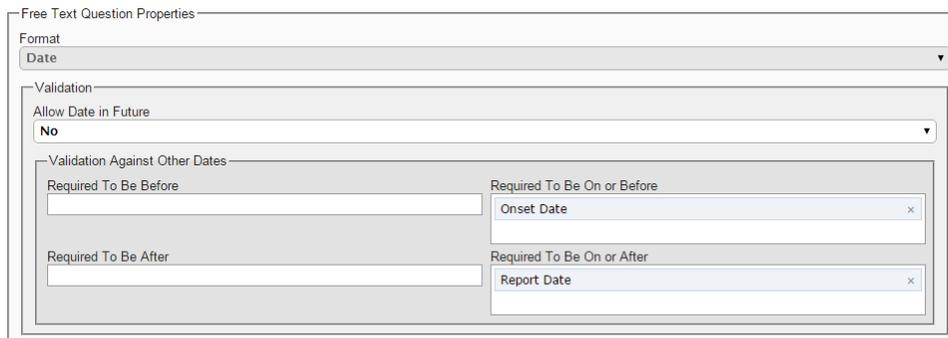
Screenshot of Date Question Properties:



Note: When promoted to production, you will no longer be able to **Change the Format**.

Important: The system will not validate the consistency of the dates validation across all the other date questions. If not configured properly, data validation errors will appear no matter how the data entry form is filled.

Example of Date validation for a diagnosis date question:



6.4.1.4 Free Text Question (Format: Month/Year) (New in August 2016 Release)

When you select **Month/Year** as the Format, there will be no other configuration to add.

Screenshot of Month/Year Question Properties:

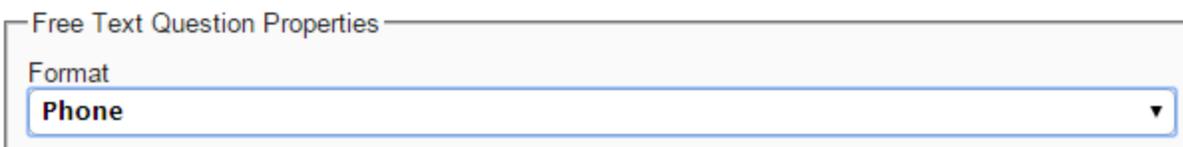


Note: When promoted to production, you will no longer be able to **Change the Format**.

6.4.1.5 Free Text Question (Format: Phone)

When you select **Phone** as the Format, there will be no other configuration to add.

Screenshot of Phone Question Properties:



Note: When promoted to production, you will no longer be able to **Change the Format**.

6.4.1.6 Free Text Question (Format: Number) (New in Feb 2016 Release)

When you select **Number** as the Format, the following configuration will appear:

- Min Value: Minimum Allowed Value (number from 0 to 2147483647)
- Max Value: Maximum Allowed Value (number from 0 to 2147483647)

Screenshot of Number Question Properties:

Free Text Question Properties

Format

Number

Validation

Min Value

0

Max Value

100

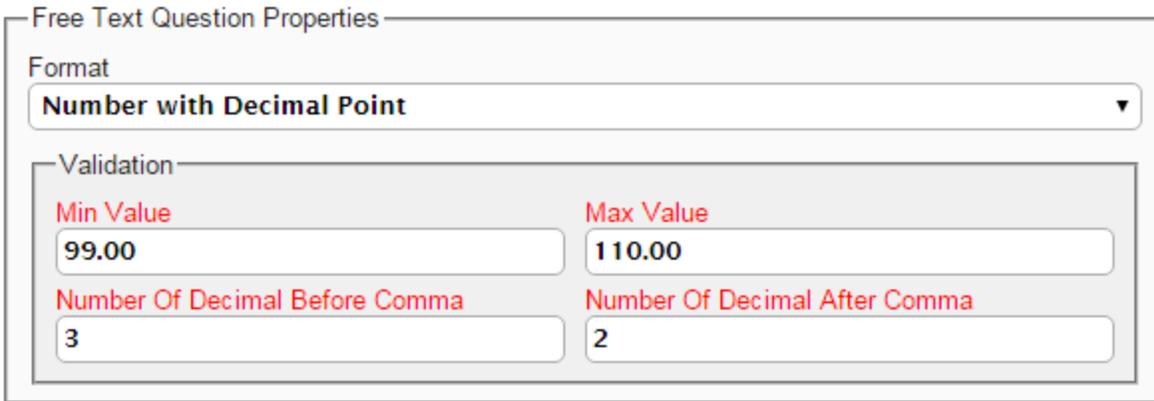
Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the range Min Value to Max Value

6.4.1.7 Free Text Question (Format: Number with Decimal Point) (New in Feb 2016 Release)

When you select **Number** as the Format, there will be no other configuration to add.

Screenshot of Number Question Properties:



Free Text Question Properties

Format
Number with Decimal Point

Validation

Min Value 99.00	Max Value 110.00
Number Of Decimal Before Comma 3	Number Of Decimal After Comma 2

Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the range Min Value to Max Value
- Decrease Number of Decimal Before Comma
- Decrease Number of Decimal After Comma

6.4.1.8 Free Text Question (Format: Time Military) (New in Feb 2016 Release)

When you select **Time Military** as the Format, there will be no other configuration to add.

Screenshot of Time Military Question Properties:



Free Text Question Properties

Format
Time Military

Note: When promoted to production, you will no longer be able to **Change the Format**.

6.4.1.9 Free Text Question (Format: Email) (New in Feb 2016 Release)

When you select **Email** as the Format, there will be no other configuration to add.

Screenshot of Time Military Question Properties:



Free Text Question Properties

Format
Email

Validation
Maximum Number of characters
 100

Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.10 Free Text Question (Format: Zip Code) (New in Feb 2016 Release)

When you select **Zip Code** as the Format, there will be no other configuration to add.

Screenshot of Time Military Question Properties:



Free Text Question Properties

Format
Zip Code

Note: When promoted to production, you will no longer be able to **Change the Format**.

6.4.2 Dropdown Question

You will be able to define a dropdown menu with your own options or use a predefined value set.

Add Form Element
✕

Element Type

Dropdown Question
▼

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required

No
▼

Cell Spanning

Yes
▼

Label Location

Above Question
▼

Dropdown Question Properties

Value Set

CUSTOM
▼

Include Blank Option

No
▼

Automatically Sort Options

Yes
▼

Default	Hide/Del	Code	Display
<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Submit

Cancel

Definitions:

Value Set	<p>Options:</p> <ul style="list-style-type: none"> ● Custom: Define you own options ● All other options are predefined where selecting one of these options will pre-populate the value set with predefined selections. You will have the option to rename the Display, select the default value and hide some options. ● You can also select administrator configurable Code Set (New in Feb 2016 Release): <ul style="list-style-type: none"> ○ CODESET_CITY_DISPLAY_AS_CODE: all cities for the default state ○ CODESET_COUNTY: all counties for the default state ○ CODESET_FACILITY_ALL: all facilities (except manual facilities) ○ CODESET_INVESTIGATION_STATUS_ALL: all investigation status ○ CODESET_LPHU: all LPHU ○ CODE_OUTBREAK: all active outbreak ○ CODESET_REGION: all regions ○ CODESET_REPORTABLE_CONDITION_ALL: all active reportable condition.
Automatically Sort Options (New in Feb 2016 Release)	<p>By default, options will be sorted. For custom options only, you can disable this. You can manually change the order by clicking on the up and down arrows at the end of every option: </p>
Include Blank Option	<p>Options:</p> <ul style="list-style-type: none"> ● Yes: A blank value will be added as an option ● No: No Blank Value ● Yes (Default Value): A blank value will added as an option and will be the default value.
Options / Default	<p>Check if you want the option to be the default value.</p>
Options / Hide/ Del	<p><u>If Custom is selected in the Value Set:</u></p> <ul style="list-style-type: none"> ● If the question has not been promoted to production, you can delete the option by clicking the trash icon. ● If the question has been promoted to production, you can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed. <p><u>If a predefined Value is selected in the Value Set:</u></p> <ul style="list-style-type: none"> ● You can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed.
Options / Code	<p>Database Code for the selection option (used in the database). To make the Database more efficient try to use a 1 to 3 characters code. Example: U for Unknown, Y for Yes This is disabled when Value Set is not Custom (or field is in production).</p>
Option / Display	<p>Option to display to the user. Maximum number of characters: 70</p>

To enter more than one options:

- Under the Code column, enter the code
- Press Tab
- Enter the display
- Press Tab and a new line will appear.

There is no limit on the number of options.

You will also have the option to include a blank option by selecting **Yes** in **Include Blank Option**. If you want the blank option to be the default, select **Yes (Default Value)**.

Note: When promoted to production, you will no longer be able to:

- Delete an option
- Change the Code

You will be able to:

- Hide the option (Will be hidden in forms where the option was not selected)
- Change the Display
- Change the default option

6.4.3 Multi Select Question

With a Multi Selection Question, you will be able to define a dropdown with your own custom options or using a predefined value set.

Add Form Element
✕

Element Type

Multiselect Question
▼

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required

No
▼

Cell Spanning

Yes
▼

Label Location

Above Question
▼

Multiselect Question Properties

Value Set

CUSTOM
▼

Options

Hide/Del	Code	Display
■		

Submit

Cancel

Definition:

Value Set	<p>Options:</p> <ul style="list-style-type: none"> ● Custom: Define you own options ● All other options are predefined where selecting one of these options will pre-populate the value set with predefined selections. Anything else: Use a predefined option. (In this case Options will be pre-populated (You will have the option to rename the Display, select chose the default value and hide some options.) ● You can also select administrator configurable Code Set (New in Feb 2016 Release): <ul style="list-style-type: none"> ○ CODESET_CITY_DISPLAY_AS_CODE: all cities for the default state ○ CODESET_COUNTY: all counties for the default state ○ CODESET_FACILITY_ALL: all facilities (except manual facilities) ○ CODESET_INVESTIGATION_STATUS_ALL: all investigation status ○ CODESET_LPHU: all LPHU ○ CODE_OUTBREAK: all active outbreak ○ CODESET_REGION: all regions ○ CODESET_REPORTABLE_CONDITION_ALL: all active reportable condition.
Options / Default	Check if you want the option to be the default value.
Options / Hide/ Del	<p><u>If Custom is selected in the Value Set:</u></p> <ul style="list-style-type: none"> ● If the question has not been in production, you can delete the option by clicking the trash icon. ● If the question has been promoted to production, you can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed. <p><u>If a predefined Value is selected in the Value Set:</u></p> <ul style="list-style-type: none"> ● You can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed.
Options / Code	<p>Database Code for the selection option (used in the database). To make the Database more efficient try to use a 1 to 3 characters code. Example: U for Unknown, Y for Yes This is disabled when Value Set is not Custom (or Questions is in production).</p>
Option / Display	<p>Option to display to the user. Maximum Number of characters: 70</p>

To enter more than one options:

- Under the Code column, enter the code
- Press Tab
- Enter the display
- Press Tab and a new line will appear.

There is no limit on the number of options.

Note: When promoted to production you will no longer be able to:

- Delete an option
- Change the Code

You will be able to:

- Hide the option (Will be hidden in forms where the option was not selected)
- Change the Display
- Change the default option

6.4.4 Checkbox Question

A Checkbox Question is a Question where the user can answer by checking or unchecking a checkbox. It is equivalent to a Yes/No Dropdown Question.

Add Form Element

✕

Element Type

Check Box Question

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">N/A</div>	Cell Spanning <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">Yes</div>	Label Location <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">Right next to Checkbox</div>
--	---	---

Check Box Question Properties

Default Value

Not Checked

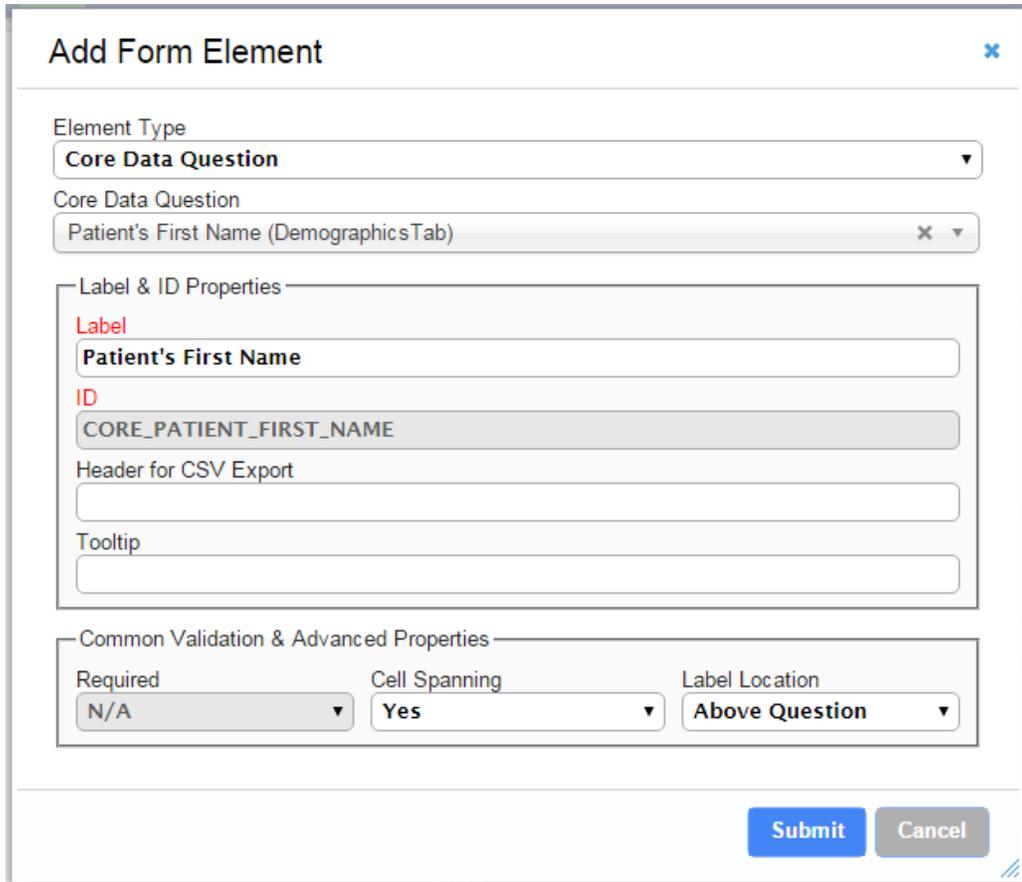
Submit

Cancel

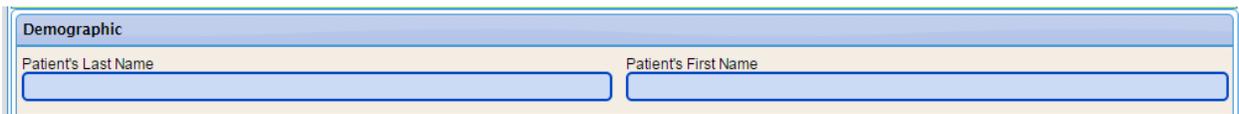
If you want the check box to be checked by default, set Default Value to **Checked**. Otherwise, set it to **Not Checked**.

6.4.5 Core Data Question (New in Feb 2016 Release)

A Core Data Question is a Question that is already part of the investigation. It can be answered when it is defined (example: Patient First Name in the Demographic Tab). Once included in the Form, you will be able to view the answer but will not be able to edit it. It will appear in Blue.



Example of Patient's Last Name and First Name added to a form:



6.4.6 Label Form Element (New in Feb 2016 Release)

A **Label** Form Element type is just a way to add some read only free text or label in a cell. It is mainly used within tables.

Add Form Element ✕

Element Type
Label ▼

Label & ID Properties

Label

Tooltip

Common Validation & Advanced Properties

Cell Spanning
Yes ▼

Label Properties

Text Centered Horizontally **No** ▼ Cell Height (px)

Submit **Cancel**

Definition:

Text Centered Horizontally	By default the text is aligned to the left of the cell. You will be able to center it horizontally. Generally, Column Table Labels will be centered Horizontally where Table Row Labels will not be. The default value is No .
Cell Height (px)	Increase this number to force the header to be bigger. Valid values are from 1 to 50. Default is 20 .

Example of using Labels:

You can use Label within a Table Form Element (See Table Form Element):

Table		
	Date	Where
Location 1	<input type="text"/>	<input type="text"/>
Location 2	<input type="text"/>	<input type="text"/>

The data entry form will look like this:

Table		
	Date	Where
Location 1		
Location 2		

6.4.7 Read Only Text Form Element (New in May 2016 Release)

A **Read Only Text** Form Element type is just a way to add some multitext read only free text in a cell.

Add Form Element ✕

Element Type

Common Validation & Advanced Properties

Cell Spanning

Read Only Text Properties

Example:

Interview Information	
This is a sample of Read Only Text. It does support Multi-lines	+
+	+

6.4.8 Fieldset Form Element (New in Feb 2016 Release)

A **FieldSet** Form Element type is a way to logically group some elements within a section. You can have FieldSets within FieldSets.

Add Form Element ✕

Element Type
FieldSet ▼

Label & ID Properties

Label

Tooltip

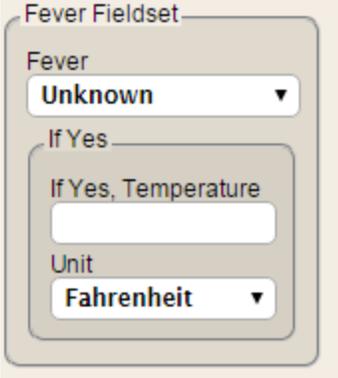
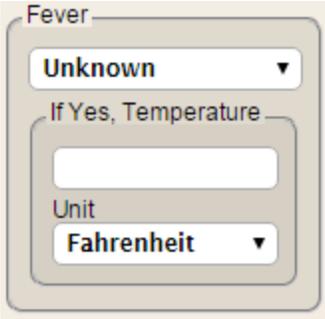
Common Validation & Advanced Properties

Cell Spanning
Yes ▼

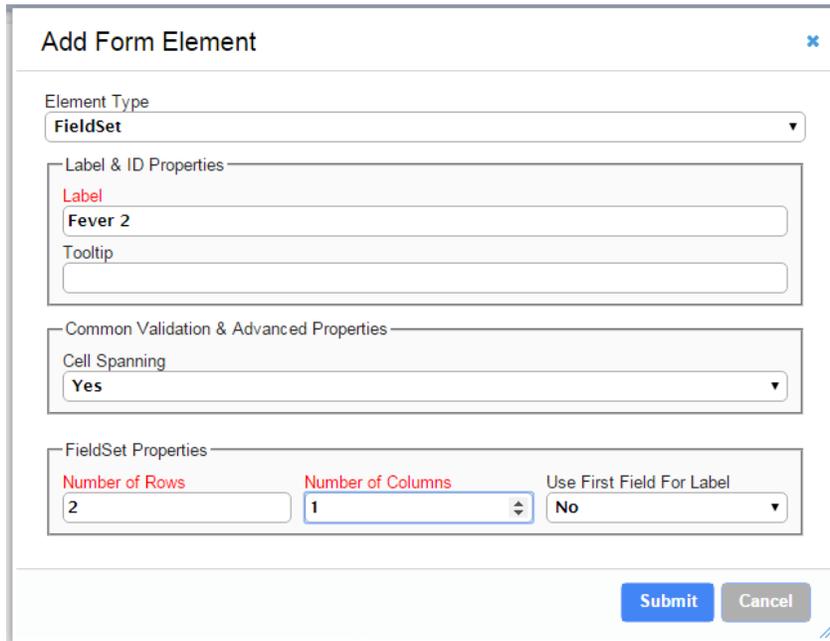
FieldSet Properties

Number of Rows **Number of Columns** **Use First Field For Label** **No** ▼

Definition:

<p>Number of Rows</p>	<p>When creating a fieldset, the form builder will display a virtual table where you can add Form Elements. Number of Rows define the number of rows you would like this table to have. You can change the number at any time. This is a required field.</p>
<p>Number of Columns</p>	<p>When creating a fieldset, the form builder will display a virtual table where you can add Form Elements. Number of Columns define the number of columns you would like this table to have. You can change the number at any time. This is a required field.</p>
<p>Use First Field For Label</p>	<p>In some cases, you will want to move the label of a question to the header of the fieldset. Example:</p>  <p>To move the Fever Label of the Fever question to the Fever Fieldset, edit the fieldset and select Yes for Use First Field For Label. It will then use the label of the question of the first cell (first row, first column). The same applies to temperature. The result will be:</p> 

Example: Field set with 2 rows and one column:



The form builder will then display the following:



Everything that applies to other Form Elements (drag and drop, adding form element to table cells....) will apply to this Field Set. Exception: a fieldset cannot be moved to the left panel.

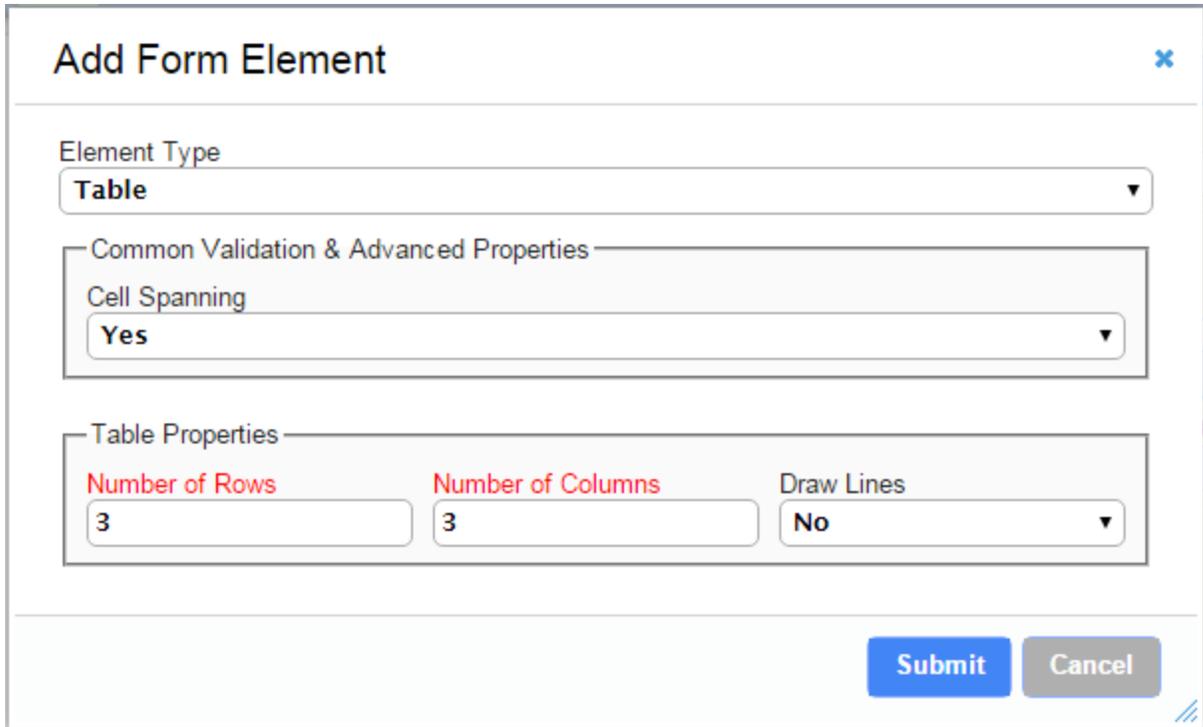
This means that you can add question form elements and even another fieldset within a fieldset:



6.4.9 Table Form Element (New in Feb 2016 Release)

A **Table** Form Element type is just another way to organize Form Elements by adding table within table cell. This means that you can:

- Tables within Section Table Cell
- Tables with Fieldset Table Cell
- Table within another Table Cell



Add Form Element ✕

Element Type
Table ▼

Common Validation & Advanced Properties

Cell Spanning
Yes ▼

Table Properties

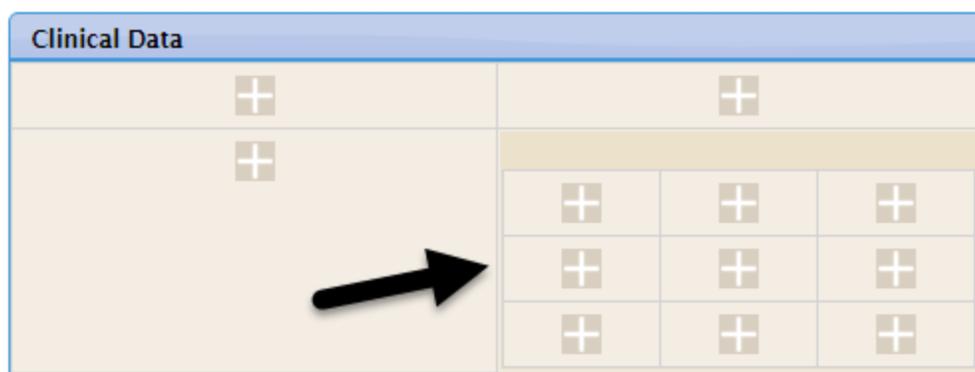
Number of Rows: 3 Number of Columns: 3 Draw Lines: No ▼

Submit Cancel

Definition:

Number of Rows	When creating a Table, the form builder will display a virtual table where you can add Form Elements. Number of Rows define the number of rows you would like this table to have. You can change the number at any time. This is a required field.
Number of Columns	When creating a Table, the form builder will display a virtual table where you can add Form Elements. Number of Columns define the number of columns you would like this table to have. You can change the number at any time. This is a required field.
Draw Lines	By default, Table Cell will not be visible to the end user but if you want them to appear select Yes . This is useful if you want an excel like table to appear on the data entry form.

The form builder will then display the following:



Everything that applies to other Form Elements (drag and drop, adding form element to table cells....) will apply to this Table. Exception: a Table cannot be moved to the left panel.

Excel like Table:

In order to add an excel like Table with lines, select Draw Lines:

Add Form Element ✕

Element Type

Common Validation & Advanced Properties
 Cell Spanning

Table Properties
 Number of Rows
 Number of Columns
 Draw Lines

The form builder will then display the following:

Table		
+	+	+
+	+	+
+	+	+

Next Add Label Form Elements and Questions (where Label Location is Hidden) and you will now have:

Table		
+	Date	Where
Location 1	<input type="text"/>	<input type="text"/>
Location 2	<input type="text"/>	<input type="text"/>

The data entry user will see the following:

Table		
	Date	Where
Location 1	<input type="text"/>	<input type="text"/>
Location 2	<input type="text"/>	<input type="text"/>

6.4.10 Form Element Label Location (New in Feb 2016 Release)

When adding or editing Form Element and for the following Element Type, you will be able to change the Label Location:

- Free Text Question
- Dropdown Question
- Multiselect Question
- Core Data Question

The configuration will appear in the Common Validation & Advanced Properties:

Common Validation & Advanced Properties		
Required	Cell Spanning	Label Location
No	Yes	Above Question

You can set the label location to:

- **Above Question (Default):** The label will be located above the question:

Label Above Question
- **Above Question with Fieldset:** The label will be located above the question but surrounded by a field set:

Label Above Question With Fieldset
- **Hidden:** No label will be displayed (To be used within excel like table)

Note: For Checkbox Questions, it is set to “Right next to Checkbox” and cannot be changed:

Common Validation & Advanced Properties		
Required	Cell Spanning	Label Location
N/A	Yes	Right next to Checkbox

7 Copy and Paste (New in Feb 2016 Release)

When you want to add similar questions where only the label will be different (example Yes/No/Unknown questions), you can use the left panel and the Bulk Add functionality.

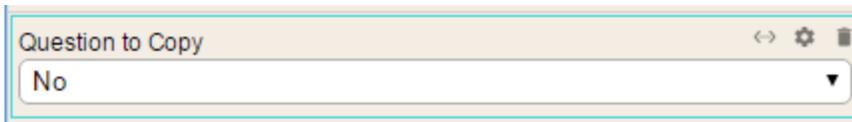
To use the Bulk Add functionality::

1. Click on the  icon on the left panel
2. Set the question parameters the way you want it
3. Click on Bulk Add
4. Press Submit
5. Questions get added to the left panel but do not close. All parameters but the label and ID remain unchanged.
6. You can add more questions by entering a different label.

This is useful, but sometimes you need to add one question that is similar to an existing question. For this scenario, you can use the Copy and Paste function.

To use the Copy and Paste function:

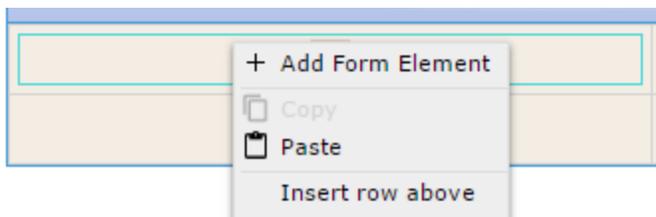
1. Select the Question you want to copy (note the blue highlight around the question)



2. Press Ctrl+C on your keyboard
3. Select an empty Table Cell (note the blue highlight around the question)



Note: You can also use the context menu to copy and paste:



4. Press Ctrl+V on your keyboard. The following Dialog will appear:

Add Form Element (Copy and Paste) ✕

Element Type
Dropdown Question

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required No Cell Spanning Yes Label Location Above Question

Dropdown Question Properties

Value Set
YES_NO_UNKNOWN_VS

Include Blank Option No Automatically Sort Options Yes

Options

Default	Hide/Del	Code	Display
<input checked="" type="checkbox"/>	<input type="checkbox"/>	N	No
<input type="checkbox"/>	<input type="checkbox"/>	U	Unknown
<input type="checkbox"/>	<input type="checkbox"/>	Y	Yes

Submit
Cancel

It is a full copy of the original Question (exception applies). Enter the new label and ID.

Exceptions:

- You cannot Copy and Paste a Table Form Element (New in May 2016 Release)
- You cannot Copy and Paste a Fieldset Form Element (New in May 2016 Release)
- You cannot Copy and Paste a Core Data Question
- Date Validations are not copied over
- Interactions are not copied over

8 Question Interactions (New in Feb 2016 Release)

The following sections will explain how you can define interaction between questions. **Please note that a question can only be part of an interaction if it is within the Form Layout. For this reason you will not be able to remove questions with interaction from the Form Layout.**

8.1 Check boxes state change (New in Feb 2016 Release)

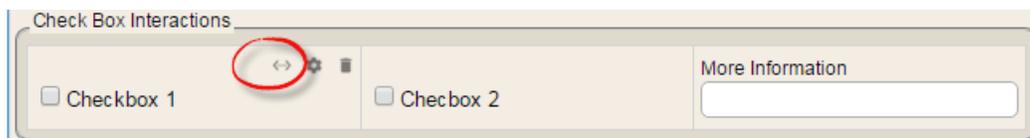
You can enable or disable some questions based on the state of a checkbox. For example, If you look at the following checkboxes:



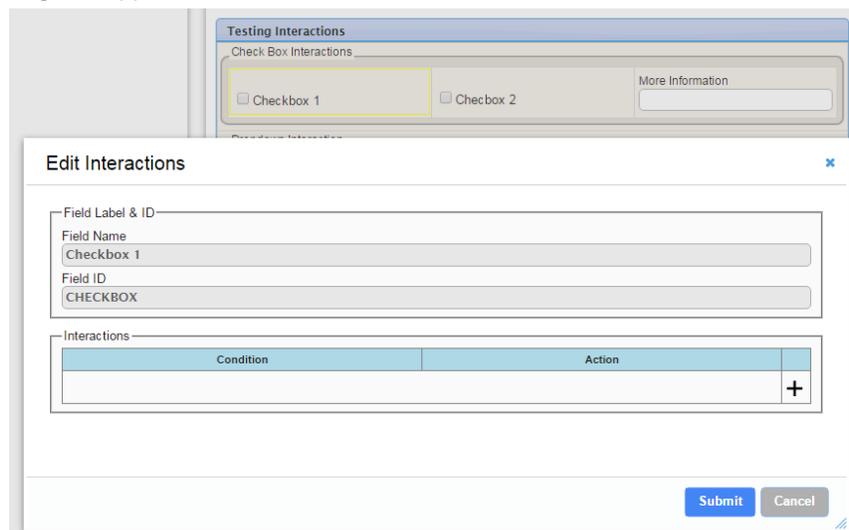
If you want to:

- Enable **Checkbox 2** if **Checkbox 1** is checked
- Enable **More Information** if **Checkbox 2** is checked
- Disable **Checkbox 2** if **Checkbox 1** is not checked
- Disable **More Information** if **Checkbox 1** is not checked
- Disable **More Information** if **Checkbox 2** is not checked

First, click the interaction icon on the **Checkbox 1** Question:



The following Dialog will appear:



Condition	Action

This is where you will define the interaction to disable or enable other questions based on the state of **Checkbox 1**.

Step 1: Add the following interaction:

- Enable **Checkbox 2** if **Checkbox 1** is checked
- Disable **Checkbox 2** if **Checkbox 1** is not checked

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

- If **Checkbox 1** is checked, Enable **Checkbox 2**. Otherwise Disable **Checkbox 2**.

Process:

1. Edit interaction for Checkbox 1.
2. Click on the **+** on the interaction table. A new row will appear:

Interactions	
Condition	Action
If Checked	Enable (Otherwise Disable)
+	

3. The condition is defaulted to **If Checked** and it is what we need (the other option is **if NOT Checked**).
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable (Otherwise Enable)** and **Disable Only**).
5. Select the Question(s) you would like to Enable when the checkbox is Checked. In this case, **Checkbox 2**.
6. The resulted interaction is:

Interactions	
Condition	Action
If Checked	Enable (Otherwise Disable)
	Checkbox 2
+	

Step 2: Add the following interaction:

- Disable **More Information** if **Checkbox 1** is not checked

Before adding the interaction, simplify the interaction:

- If **Checkbox 1** is NOT checked, Disable **Checkbox 2**

Process:

1. Edit interaction for Checkbox 1.
2. Click on the **+** on the interaction table. A new row will appear:

Edit Interactions ✕

Field Label & ID

Field Name

Field ID

Condition	Action	
<input type="text" value="If Checked"/>	<input type="text" value="Enable (Otherwise Disable)"/> <input type="text" value="Checkbox 2"/>	■
<input type="text" value="If Checked"/>	<input type="text" value="Enable (Otherwise Disable)"/> <input type="text" value=""/>	■
+		

3. Enter the interaction by selecting If **Not Checked** for the condition and **Disable Only** for the Action.
4. Select the Question(s) you would like to Disable when the checkbox is Not Checked. In this case, **More Information**.
5. The resulted interaction is:

<input type="text" value="If NOT Checked"/>	<input type="text" value="Disable Only"/> <input type="text" value="More Information"/>	■
+		

Step 3: Add the following interaction:

- Enable **More Information** if **Checkbox 2** is checked
- Disable **More Information** if **Checkbox 2** is not checked

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

- If **Checkbox 2** is checked, Enable **More Information**. Otherwise Disable **More Information**.

Process:

1. Edit interaction for Checkbox 2.
2. Click on the **+** on the interaction table. A new row will appear:

Interactions	
Condition	Action
If Checked	Enable (Otherwise Disable)
+	

3. The condition is defaulted to **If Checked** and it is what we need (the other option is **if NOT Checked**).
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable (Otherwise Enable)** and **Disable Only**).
5. Select the Question(s) you would like to Enable when the checkbox is Checked. In this case **More Information**.

The resulted interaction is:

Interactions	
Condition	Action
If Checked	Enable (Otherwise Disable) More Information
+	

Result:

1. When **Checkbox 1** is not checked, **Checkbox 2** and **More Information** are disabled

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

2. If we check **Checkbox 1**, **Checkbox 2** is enabled and **More Information** stays disabled

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

3. If we check **Checkbox 2**, **More Information** is enabled

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

4. If we uncheck **Checkbox 2**, **More Information** is disabled

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

5. If we check back **Checkbox 2**, **More Information** is enabled again

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

6. If we uncheck **Checkbox 1**, **Checkbox 2** and **More Information** are disabled

Check Box Interactions

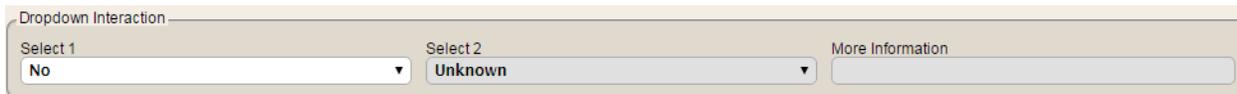
Checkbox 1 Checkbox 2 More Information

Notes:

- When a question is disabled, it goes back to its default value.
- The system will not validate the validity of all the interactions. It will not check for inconsistencies and duplicates.

8.2 Dropdown/MultiSelect select change (New in Feb 2016 Release)

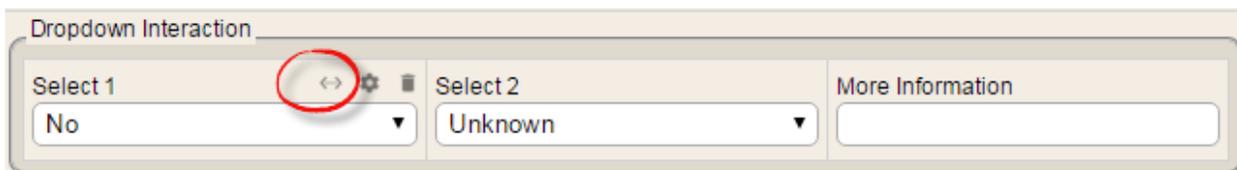
You can enable or disable some questions based on the selection of a dropdown (or multiselect) question. For example, if you look at the following dropdown:



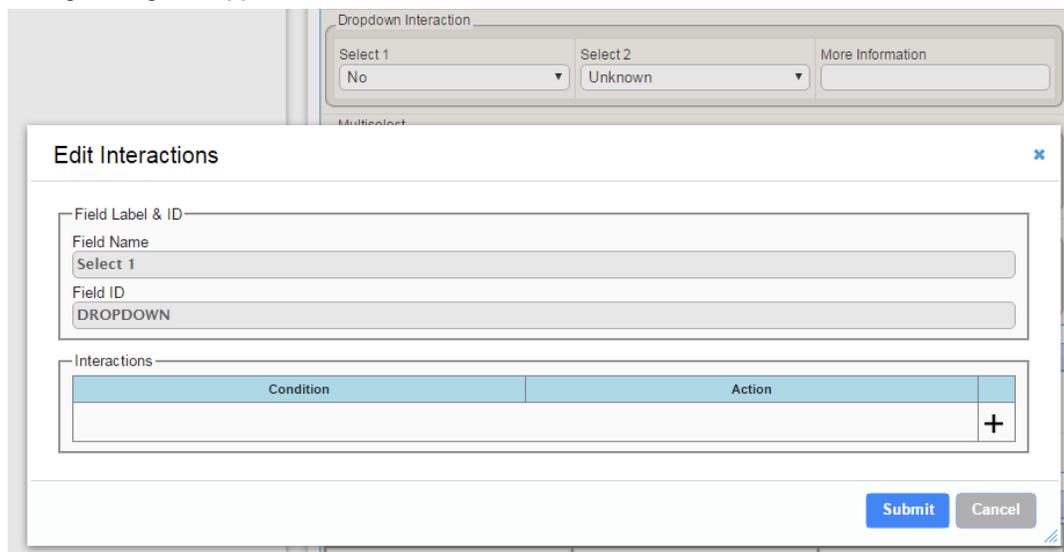
If you want to:

- Enable **Select 2** if **Select 1** selection is **Yes**
- Enable **More Information** if **Select 2** selection is **Other**
- Disable **Select 2** if **Select 1** selection is not **Yes**
- Disable **More Information** if **Select 1** selection is not **Yes**
- Disable **More Information** if **Select 2** selection is not **Other**

First, click the interaction icon on the **Select 1** Question:



The following Dialog will appear:



Condition	Action

This is where you will define the interaction to disable or enable other questions based on the selection of **Select 1**.

Step 1: Add the following interaction:

- Enable **Select 2** if **Select 1** is **Yes**
- Disable **Select 2** if **Select 1** is not **Yes**

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

- If **Select 1** is **Yes** Enable **Select 2**. Otherwise Disable **Select 2**.

Process:

1. Click on the **+** on the interaction table. A new row will appear:

Interactions	
Condition	Action
If Selection has ▼ <input type="text"/>	Enable (Otherwise Disable) ▼ <input type="text"/>
+	

2. The condition is defaulted to **If Selection has** and it is what we need (the other option is **if Selection does NOT have**).
3. Select the option that meets your condition; in this case **Yes**.
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable (Otherwise Enable)** and **Disable Only**).
5. Select the Question(s) you would like to Enable when the the condition is met. In this case **Select 2**.
6. The resulted interaction is:

Interactions	
Condition	Action
If Selection has ▼ Yes × <input type="text"/>	Enable (Otherwise Disable) ▼ Select 2 × <input type="text"/>
+	

Step 2: Add the following interaction:

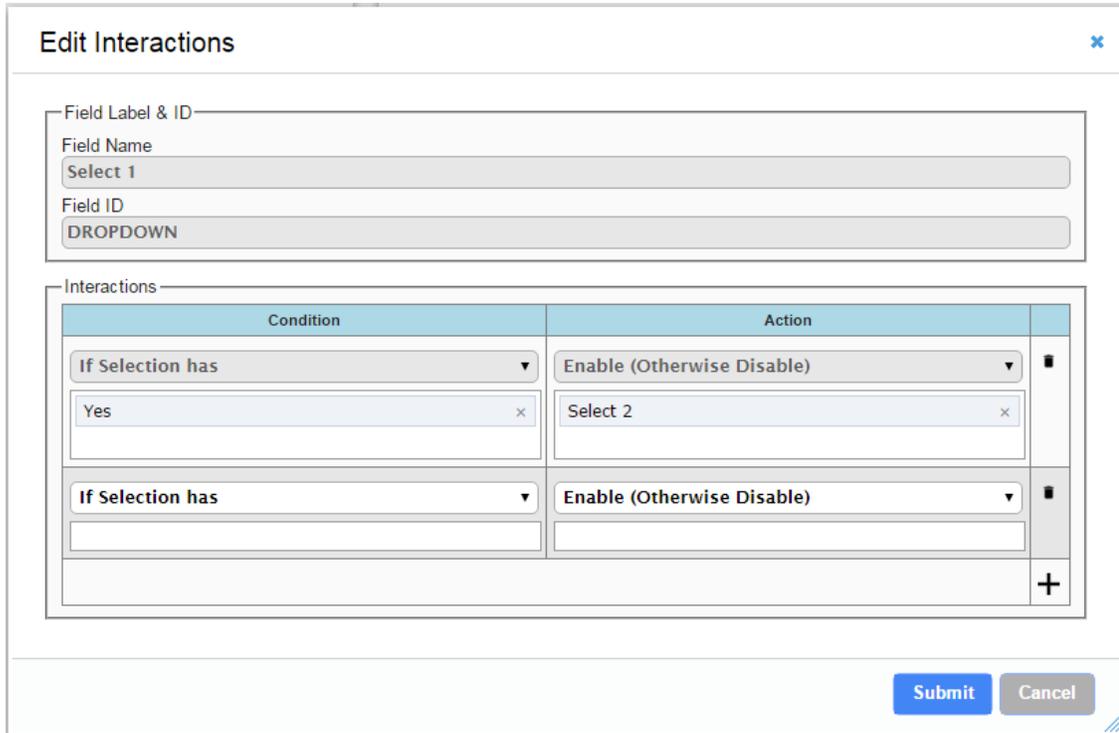
- Disable **More Information** if **Select 1** is not **Yes**

Before adding the interaction, simplify the interaction:

- If **Select 1** selection does NOT have **Yes**, Disable **Select 2**

Process:

1. Click on the **+** on the interaction table. A new row will appear:



2. Enter the interaction by selecting **If Selection does NOT have** for the condition.
3. Select **Yes** for the condition.
4. Select **Disable Only** for the Action.
5. Select the Question(s) you would like to Disable when the condition is met. In this case **More Information**.
6. The resulted interaction is:



Step 3: Add the following interaction:

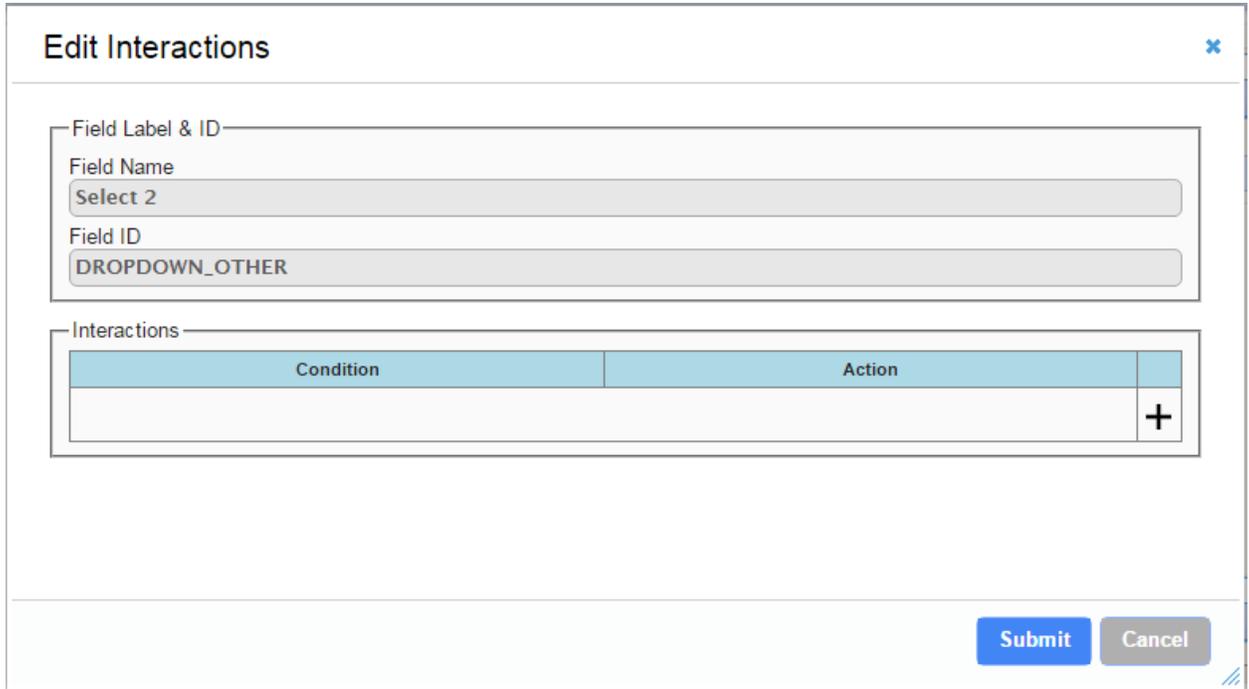
- Enable **More Information** if **Select 2** selection is **Other**
- Disable **More Information** if **Select 2** selection is not **Other**

Before adding the interaction, simplify the interaction:

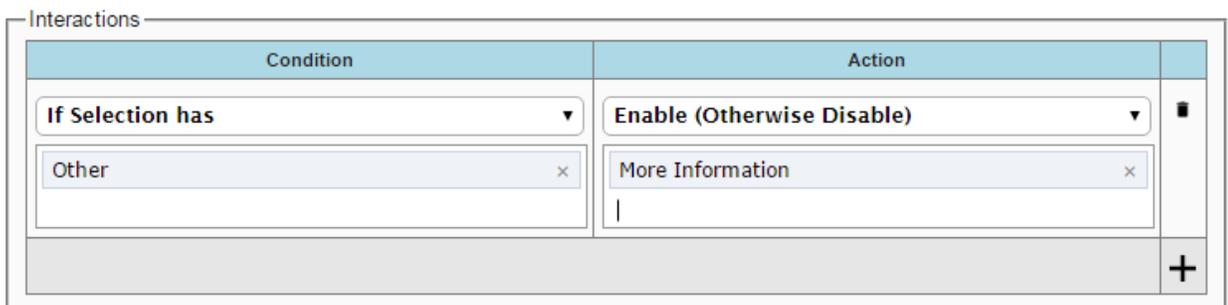
- If **Select 1** selection has **Other**, Enable **More Information**. Otherwise, disable.

Process:

1. Click on the **+** on the interaction table. A new row will appear:



2. Enter the interaction by selecting **If Selection has** for the condition.
3. Select **Other** for the condition.
4. Select **Enable (Otherwise Disable)** for the Action.
5. Select the Question(s) you would like to Disable when the condition is met. In this case **More Information**.
6. The resulted interaction is:



Result:

1. When **Select 1** is not **Yes**, **Select 2** and **More Information** are disabled

Check Box Interactions

Checkbox 1 Checkbox 2 More Information

2. If we select **Yes** for **Select 1**, **Select 2** is enabled and **More Information** stays disabled

Dropdown Interaction

Select 1 Select 2 More Information

Yes Unknown

3. If we select **Other** for **Select 2**, **More Information** is enabled

Dropdown Interaction

Select 1 Select 2 More Information

Yes Other

4. If we select something else than **Other** for **Select 2**, **More Information** is disabled

Dropdown Interaction

Select 1 Select 2 More Information

Yes Option 2

5. If we select back **Other** for **Select 2**, **More Information** is enabled again

Dropdown Interaction

Select 1 Select 2 More Information

Yes Other

6. If we select something else than **Yes** for **Select 1**, **Select 2** and **More Information** are disabled

Dropdown Interaction

Select 1 Select 2 More Information

No Unknown

Notes:

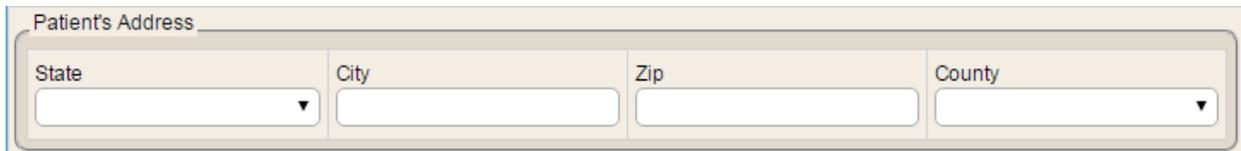
- When a question is disabled, it goes back to it default value.
- The system will not validate the validity of all the interactions. It will not check for inconsistencies and duplicates.

8.3 Address Geographical Mapping Autocomplete (New in May 2016 Release)

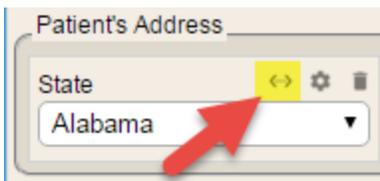
If you want the City/Zip/County to autocomplete as you type. You need to define the following 4 Questions:

- State as **Dropdown Question** and Value Set **State**
- City as **Free Text Question/Plain Text** with at least 70 Maximum number of characters recommended
- Zip Code as **Free Text Question/Zip Code**
- County as **Dropdown Question** and Value Set **CODESET_COUNTY**

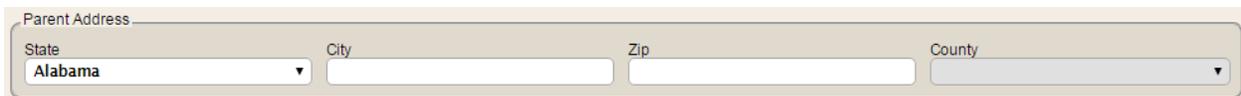
Example:



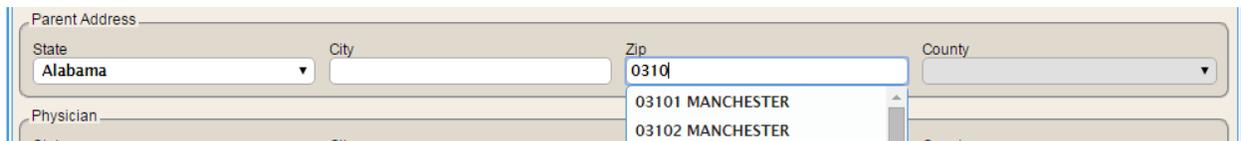
Once this is done edit the State interactions by clicking on the following icon:



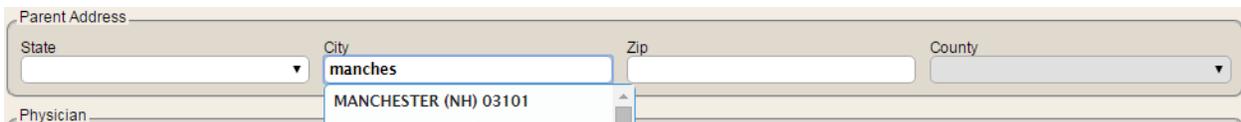
Example of output of Data entry Form:



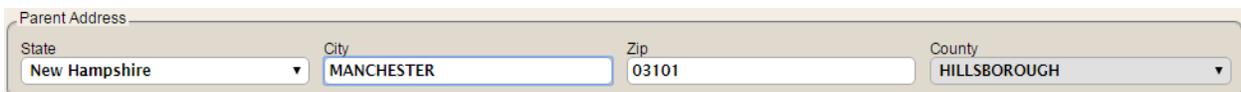
As you enter a Zip code, it will like you all the valid zip code/city options:



As you enter a City, it will like you all the valid zip code/city options:



When the selection is made, all the other fields will be populated with the correct value



The following Dialog will appear:

Edit Interactions ✕

Field Label & ID

Label
State

ID
STATE

Value Change Interactions

Condition	Action	
		+

Address Geographical Mapping Auto-Complete

City Zip County

Because you edited the interaction on a question of type **Dropdown Question** and Value Set **State**, you see an an addition section called Address **Geographical Mapping Auto-Complete**.

If you select the associated question for City, Zip and County then the database entry form include the following logic:

- Autocomplete for City and Zip that will populate all other fields
- County will be disabled for out of state addresses.
- User will be forced to enter a valid Geographical Mapping for in state addresses.

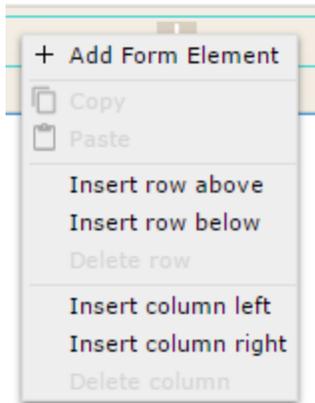
Notes:

- if City, Zip or County is field then the City, Zip and County are required.
- Once the City is within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.
- Once the Zip within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.
- Once the County is within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.

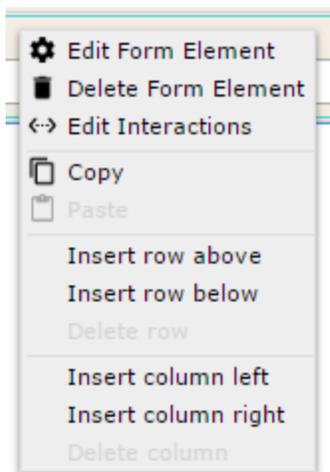
9 Form Builder Context Menu (New in May 2007 Release)

In you right click on any form element, table, fieldset or any empty cell. For example:

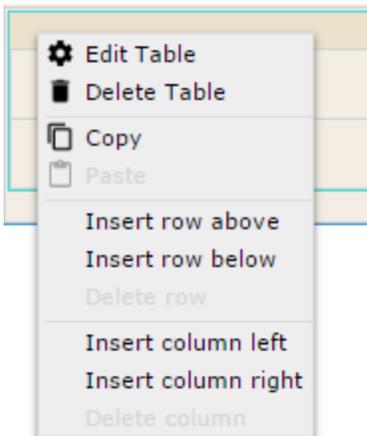
- Empty cell:



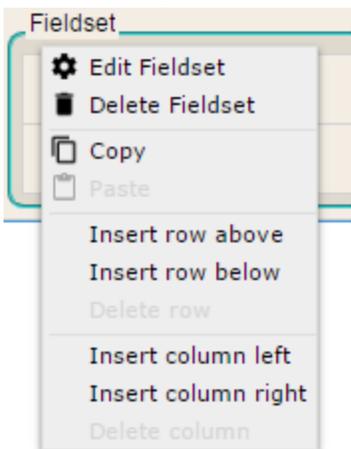
- Form Element:



- Table (Top part):



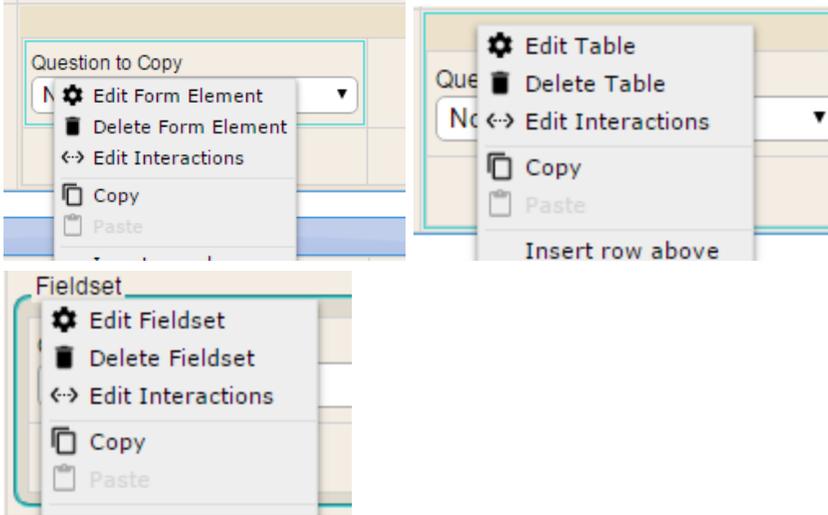
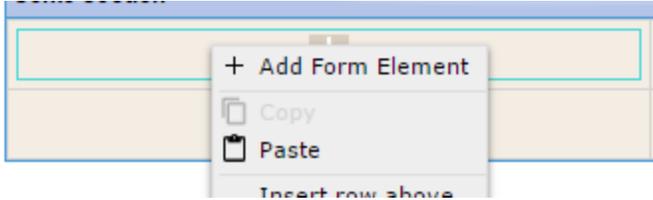
- Field set (Top part):

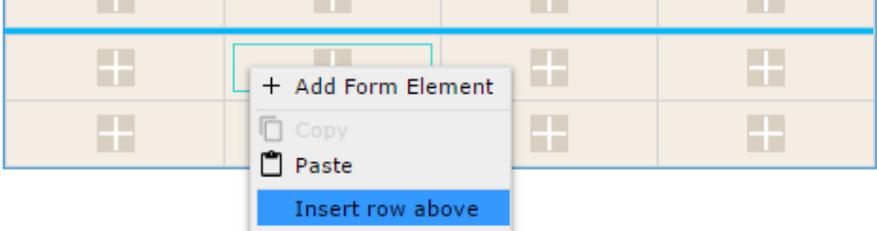
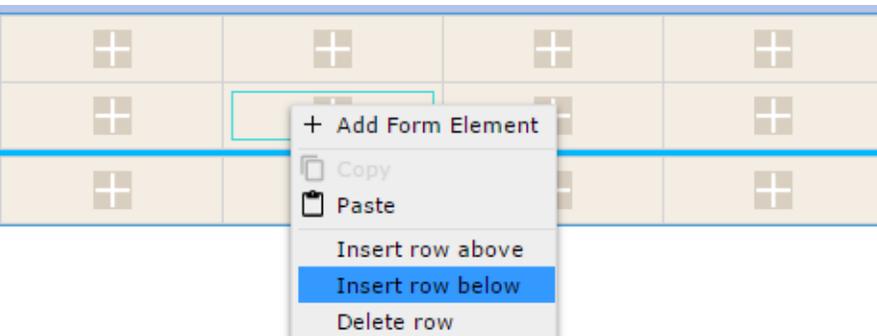
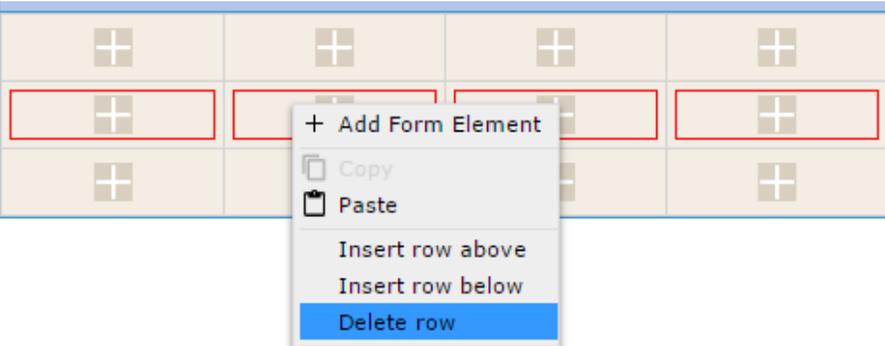


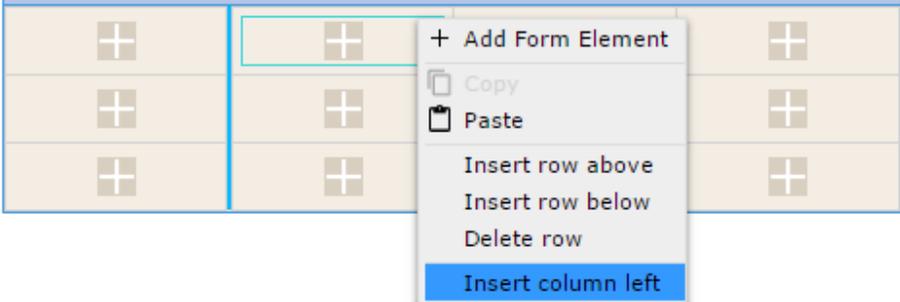
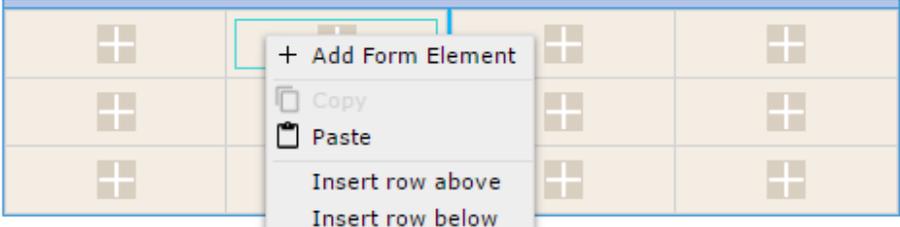
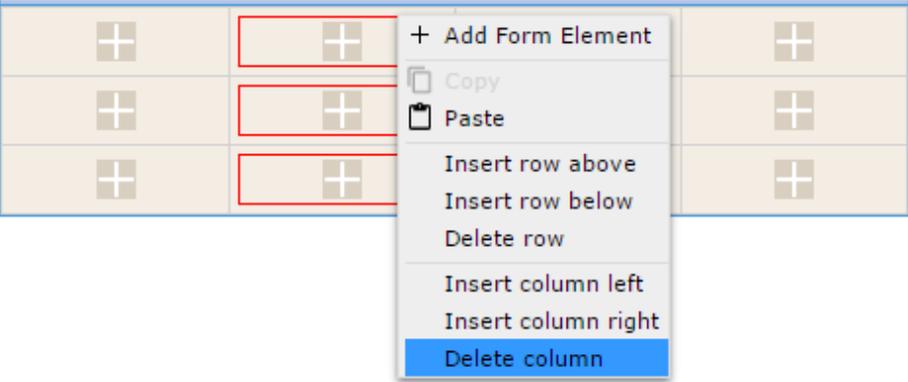
Definitions:

Menu	Description
Add Form Element	Use this context menu if you want to add a form element within the empty cell you right clicked on. It is the equivalent of clicking on the beige icon  within an empty cell. Note: This context menu is available only if you right click on an empty cell.
Edit Form Element	Use this context menu if you want to edit a form element. It is the equivalent of moving your mouse over the form element and click on the edit icon:  Note: This context menu is available only if you right click on a form element (except for table or fieldset).

<p>Delete Form Element</p>	<p>Use this context menu if you want to delete a form element. It is the equivalent of moving your mouse over the form element and click on the delete icon: </p> <p>Note: This context menu is available only if you right click on a form element (except for table or fieldset).</p>
<p>Edit Interactions</p>	<p>Use this context menu if you want to edit the form element interactions. It is the equivalent of moving your mouse over the form element and click on the interactions icon: </p> <p>Note: This context menu is available only if you right click on a form element of type dropdown or checkbox.</p>
<p>Edit Table</p>	<p>Use this context menu if you want to edit a table. It is the equivalent of moving your mouse over the top part of a table and click on the edit icon: </p> <p>Note: This context menu is available only if you right click on the top part of a table</p>
<p>Delete Table</p>	<p>Use this context menu if you want to delete a table. It is the equivalent of moving your mouse over the top part of a table and click on the delete icon: </p> <p>Note: This context menu is available only if you right click on the top part of a table</p>
<p>Edit Fieldset</p>	<p>Use this context menu if you want to edit a fieldset. It is the equivalent of moving your mouse over the top part of a fieldset and click on the edit icon: </p> <p>Note: This context menu is available only if you right click on the top part of a fieldset</p>
<p>Delete Fieldset</p>	<p>Use this context menu if you want to delete a fieldset. It is the equivalent of moving your mouse over the top part of a fieldset and click on delete icon: </p> <p>Note: This context menu is available only if you right click on the top part of a fieldset</p>

<p>Copy</p>	<p>Use this context menu if you to copy a form element, table or fieldset. To better identify the element you are copying will be highlighted in blue. Examples:</p>  <p>This is the equivalent of pressing Ctrl+C Note: This context menu is enable only if you right click a form element, table or fieldset.</p>
<p>Paste</p>	<p>Use this context menu if you to paste a copied form element, table or fieldset to an empty cell. To better identify the empty cell you are pasting to will be highlighted in blue. Examples:</p>  <p>This is the equivalent of pressing Ctrl+V Note: This context menu is enable only if you right click an empty cell and if you did a copy prior.</p>

<p>Insert row above</p>	<p>Use this context menu if you want to insert a row above the row you right clicked on:</p>  <p>Note: A blue line indicator will display as you select the menu to tell you where the line will be added.</p>
<p>Insert row below</p>	<p>Use this context menu if you want to insert a row above the row you right clicked on:</p>  <p>Note: A blue line indicator will display as you select the menu to tell you where the line will be added.</p>
<p>Delete row</p>	<p>Use this context menu if you want to delete the row you right clicked on:</p>  <p>Note: This menu is only enabled all the cell of the selected row are empty.</p>

<p>Insert column left</p>	<p>Use this context menu if you want to insert a column left of the column you right clicked on:</p>  <p>Note: A blue line indicator will display as you select the menu to tell you where the column will be added. This menu will be disabled if you already have the maximum number of columns for that section, table or fieldset.</p>
<p>Insert column right</p>	<p>Use this context menu if you want to insert a column right of the column you right clicked on:</p>  <p>Note: A blue line indicator will display as you select the menu to tell you where the column will be added. This menu will be disabled if you already have the maximum number of columns for that section, table or fieldset.</p>
<p>Delete column</p>	<p>Use this context menu if you want to delete the column you right clicked on:</p>  <p>Note: This menu is only enabled all the cell of the selected column are empty.</p>

10 Form History/Reverting Changes

Every time a change is made, the form is saved automatically and a version number is assigned. For example, when working on version 1 of the form, the second number of the version will increment by one every time the form is saved and will be displayed next to the Form Name:



For more information about how the versions work see [Versioning/Promote to Production Section](#).



If you click on (Form History) you will be able to see the changes that were made:

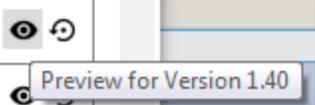
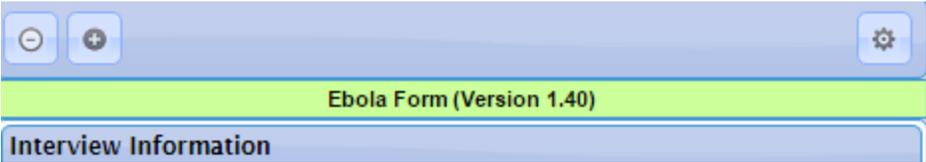
Version	Date	User	Action	
1.43	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_2 To Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y1	
1.42	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_1 To Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y0	
1.41	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_3 To Cell Id: INTERVIEW_INFORMATION_TABLE_X0_Y1	
1.40	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: INTERVIEWER_NAME_LAST_FIRST To Cell Id: INTERVIEW_INFORMATION_TABLE_X0_Y0	
1.39	10/02/2015 13:37	Bernard, Bruno	Moved Field Id: FIELD_1 To Question List	
1.38	10/02/2015 13:30	Bernard, Bruno	Moved Field Id: FIELD_1 From Cell Id: CONTACT_INFORMATION_TABLE_X0_Y1 To Cell Id: CONTACT_INFORMATION_TABLE_X0_Y0	
1.37	10/02/2015 13:29	Bernard, Bruno	Moved Field Id: FIELD_1 From Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y1 To Cell Id: CONTACT_INFORMATION_TABLE_X0_Y1	
1.36	10/02/2015 13:29	Bernard, Bruno	Moved Field Id: FIELD_3 To Question List	
1.35	10/02/2015 13:20	Bernard, Bruno	Moved Field Id: INTERVIEWER_NAME_LAST_FIRST To Question List	

It will display the following as a table:

- Version
- Date/Time
- User
- Action (What was changed)

At the end of every row there are 2 icons:

Definitions:

	<p>This is the preview button.</p> <p>Hover your mouse over the preview button to tell you which version you are going to preview:</p>  <p>The preview window will also tell you the version you are previewing:</p> 
	<p>This is the revert button.</p> <p>Hover your mouse over the revert button to tell you which version it is going to revert to:</p> 

11 Versioning/Promote to Production Section

11.1 Preliminaries

When creating a new Form, the Form version will be set to **0** and the Production field is set to **NO**:

Form Management						Import	New Form			
Show/Hide Show 10 entries						First	Previous	1	Next	Last
ID	Version	Name	Tab Name	Production						
EBOLA_FORM	0	Ebola Form	Ebola	NO						
Showing 1 to 1 of 1 entries						First	Previous	1	Next	Last

This indicates that the form is not available to be associated with a disease yet. In order to make the form available, it needs to be promoted to production.

Before promoting a form to production, make sure your form has all the questions that need to be in the form and clear of mistakes.

It is recommended to use the Form Preview to review the form before promoting it to production:



This will show you the form as the user would see it when doing data entry:

Ebola Form (Version 1.98)

Interview Information

Interviewer Name (Last, First)

State-Local Health Department

Business Address (Street)

City

State

Zip

County

Phone Number

Email address

Ebola Case Information (Case associated with Contact)

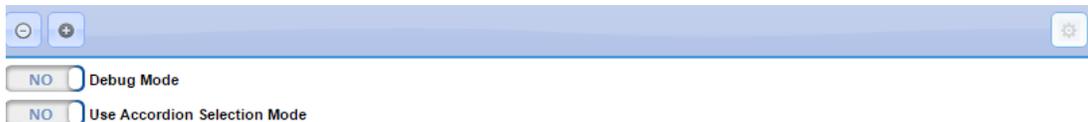
At the time of this report, is the patient

Date of illness onset of patient

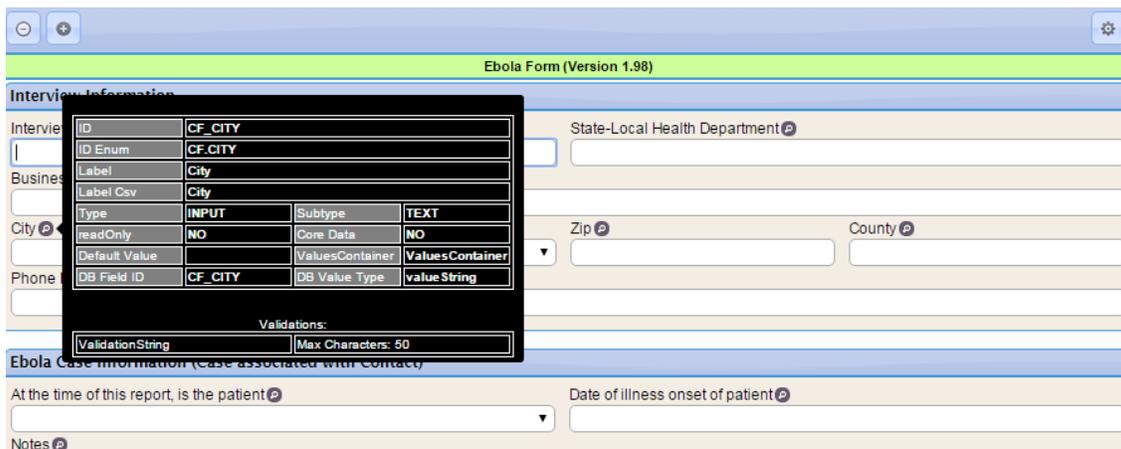
Notes

Contact Information

If you have the embedded form Debug Privilege, you can put the Form in Debug mode and it will display more details about the Form Elements. To do so, click the top right Form Setting icon and set the Debug mode to Yes.

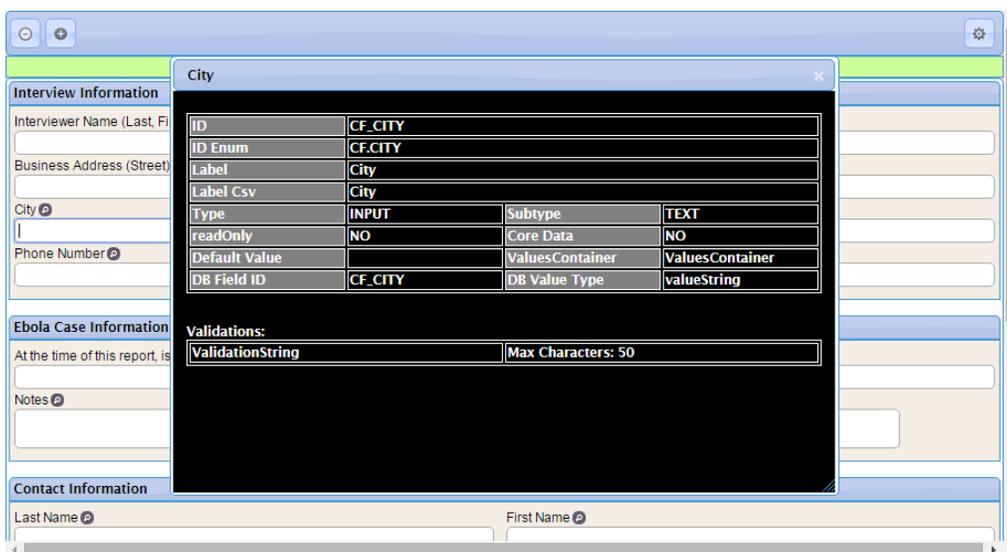


If you press the shift key while hovering over these icons,  it will show you all the information about the field as a tooltip:



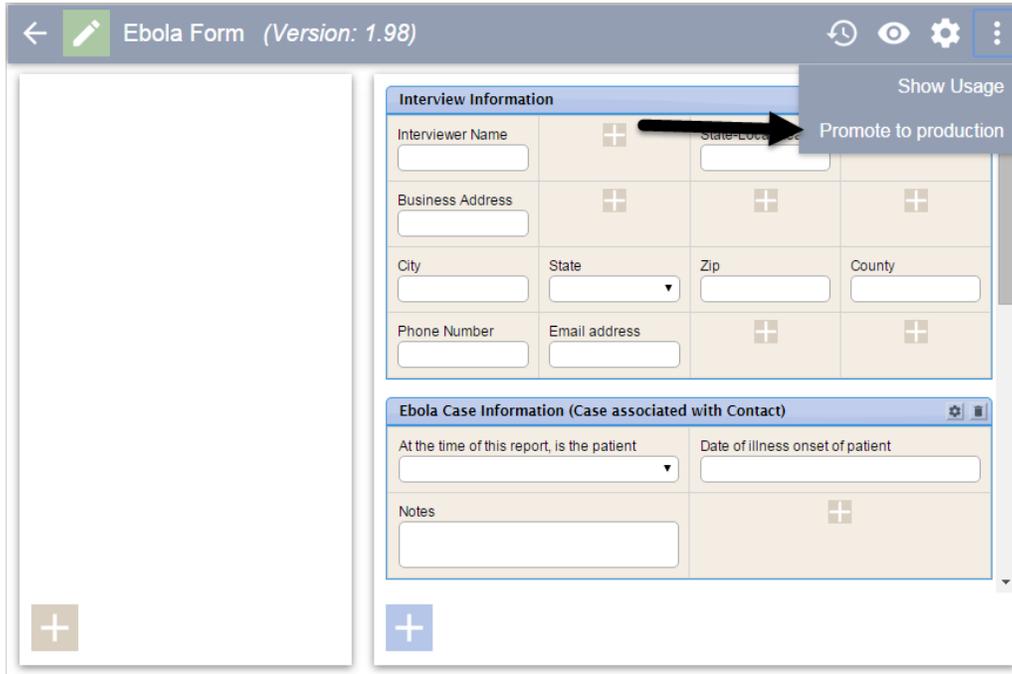
Verify that the Validation is correct and that the Label for the CSV is clear. For example, the Label CSV should say Business Address City.

You can also click  and the same information will appear:



11.2 Promote to Production

When you are ready to promote your form to production, click the Action Menu and then Promote To Production:



The screenshot shows the 'Ebola Form (Version: 1.98)' editor. On the right side, there is a form with two sections: 'Interview Information' and 'Ebola Case Information (Case associated with Contact)'. The 'Interview Information' section includes fields for Interviewer Name, Business Address, City, State, Zip, County, Phone Number, and Email address. The 'Ebola Case Information' section includes a dropdown for 'At the time of this report, is the patient', a text field for 'Date of illness onset of patient', and a 'Notes' field. An action menu is open over the form, showing 'Show Usage' and 'Promote to production' options. An arrow points to the 'Promote to production' option.

You will be prompted to confirm with the following Dialog box:



The dialog box contains the following text:

Are you sure you want to Promote this Form to Production?

Once in Production, you may not be able to revert some of the changes you've made

At the bottom right, there are two buttons: 'Yes' (green) and 'No' (red).

Click Yes and if there are no errors, the following message will appear::



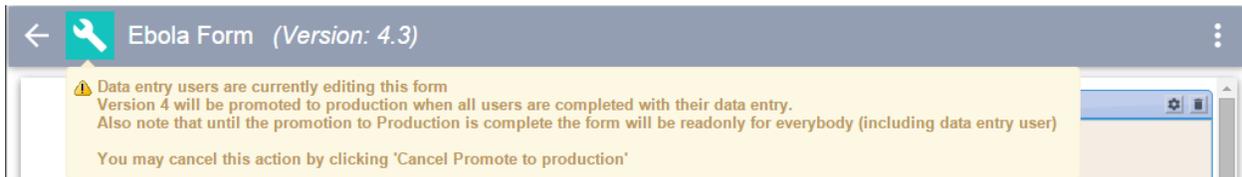
The screenshot shows the 'Ebola Form (Version: 2.1)' editor. A green notification banner at the top right of the editor area displays the message: 'Version 1 was successfully promoted to production'.

In the examples above, the form version changed from 1.98 to 2.1. Promoting the form to production made version 1 the final version for these first set of changes and version 2 will represent the second set of changes to the form if needed after it has been promoted to production.

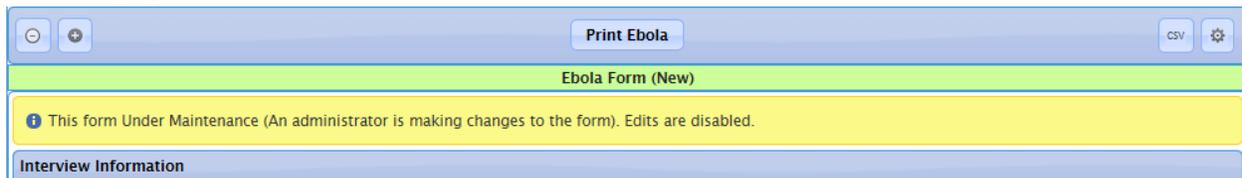
11.3 Promotion to Production (Special Scenario)

This section will describe functionality for when a data entry user is currently performing data entry in a Form while you are trying to Promote a new version of the Form to Production.

If you select to promote a form to production while it is being used for data entry, you will receive a warning that the promotion to production was queued until all data entry users have completed using the form.



In addition, if data entry user tries to access this Form form while it is being edited, the following message will be displayed:



When the last user is done with data entry:

- The Form will be promoted to production automatically
- All users will be able to access the Form for Data entry
- An email will be sent to the administrator to notify them that the Form was promoted to production

Note:

- You can cancel the promotion to production at any time by clicking the Action Menu then Cancel Promote to Production:

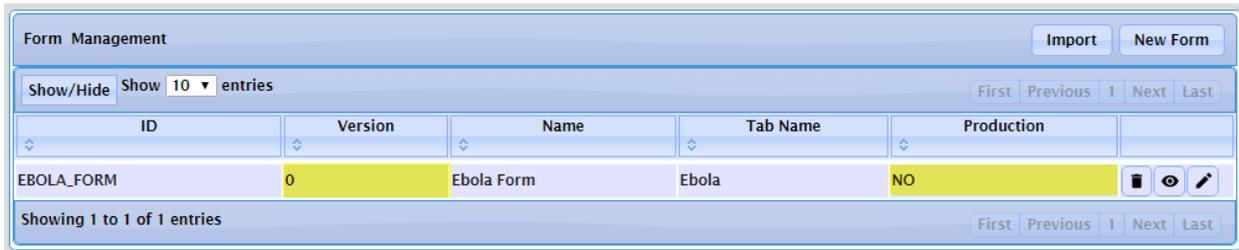


- You can view who is currently using this form by clicking Show Usage

11.4 Versioning

Versioning consist of 2 numbers in the following format: X.Y. The “X” is the major version of the form and the “Y” is the minor version that corresponds to a change that you’ve made (i.e., every time you add/modify/delete a Form Element, reorganize Form Elements or add/modify/delete sections this number will increment by one).

When you create a new form, the Form Management Listing will Display version **0** and the Production field is set to **NO**:



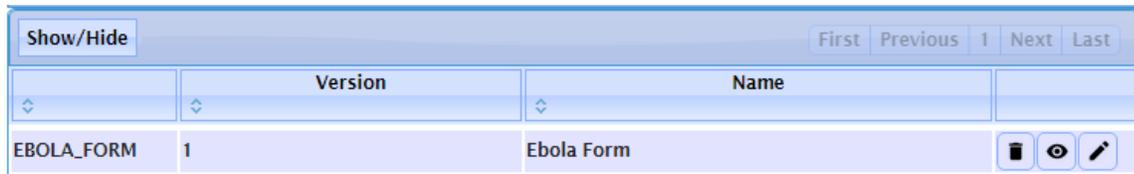
ID	Version	Name	Tab Name	Production
EBOLA_FORM	0	Ebola Form	Ebola	NO

Clicking Edit will edit the next version,Version 1. The following header will appear in the form builder:



Any changes you make will increment that version by 1 (i.e., 1.2 then 1.3, etc.). This also means that when you click edit from the Form Management, you are working on a draft of Version 1.

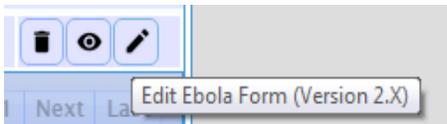
The tooltips will show information for version 1 of the Ebola Form in the example below:



ID	Version	Name
EBOLA_FORM	1	Ebola Form



Preview will show you the production version of the form.



Edit will open the next version of the form for editing. Once a version has been promoted to production, it can no longer be edited. Any edits made will be part of the next version of the form (ie: version 2.X in this example).

12 Editing a Form that was Promoted to Production

Changes can be made to a form after it has been promoted to production.

Edits can include:

- Changing the order of the Form Elements/layouts
- Changing the order of the sections
- Adding Form Elements
- Deleting any newly added Form Elements (unless they are part of an interaction)
- Adding options to a dropdown (When ValueSet is set to Custom)

To retain data already entered in the form when the previous version was in production, certain edit restrictions are in place:

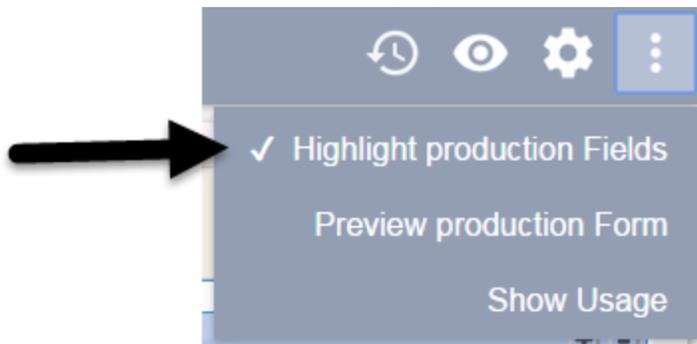
- You will not be able to change certain settings in a Form Element of Type Question:
 - For example, if a text question was limited to 100 characters, you will not be able to change it to 90. You will be able to increase the number as it will not affect data that may already be entered in the question .
- You will not be able to delete:
 - Any questions that were promoted to production
 - Any dropdown or MultiSelect options that were promoted to production

Note:

- You will be able to change the data validation in any way you want
- You will be able to change the question interactions (Disable/Enable based on condition) in any way you want

12.1 Highlight production Questions

To help distinguish newly added questions from questions that were used when the form was in production, click the Action Menu and select Highlight production Questions:

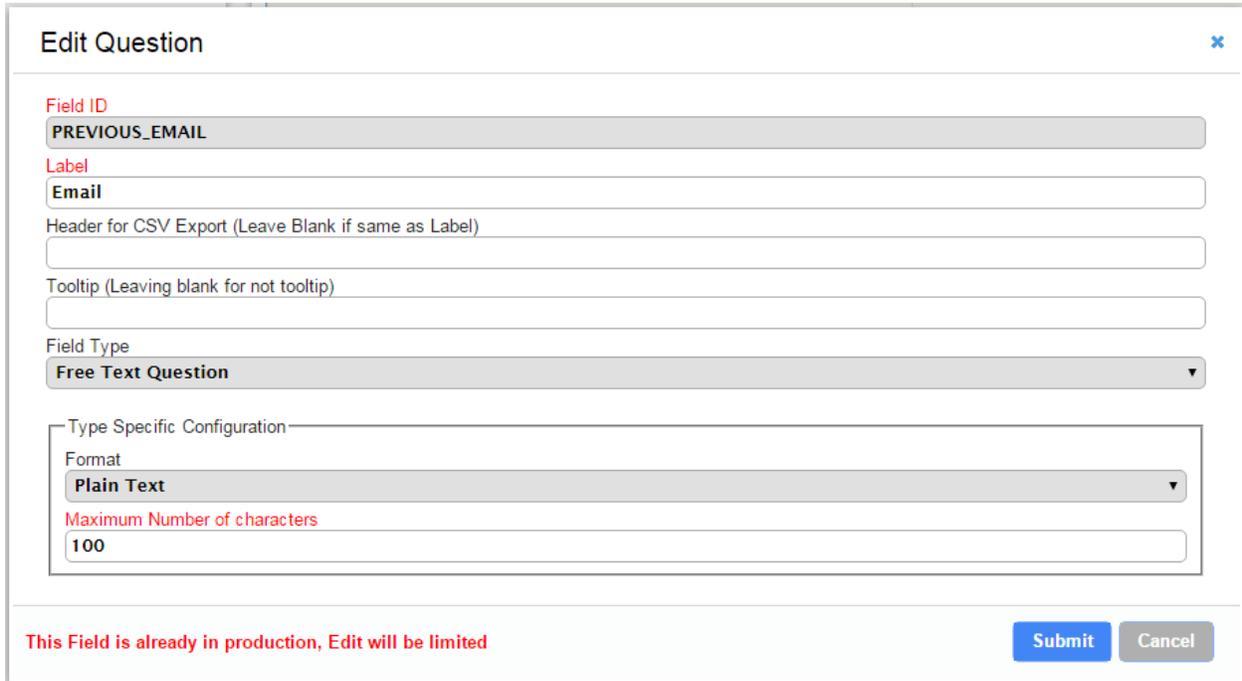


Fields promoted to production will show in pink.

<p>Email</p> <input style="background-color: #fce4ec;" type="text"/>	<p>New Question</p> <input type="text"/>
--	--

12.2 Editing Existing Free Text Question

When editing a Text question that was promoted to production, a warning in red will appear at the bottom informing you that editing capabilities will be limited:



The screenshot shows the 'Edit Question' form with the following fields:

- Field ID:** PREVIOUS_EMAIL
- Label:** Email
- Header for CSV Export (Leave Blank if same as Label):** (Empty)
- Tooltip (Leaving blank for not tooltip):** (Empty)
- Field Type:** Free Text Question
- Type Specific Configuration:**
 - Format:** Plain Text
 - Maximum Number of characters:** 100

At the bottom of the form, a red warning message states: "This Field is already in production, Edit will be limited". There are 'Submit' and 'Cancel' buttons.

You can edit the following:

- Label
- Header for CSV
- Tooltip
- For Format Type Plain Text: Maximum Number of characters can only be edited if the new number is higher than what was in production. If you enter a number lower than what was defined for production, the system will not let you change the number and will display an error when submitting.



The screenshot shows the 'Edit Question' form with an error message displayed in a red box:

Error: You must correct the following error(s) before proceeding:

- Maximum Number of characters cannot be less than 100 (Current Production Value)

- For Format Type Plain Text (Multilines): Initial Number of Lines:

You cannot edit the following:

- Field Type
- Format

12.3 Editing Existing Dropdown/Multi Select Question

When editing a Dropdown/Multi Select question that was promoted to production, a warning in red will appear at the bottom informing you that editing capabilities will be limited:

Edit Question
✕

Field ID

Label

Header for CSV Export (Leave Blank if same as Label)

Tooltip (Leaving blank for not tooltip)

Field Type

Type Specific Configuration

Value Set

Include Blank Option

Options

Default	Hide/Del	Code	Display
<input type="checkbox"/>	<input type="checkbox"/>	C	Confirmed
<input type="checkbox"/>	<input type="checkbox"/>	P	Probable
<input type="checkbox"/>	<input type="checkbox"/>	U	Unknown

This Field is already in production, Edit will be limited

You can edit the following:

- Label
- Header for CSV
- Tooltip
- Adding new options (for Value Set Custom Only)

You cannot edit the following:

- Field Type
- Delete options promoted to production

Editing options:

- You will not be able to delete any option that was promoted to production but you can hide them instead. Any form that was completed using that option will still display the option; however, the option will not be available for data entry in the any new versions of the form if the option was not selected. This is the way to delete the option.
- You can change the Display Text of any option (including the ones promoted to production).
- You can add new options. You will not have the same editing limitations for any new options added. (See example below for New Option 1 & 2):

Edit Question ✕

Field ID

AT_THE_TIME_OF_THIS_REPORT_IS_THE_PATIENT

Label

At the time of this report, is the patient

Header for CSV Export (Leave Blank if same as Label)

Tooltip (Leaving blank for not tooltip)

Field Type

Dropdown Question ▼

Type Specific Configuration

Value Set

CUSTOM ▼

Include Blank Option

Yes (Default Value) ▼

Options

Default	Hide/Del	Code	Display
<input type="checkbox"/>	<input type="checkbox"/>	C	Confirmed
<input type="checkbox"/>	<input checked="" type="checkbox"/>	O1	New Option 1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	O2	New Option 2
<input type="checkbox"/>	<input type="checkbox"/>	P	Probable
<input type="checkbox"/>	<input type="checkbox"/>	U	Unknown

This Field is already in production, Edit will be limited

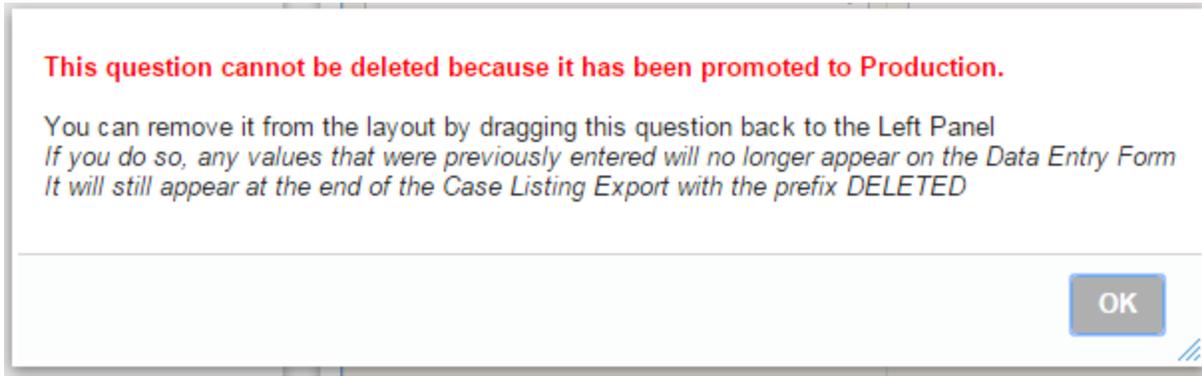
Submit

Cancel

Confirmed/Probable/Unknown are options that were in production so cannot be deleted, but can be hidden from display.

12.4 Deleting a question that was promoted to production

If you try to delete a question that was promoted to production, you will get the following error:



To remove the question from the form, drag it to the left panel. It will no longer show on the data entry form. The question will still be part of the export of the form. Removed questions are placed in the last column of the export.

Note: You can delete Core Data Questions that were promoted to production except for the Form of Type Outbreak Event.

13 Disabling or Deleting a Form

You will not be able to delete a Form when:

- The Form was associated to a disease and data entry users entered data in this form
- The Form is associated with a disease

You will be able to delete a Form when:

- The Form was associated to a disease but no data entry user saved data
- The Form was never associated to a disease (even if the Form was promoted to production)

You can inactivate a form if it cannot be deleted. Go to Form Settings:



Set Active to No:

Form Settings ✕

Form ID
EBOLA_FORM

Form Name
Ebola Form

Tab Name
Ebola

Tab Name (Short)
E

Active
Yes ▼

Submit
Cancel



When a Form is marked as inactive:

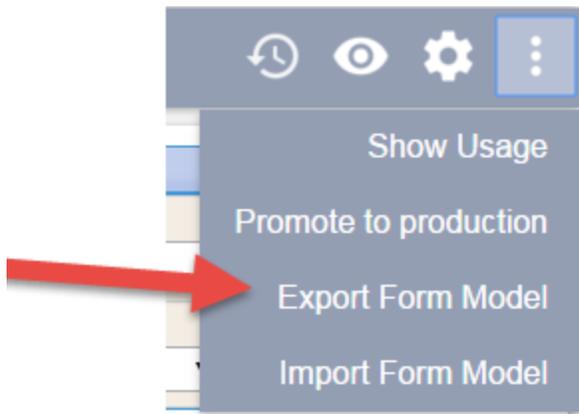
- It is not available to be associated with any disease
- If it is already associated to a disease, it will remain associated until the association has been removed.

14 Exporting/Importing Form Model

14.1 Exporting Form Model

If you have a form you want to export from to reuse on another system (or another Form within the same system):

- Go to the Action Menu
- Select Export Form Model



- The model will then be downloaded on your system.
 - The file Name will be the Form ID and the version
 - The extension is CF
 - Example: EBOLA_FORM.1.36.cf

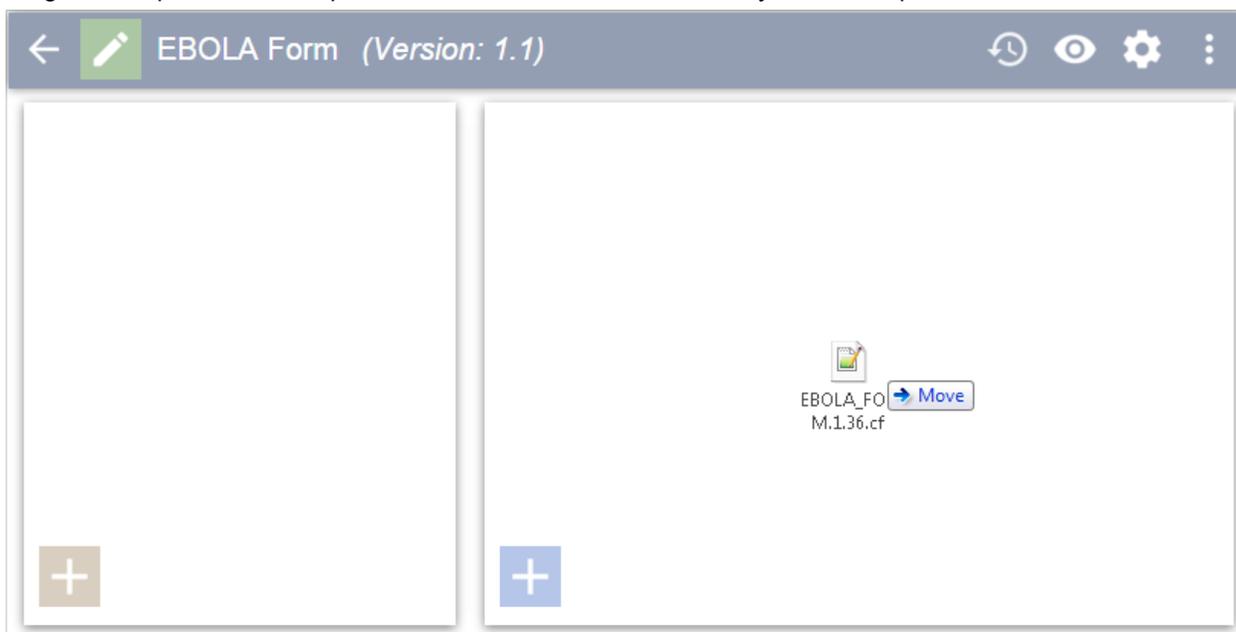
Note: Do not make any edit on this file.

14.2 Importing Form Model

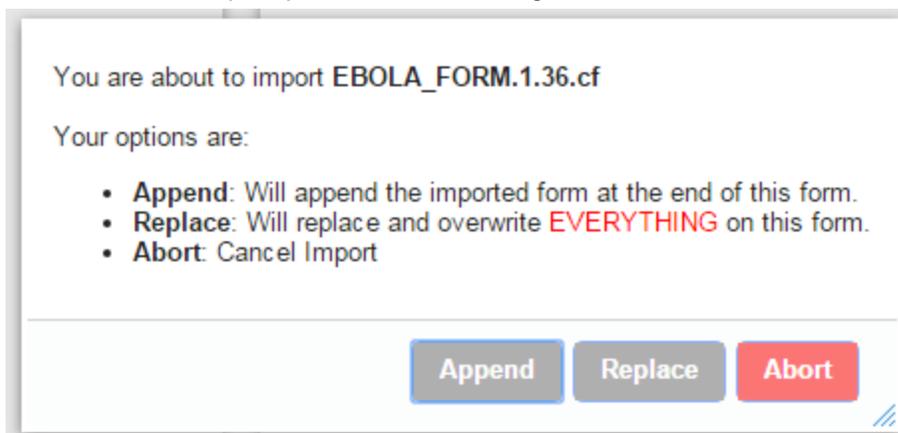
You can import a Form Model on any existing Custom Form (some restriction apply when the form has been promoted to production) or you can create a new empty Custom Form and import a Form Model (this can be used when you want to make a create a Variant of an existing Form).

There are 2 ways to import:

1. Drag and Drop the File to import on the Form Builder for the form you want import:

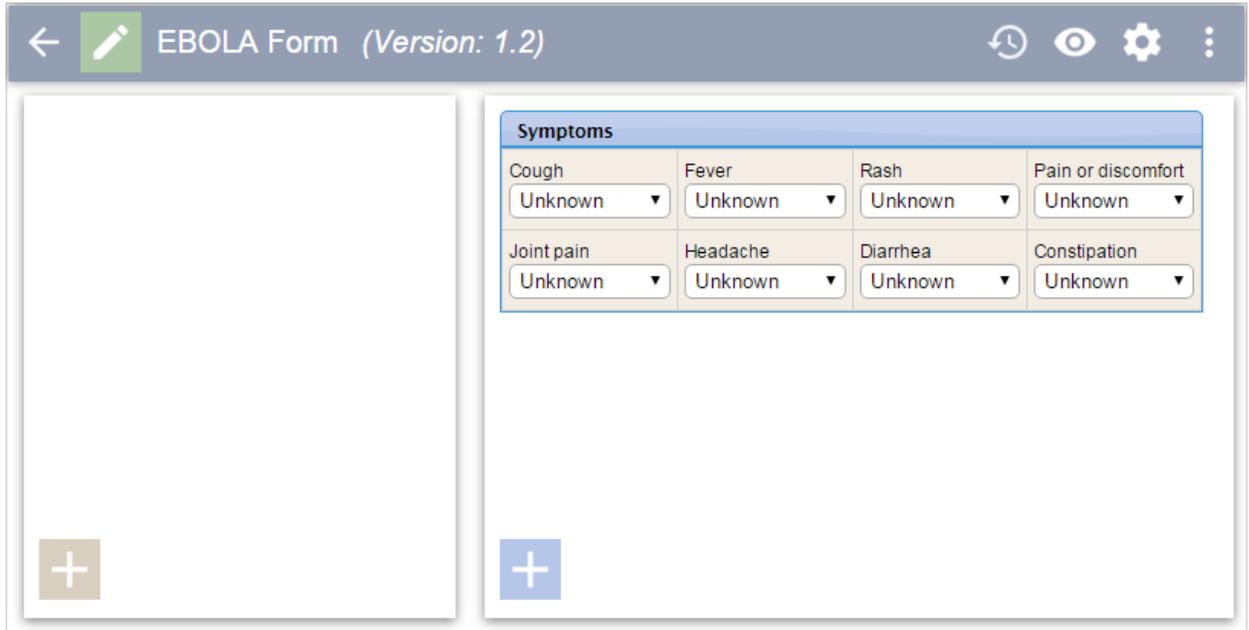


2. You will be then be prompted with the following:



- a. if you select Append, the imported Form Model will append after the last Section you currently have
- b. if you select Replace, the imported Form Model will replace everything you have.
- c. if you selection Abort, the import will be aborted.

3. if you select Append or Replace, then you will see the imported Model:



The screenshot shows a software interface for an "EBOLA Form (Version: 1.2)". The interface is split into two main panels. The left panel is mostly empty with a light blue background and a small white plus sign in a blue square at the bottom left. The right panel contains a table titled "Symptoms".

Symptoms			
Cough	Fever	Rash	Pain or discomfort
Unknown ▼	Unknown ▼	Unknown ▼	Unknown ▼
Joint pain	Headache	Diarrhea	Constipation
Unknown ▼	Unknown ▼	Unknown ▼	Unknown ▼

At the bottom of the right panel, there is a small white plus sign in a blue square.

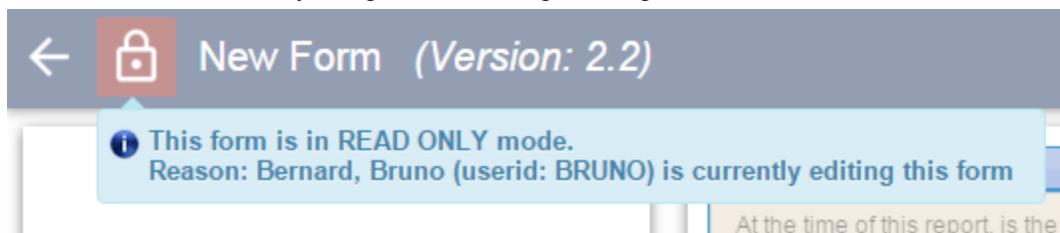
Note:

- If the form was promoted to production, you will not be able to Replace the full Form. Only Append will be available
- If you select Append, the Form Builder will verify that the Form Element ID you are imported are unique and do not conflict with your current Form Element ID

15 Others

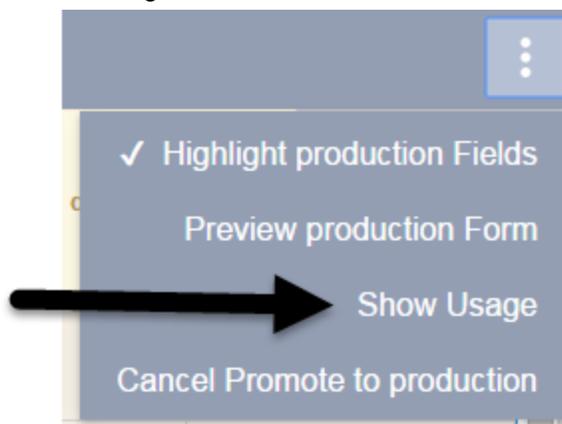
15.1 Form Lock for Edit

Only one user at a time can edit the same form. If a user attempts to edit a Form currently being edited by another administrator, they will get the following message:



15.2 Usage

Click the Action Menu and select Show Usage:

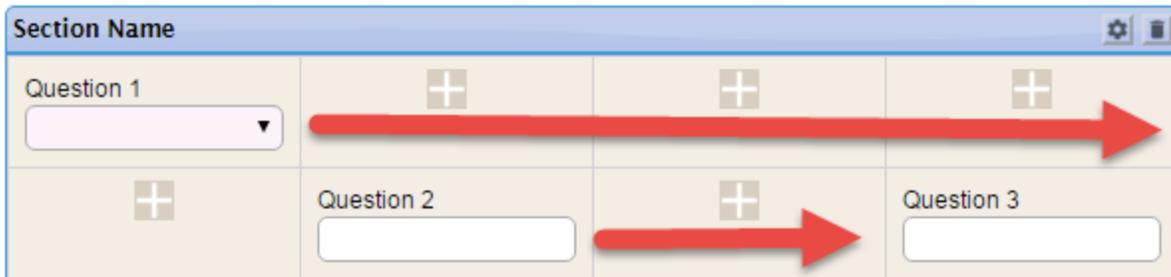


A list of data entry users currently using the Form and the name of the diseases the Form are associated with will display:

Usage		
Users currently using this Form:		
User Id	User Name	Where
FIREFOX	FIREFOX, Bruno	Investigation Id 2127247 (Edit)
Diseases associated with this Form:		
Diseases		
Ebola		

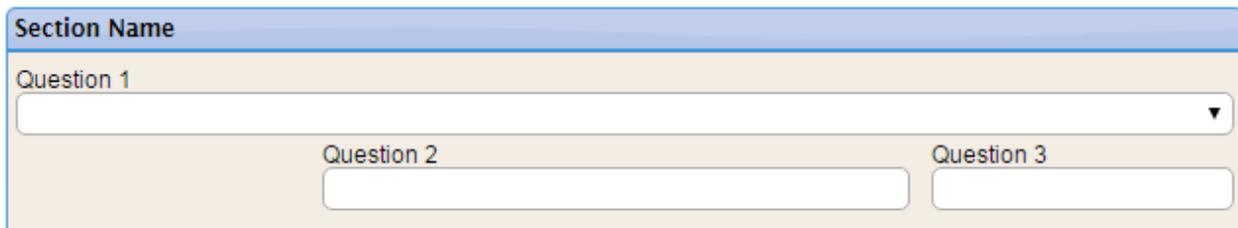
15.3 Cell Spanning (New in Feb 2016 Release)

If some of the table cells following a Form Element are blank, the Form Element will automatically extend across the row to use all the space until it gets to another Form Element or the end of the row:



In this example:

- Question 1 extended until the end of the first row.
- Question 2 extended until the beginning of Question 3.

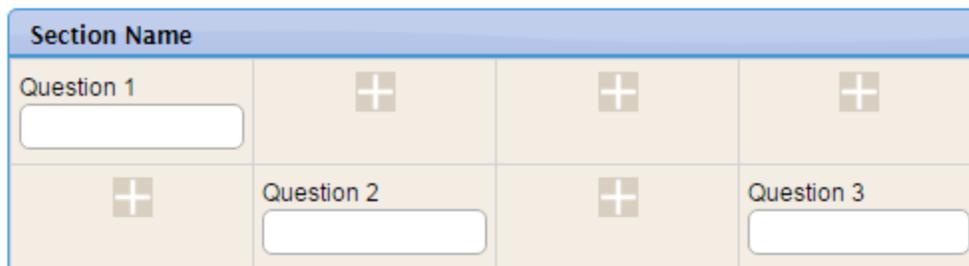


You can disable cell spanning by editing the Form Element and set **Cell Spanning** to **No**:

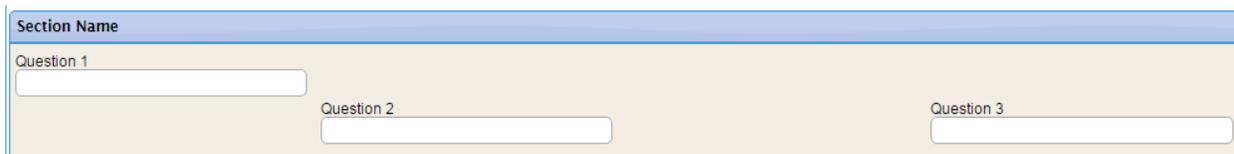
Common Validation & Advanced Properties

Required	Cell Spanning	Label Location
No	No	Above Question

With Cell Spanning off the following:



Will display like this:



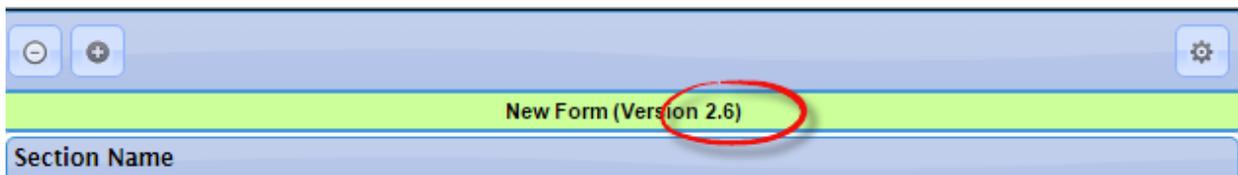
15.4 Different Previews...

Preview options:

- Preview latest version: Click on the eye icon in the main toolbar to open a preview of the latest version of the form while editing:

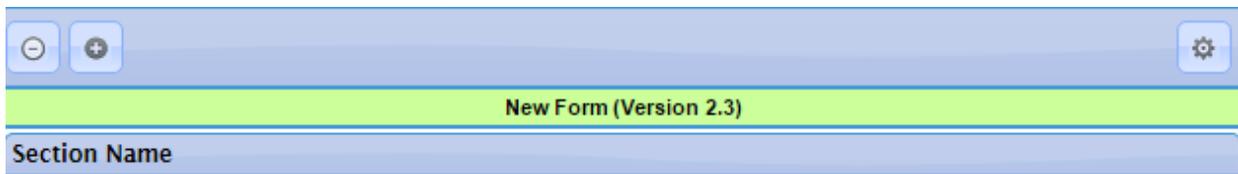


The version number will appear in the preview:

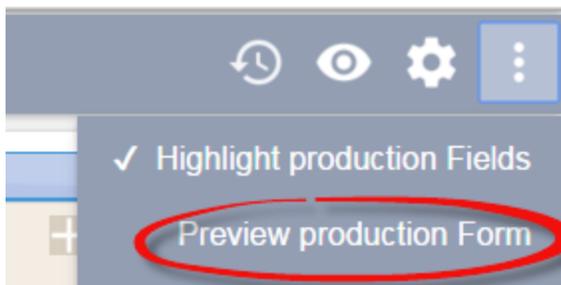


- Preview past versions: Click on History and select the eye icon in one of the rows.  This will show the specific version you selected.

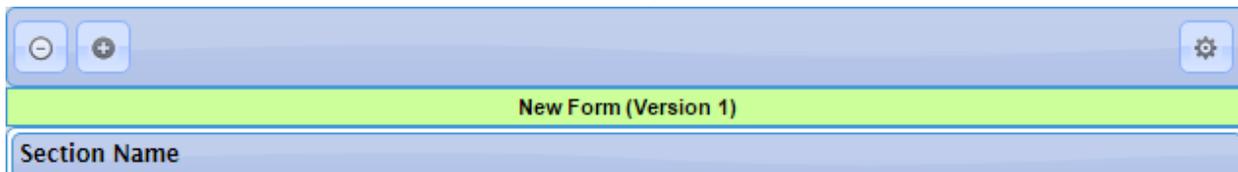
The version number will appear in the preview:



- Preview the Production version: Click the action menu and select Preview production Form:



You will see the Form as it is presented to the Data Entry User:



The version number will appear in the preview, but not in the data entry form.

15.5 Left Panel vs Right Panel

As mentioned earlier there are 2 places where you can have Form Elements:

1. Left Panel: Temporary place holder for Form Elements of Type Question.
2. Right Panel: Place where the Form Layout is defined.

How to add Form Element of Type Question to the left Panel:

1. Questions can be added to this panel by clicking on the bottom left beige plus icon. 
2. Questions can be dragged from anywhere in the right panel to the Left Panel (drop has to be done on the bottom beige plus left ).

How to add Form Element to the right Panel:

1. Form Elements can be added to this panel by clicking on any beige plus icon  within section/table cells.
2. Form Elements can be dragged and dropped from anywhere within the right panel section/table cells.
3. Form Elements can be dragged from anywhere in the left panel to any available section/table cell with the right panel (drop has to be done on the bottom beige plus left ).

Note: If Form Element of Type Question cannot be deleted after being promoted to production, leave the question on the left panel. It will no longer appear on the data entry form. It will still be exported at the end of the Supplemental Form (Supp Form) Case Listing Export with the word DELETED pre pended to the CSV Column header.

15.6 Bulk Add

“Bulk add” allows you to add multiple questions that have the same options for selection to the form:

Add Form Element
✕

Element Type

Dropdown Question ▼

Label & ID Properties

Label

COUGHT

ID

COUGHT

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required: No ▼ Cell Spanning: Yes ▼ Label Location: Above Question ▼

Dropdown Question Properties

Value Set: CUSTOM ▼

Include Blank Option: No ▼ Automatically Sort Options: Yes ▼

Options

Default	Hide/Del	Code	Display
<input type="checkbox"/>	<input type="checkbox"/>	Y	Yes
<input type="checkbox"/>	<input type="checkbox"/>	N	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>	U	Unknown

Bulk Add 

Check Bulk Add and click Submit.

The question will be added to the left panel in the background. The dialog box will remain opened with the same information entered except for Field ID and Label:

Add Form Element ✕

Element Type
Dropdown Question

Label & ID Properties

Label

ID

Header for CSV Export

Tooltip

Common Validation & Advanced Properties

Required No Cell Spanning Yes Label Location Above Question

Dropdown Question Properties

Value Set
CUSTOM

Include Blank Option No Automatically Sort Options Yes

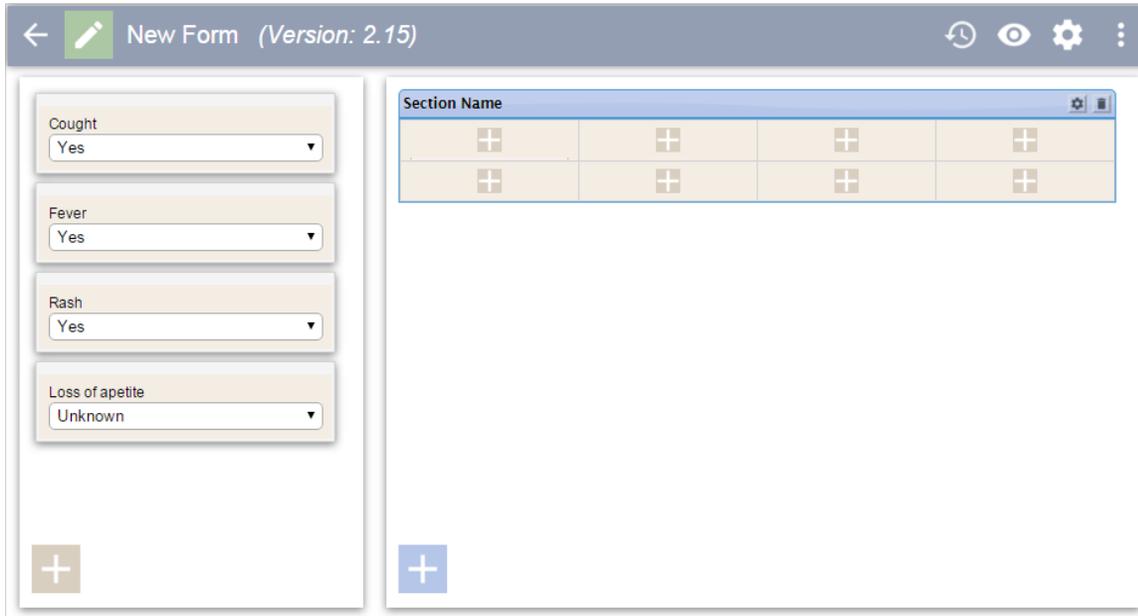
Default	Hide/Del	Code	Display
<input type="checkbox"/>	<input type="checkbox"/>	Y	Yes
<input type="checkbox"/>	<input type="checkbox"/>	N	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>	U	Unknown

Bulk Add

Submit
Cancel

Enter a new Question Label and click Submit. This can be done as many times as needed. To finish adding questions in bulk, uncheck Bulk Add before clicking Submit for the last question, or press Cancel at any time.

Questions added in bulk will be available on the left panel and can be dragged to the right panel.



The screenshot shows a software interface titled "New Form (Version: 2.15)". On the left side, there is a list of four questions, each with a dropdown menu:

- Cough: Yes
- Fever: Yes
- Rash: Yes
- Loss of appetite: Unknown

At the bottom of the left panel is a plus sign (+). On the right side, there is a table with a header "Section Name" and two rows of data. Each cell in the table contains a plus sign (+). At the bottom of the right panel is a blue plus sign (+).

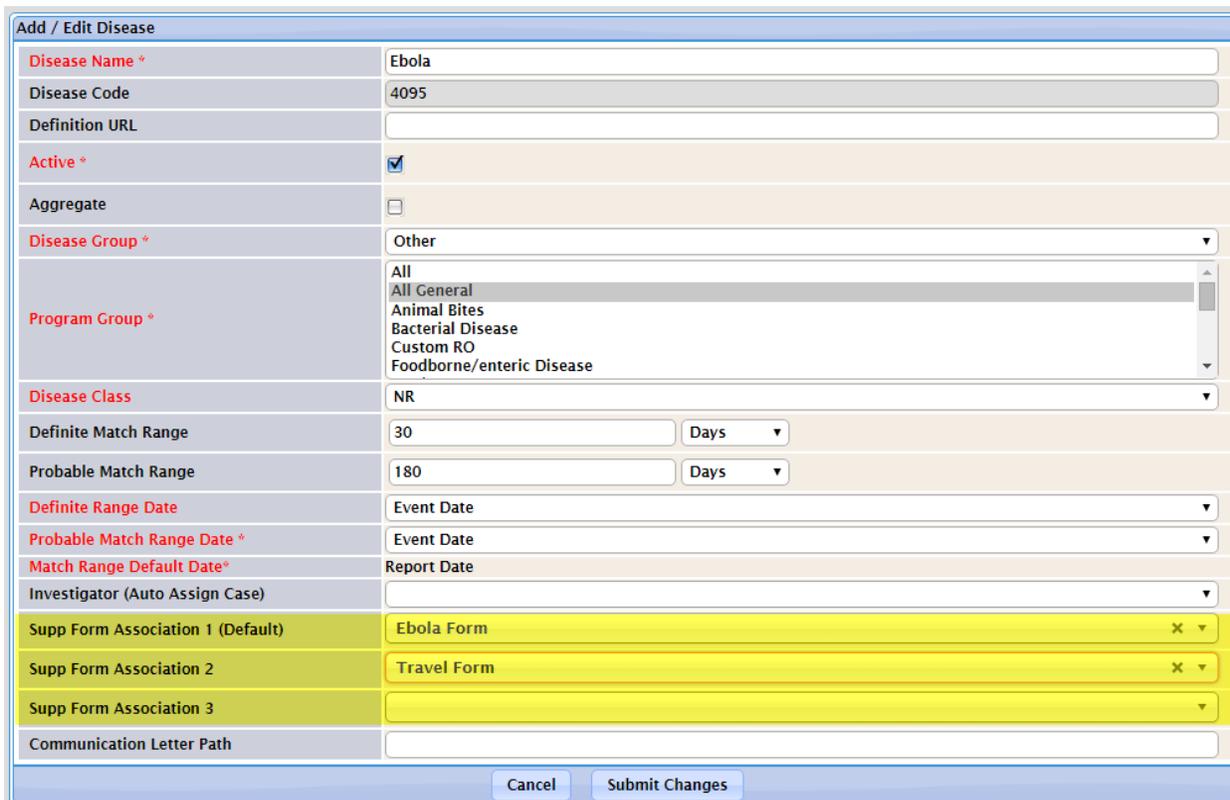
The purpose of this functionality is to save the user time in entering questions with the same drop down options for answers.

This functionality is only available when adding questions from the left panel. This functionality is not available if adding questions within a Section in the right panel.

16 Using Supplemental Forms (Updated in Feb 2016 Release)

16.1 Associate a Supplemental Form to a Disease

You can associate up to 3 supplemental forms to a disease when adding or editing a disease on the disease code management page (Menu: General Configuration/Disease Code Management):



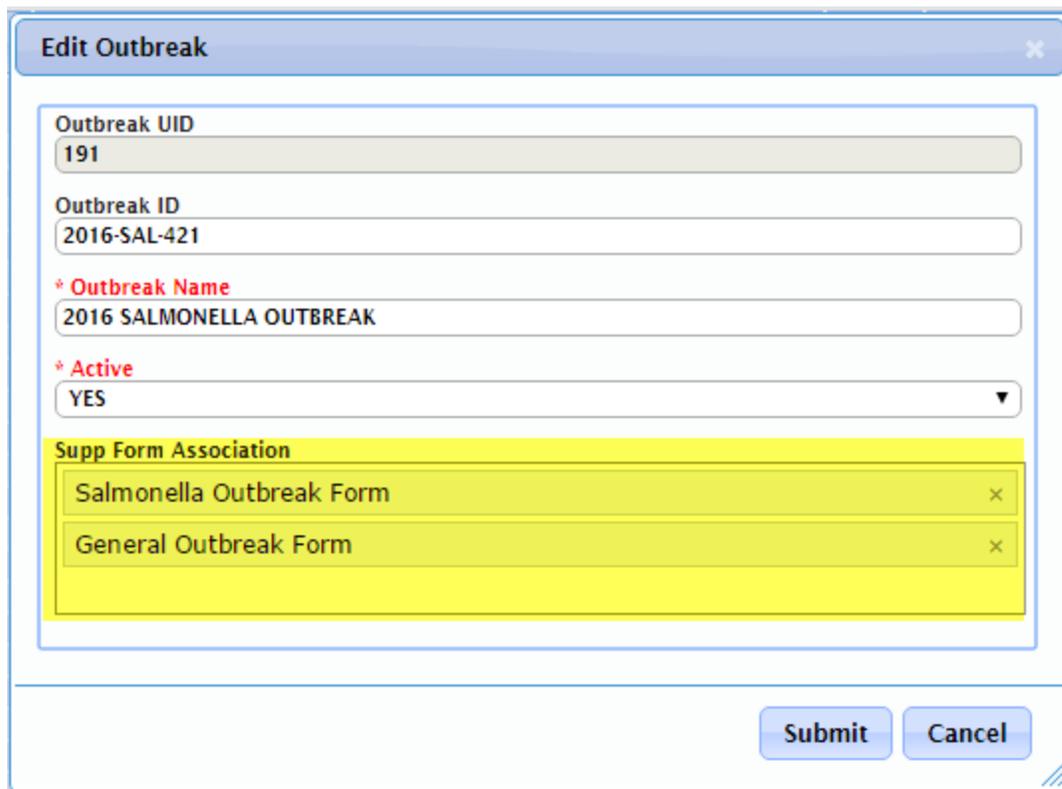
Add / Edit Disease	
Disease Name *	Ebola
Disease Code	4095
Definition URL	
Active *	<input checked="" type="checkbox"/>
Aggregate	<input type="checkbox"/>
Disease Group *	Other
Program Group *	<ul style="list-style-type: none"> All All General Animal Bites Bacterial Disease Custom RO Foodborne/enteric Disease
Disease Class	NR
Definite Match Range	30 Days
Probable Match Range	180 Days
Definite Range Date	Event Date
Probable Match Range Date *	Event Date
Match Range Default Date*	Report Date
Investigator (Auto Assign Case)	
Supp Form Association 1 (Default)	Ebola Form
Supp Form Association 2	Travel Form
Supp Form Association 3	
Communication Letter Path	

Notes:

1. The same form cannot be associated more than once to the same disease.
2. Some System Supplemental Form are exportable to the CDC thru NETSS and Phin Message. Do not associate more than one of this form to a disease as it may cause problems.
3. Supp Form Association 1 will be the default Form to be displayed for data entry when more than one form is associated.
4. Once a Supp Form is associated to a disease; you will not be able to associate this form with an outbreak.

16.2 Associate Supplemental Form to an Outbreak

You can associate up to 3 supplemental forms an outbreak when adding or editing an outbreak on the Outbreak management page (Menu: General Configuration/Outbreak management):



The screenshot shows a web form titled "Edit Outbreak" with the following fields and sections:

- Outbreak UID:** 191
- Outbreak ID:** 2016-SAL-421
- * Outbreak Name:** 2016 SALMONELLA OUTBREAK
- * Active:** YES (dropdown menu)
- Supp Form Association:** A list containing:
 - Salmonella Outbreak Form
 - General Outbreak Form

At the bottom right of the form are "Submit" and "Cancel" buttons.

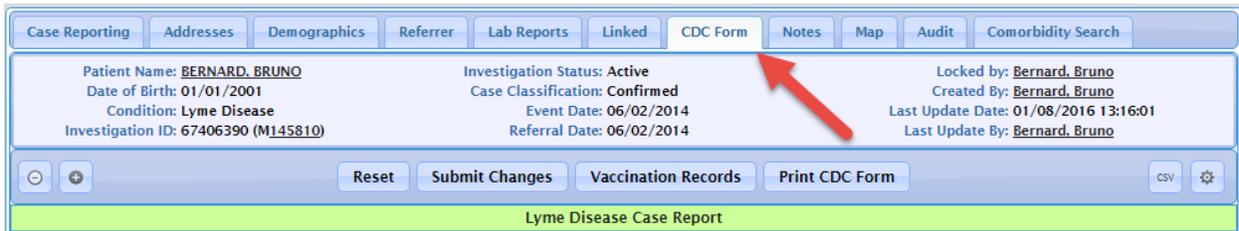
Notes:

1. The same form cannot be associated more than once to the same outbreak.
2. Once a Supp Form is associated to an outbreak; you will not be able to associate this form with a disease.

16.3 Supplemental Data Entry within a Case

16.3.1 Single Supplemental Form Associated to a case

If only one form is associated with a case (disease + outbreak) there will be a tab that will appear between the Linked Tab and the Notes Tab:



Case Reporting	Addresses	Demographics	Referrer	Lab Reports	Linked	CDC Form	Notes	Map	Audit	Comorbidity Search
Patient Name: <u>BERNARD BRUNO</u>		Investigation Status: Active		Locked by: <u>Bernard Bruno</u>		Created By: <u>Bernard Bruno</u>		Last Update Date: 01/08/2016 13:16:01		
Date of Birth: 01/01/2001		Case Classification: Confirmed		Created By: <u>Bernard Bruno</u>		Last Update Date: 01/08/2016 13:16:01		Last Update By: <u>Bernard Bruno</u>		
Condition: Lyme Disease		Event Date: 06/02/2014		Referral Date: 06/02/2014						
Investigation ID: 67406390 (M145810)										
Reset		Submit Changes		Vaccination Records		Print CDC Form		CSV ⚙️		
Lyme Disease Case Report										

The name of the tab will be either:

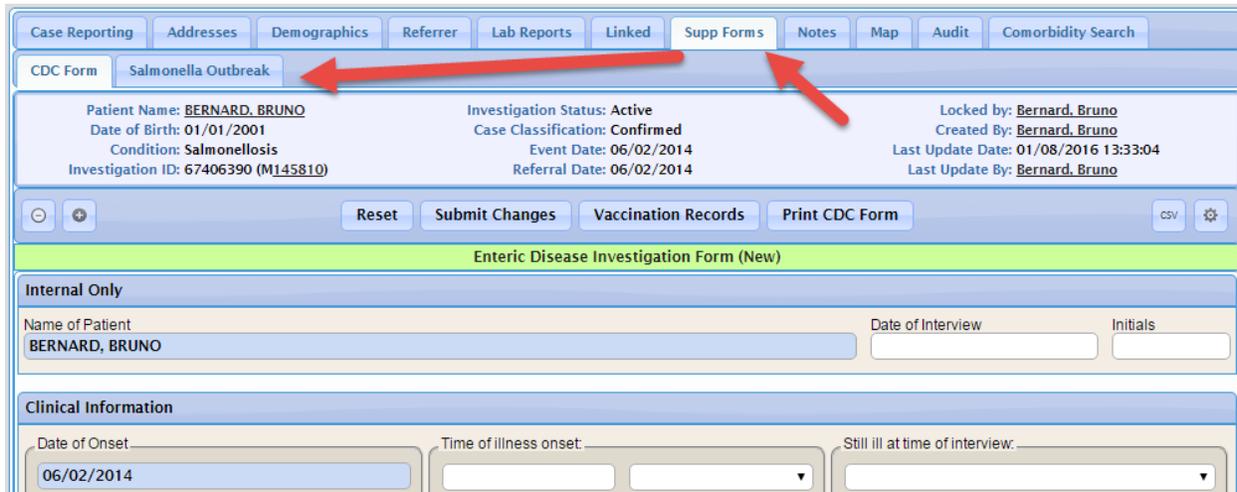
- CDC Form and system CDC Forms.
- The Tab Name that you defined on the form Management.

When you click on the Supplemental Form Tab, you will be able to:

- View the Form
- Edit the Form
- Print the Form

16.3.2 More than one Supplemental Form Associated to a case

If more than one form is associated with a case (disease + outbreak) there will be a tab named Supp Forms that will appear between the Linked Tab and the Notes Tab:



By clicking on Supp Forms, a new row of tab will appear underneath with all the forms associated with this case. This includes:

1. Up to 3 Forms Associated with the condition associated with this case.
2. Up to 3 Forms Associated with the Outbreak Name that is associated with this case on the Case Reporting Tab.

The default form to open is the first form associated with the disease. If there are no disease Supp Form association then it will be the first form associated with the outbreak.

On the second row of tabs each tab name will be either::

- CDC Form and system CDC Forms.
- The Tab Name that you defined on the form Management.

When you click on the Supplemental Form Tab, you will be able to:

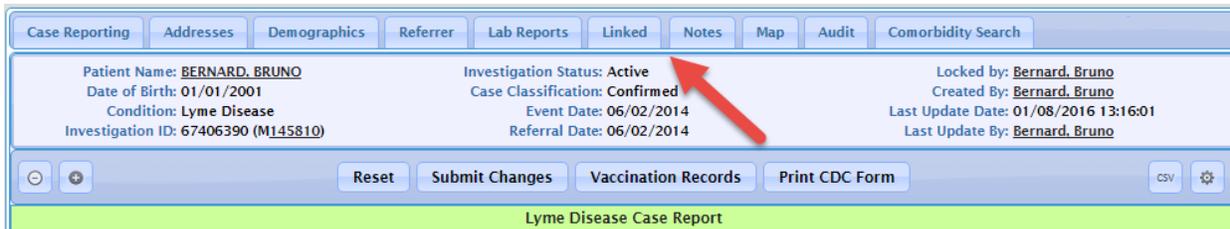
- View the Form
- Edit the Form
- Print the Form

If you go over any tab on the second row, a tooltip will appear with the full name of the form:



16.3.3 No Supplemental Form Associated to a case

When no Supplemental Form is associated with a case, then there will be no tab in between Notes and Linked:



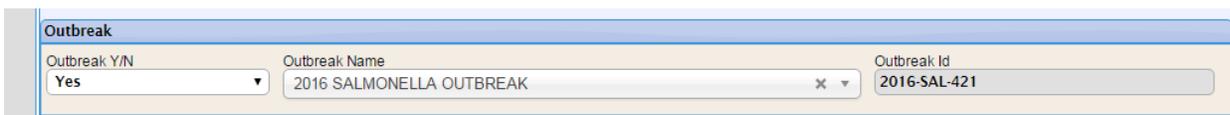
Case Reporting	Addresses	Demographics	Referrer	Lab Reports	Linked	Notes	Map	Audit	Comorbidity Search
Patient Name: <u>BERNARD, BRUNO</u>		Investigation Status: Active			Locked by: <u>Bernard, Bruno</u>				
Date of Birth: 01/01/2001		Case Classification: Confirmed			Created By: <u>Bernard, Bruno</u>				
Condition: Lyme Disease		Event Date: 06/02/2014			Last Update Date: 01/08/2016 13:16:01				
Investigation ID: 67406390 (M145810)		Referral Date: 06/02/2014			Last Update By: <u>Bernard, Bruno</u>				
-		+		Reset	Submit Changes	Vaccination Records	Print CDC Form	CSV	⚙️
Lyme Disease Case Report									

16.4 Outbreak and Supplemental Forms

If you assign an outbreak name that have a Supplemental Form Assigned to it, then the associated form(s) will be available on the Supp Form Tab.

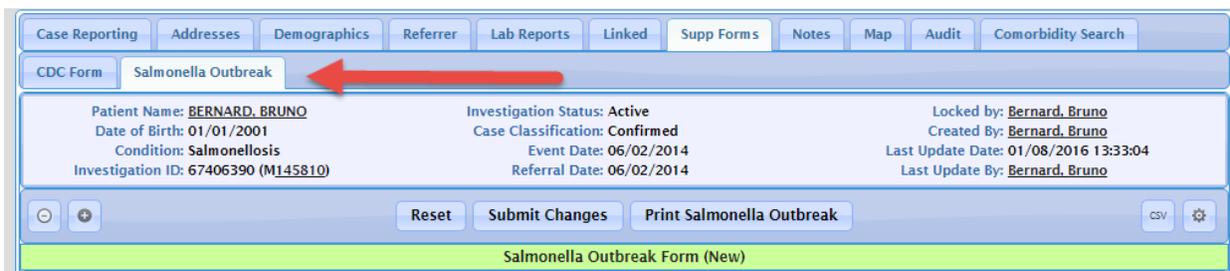
Example:

If we assign 2016 Salmonella Salem to a case:



Outbreak		
Outbreak Y/N	Outbreak Name	Outbreak Id
Yes	2016 SALMONELLA OUTBREAK	2016-SAL-421

then the Salmonella Outbreak Form will be available:



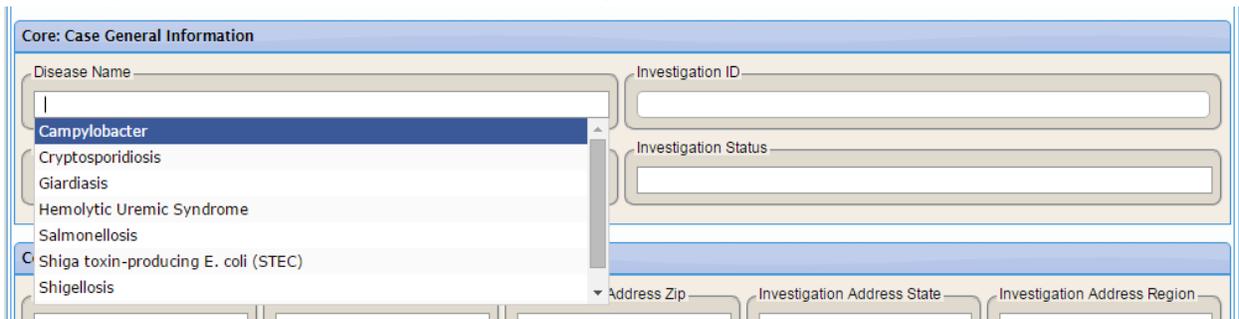
Case Reporting	Addresses	Demographics	Referrer	Lab Reports	Linked	Supp Forms	Notes	Map	Audit	Comorbidity Search
CDC Form	Salmonella Outbreak									
Patient Name: <u>BERNARD, BRUNO</u>		Investigation Status: Active			Locked by: <u>Bernard, Bruno</u>					
Date of Birth: 01/01/2001		Case Classification: Confirmed			Created By: <u>Bernard, Bruno</u>					
Condition: Salmonellosis		Event Date: 06/02/2014			Last Update Date: 01/08/2016 13:33:04					
Investigation ID: 67406390 (M145810)		Referral Date: 06/02/2014			Last Update By: <u>Bernard, Bruno</u>					
-		+		Reset	Submit Changes	Print Salmonella Outbreak	CSV	⚙️		
Salmonella Outbreak Form (New)										

16.5 Search Cases using a Supplemental Form

16.5.1 Supp Form Associated with a disease

If you do a Supp Form Search without entering any information on the search page, it will return all the cases where the disease is associated with this Supp Form.

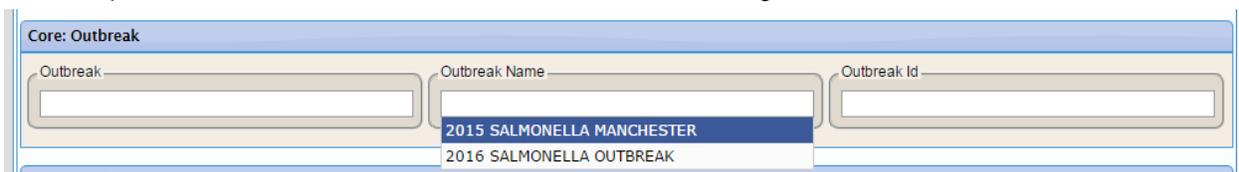
Please note that the Disease Name filter will only include the diseases that are associated with this form. For example the Enteric Form will show the following diseases:



16.5.2 Supp Form Associated with an outbreak

If you do a Supp Form Search without entering any information on the search page, it will return all the cases where the outbreak name selected is associated with this Supp Form.

Please note that the Outbreak Name filter will only include the outbreaks that are associated with this form. For example the Salmonella Outbreak Form will show the following outbreak:

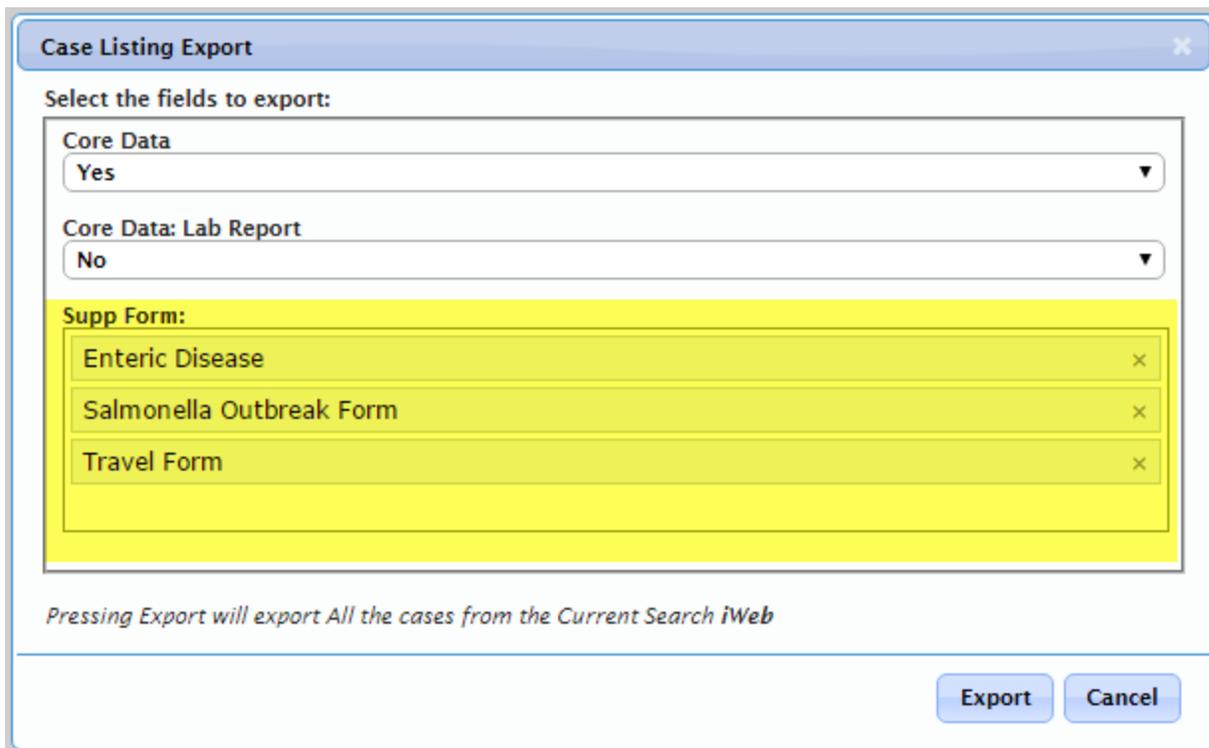


The same thing will apply to Outbreak Id.

16.6 Export Supplemental Form

You can now export an infinite number of forms from the Case Listing Export.

In this example the Enteric Disease, Salmonella Outbreak Form and Travel Form will be included in the export:



Case Listing Export [X]

Select the fields to export:

Core Data
Yes ▼

Core Data: Lab Report
No ▼

Supp Form:

- Enteric Disease [X]
- Salmonella Outbreak Form [X]
- Travel Form [X]

Pressing Export will export All the cases from the Current Search iWeb

Export Cancel

The addition columns will be appended at the end of the export in the order the Supp Form appears on the multiselect.

17 Outbreak Event Form (New in May 2016 Release)

17.1 Form Definition

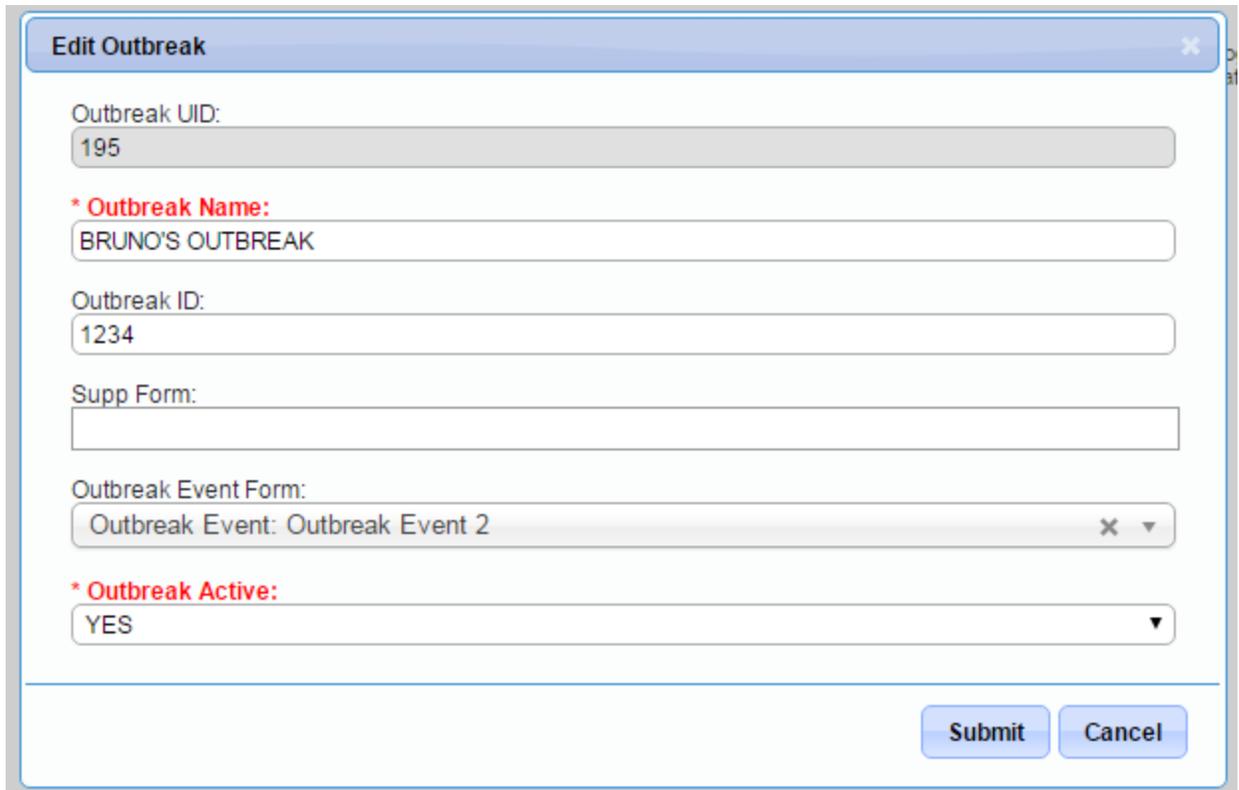
If you want to create a form to be used for Outbreak Event Data entry, you need to create a form of type **Outbreak Event Form**. You will be able to define the form the same way as a **Supplemental Form** except for the following differences:

- Only the following Core Fields can be on the Form:
 - Patient's First Name
 - Patient's Last Name
 - Patient's Middle Name
 - Patient's Date Of Birth
 - Patient's Sex
 - Patient's Race
 - Patient's Ethnicity
 - Patient's Home Phone
 - Patient's Work Phone
 - Investigation Address Street1
 - Investigation Address Street 2
 - Investigation Address State
 - Investigation Address City
 - Investigation Address Zip
 - Investigation Address County
- To be able to promote a form to production the system will enforce the following:
 - Patient's First Name is required to be added in form
 - Patient's Last Name is required to be added in form
 - Patient's First Name needs to marked as required
 - Patient's Last Name needs to marked as required
 - if Investigation Address State or City or Zip or County is present within the form, then Investigation Address State and City and Zip and County are required to be added in the form.
- Once Promoted to production core Data Question cannot be removed but can be moved to the left panel except for:
 - Patient's First Name
 - Patient's Last Name

17.2 Associate Outbreak Event Form to an Outbreak

To associate a **Outbreak Event Form** to an outbreak:

- Go to the Outbreak Management
- Add or Edit and Outbreak
- Select the Form to be used for outbreak event:



Edit Outbreak

Outbreak UID:
195

* **Outbreak Name:**
BRUNO'S OUTBREAK

Outbreak ID:
1234

Supp Form:
[Empty field]

Outbreak Event Form:
Outbreak Event: Outbreak Event 2

* **Outbreak Active:**
YES

Submit Cancel

Note: There are now 2 type of form you can associated with an outbreak:

- **Supp Form:** Outbreak Form that will appear on the Human Disease Case when the case is assigned to an outbreak. You can select up to 3 Forms
- **Outbreak Event Form:** Outbreak Form what will be used to record outbreak events using the Outbreak Events module.

18 Outbreak Summary Form (New in May 2016 Release)

18.1 Form Definition

If you want to create a form to be used for Outbreak Event Data entry, you need to create a form of type **Outbreak Summary Form**. You will be able to define the form the same way as a **Supplemental Form** except for the following differences:

- Only the following Core Fields can be on the Form:
 - Outbreak Name
 - Outbreak Id
- Once Promoted to production core Data Question cannot be removed but can be moved to the left panel.

18.2 Associate Outbreak Summary Form to an Outbreak

This part will be coming in a future release

