Form Maker

Special Assessments/Forms

ECS has developed a tool called Form Maker, which provides advanced report setup capabilities to facilities. These advanced capabilities allow users to design and implement reporting tools that are similar to working through a standardized report or form that you would see on paper.

Some of the unique features of using Form Maker include:

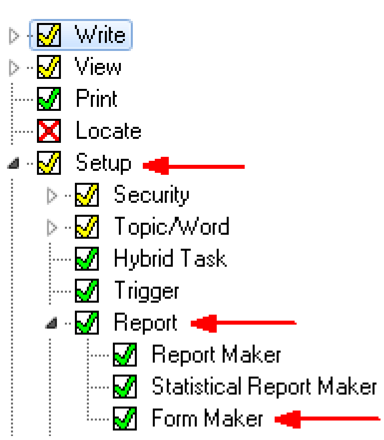
- Automatic population from Client Demographics. As in standard paper forms, you don't have to print the name and date repeatedly; these fields are automatically populated.
- Automatic population from the client's record. Certain fields, when set up properly, will review the client's record and collect the information for the user to pull to the report or suggest the best answer to select based on the data in the client's record. Paper forms cannot do this.
- Ability to start an assessment and then have another user finish the assessment at a later date. With regular charting screens, everything is date and time stamped when it's saved. Sometimes retrieving this data in a general report later can be a little tricky if the data is completed on separate dates.
- Electronic submission of assessments to intermediaries for required reporting purposes. Examples of this include the MDS RCA for the State of Maine and the OASIS assessments required for Home Health.

Form Maker Basics

To access Form Maker, there are a couple of things that need to be changed in order for the users in that group to have rights to the necessary functions.

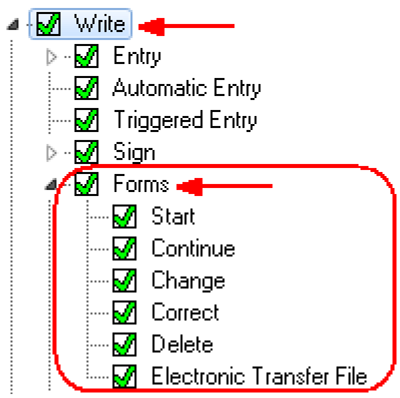
User Group Rights: Set up Assessments in Form Maker

1. Click the **American Data – ECS** button and follow the path **Setup > Security > User Group**.
2. Locate the User Group in the listing that needs rights to Form Maker setup. Double-click on the group or right-click on the group and select **Properties**.
3. On the Rights tab, click **Setup** and then **Report**. Locate the **Form Maker** feature and click in the box until there is a green check mark.
4. When finished, click the setting next to **Setup** to collapse the Setup window.



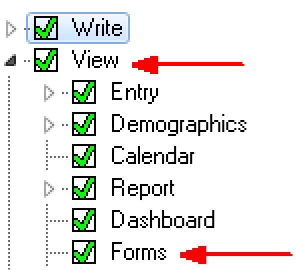
User Group Rights: Write Functions for Assessments in Form Maker

1. On the Rights tab, click **Write** and then **Form**. Click in the box for all of the features (Start, Continue, Change, etc.) to which this user group should have rights.
   - **Start** allows the users in the group to start an assessment.
   - **Continue** allows the users in the group to continue working an assessment after it's been started.
   - **Change** allows the users in the group to change an assessment after it's been submitted/locked in ECS.
   - **Delete** allows the users in the group to delete an assessment. This can be either a form in progress or a form that has been submitted/locked.
   - **Electronic Transfer File** allows the users in the group to create electronic batch files and transmit.
2. When finished, click the setting next to **Write** to collapse the Write window.



User Group Rights: View Assessments in Form Maker

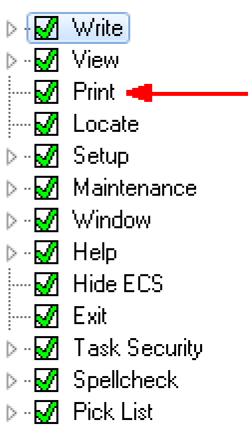
1. On the Rights tab, click **View**. Make sure there is a green check mark in the option for **Forms**.
   - This feature allows the users in this user group to View forms for clients. In "view" mode, changes cannot be made to the assessment.
2. When finished, click the setting next to **View** to collapse the View window.



User Group Rights: Print Assessments in Form Maker

1. On the Rights tab, click **Print**. Make sure there is a green check mark in the option for **Print**. This gives the user group rights to print assessments from Form Maker.

2. When all the settings are in place, click **OK** to save the changes.
   - Note that changes will not take effect until the user(s) log back into ECS.

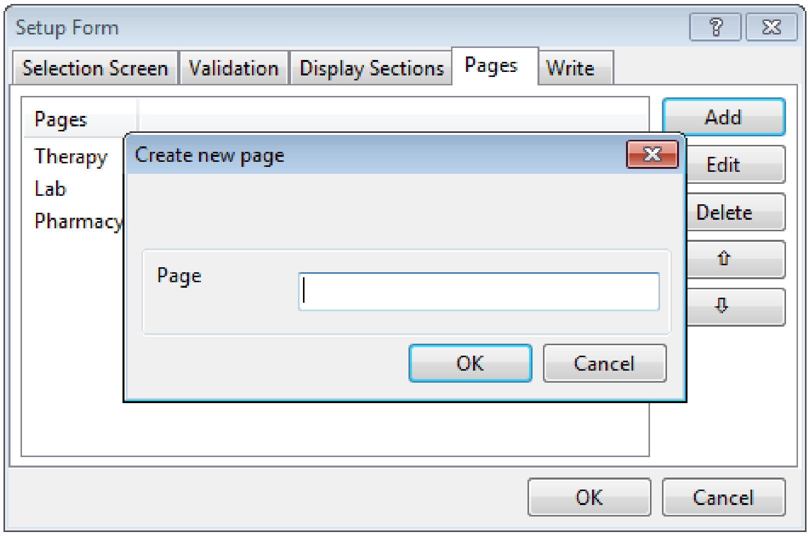


Form Creation

Setting Up a New Form

Once the User Group rights have been established, users can begin creating assessments in Form Maker.

1. Click the **American Data – ECS** button and follow the path **Setup > Report > Form Maker**.
2. The first screen to appear is the Form Type selection screen. This area allows users to categorize assessments. For example, for the OASIS, there are six forms. On the Form Type selection screen, there is a category for OASIS. How assessments are categorized is typically up to the facility.
3. To create a Form Type, click **Add**. Type in the description of the Form Type (e.g., Nursing Assessments).
4. Click **OK** when finished. You will need to assign rights to the Sites/Services and User Groups that need rights to this type. You will then see the new Form Type in the list.
5. Click on the new Form Type and then **OK**. This will bring you to a Form Selection screen.
6. Click **Add** and type in a name for the new Form.
7. Click **OK** when finished. You will now see the new Form in the list.
8. Select the new form and click **Setup**. Select the Display Sections tab where you will define what display sections are going to be on the form. This is what the user will see when working through the assessment. Click **Add** and then label each display section.
   - A simple example is if you think of an MDS, there are sections AA, AB, A, B, etc. Those would be considered Display Sections.
9. Click on the Pages tab. Click **Add** and name the pages. Click **OK** when finished. Typically the pages are labeled the same thing as the Display Sections. These are what the user will see when creating the form.

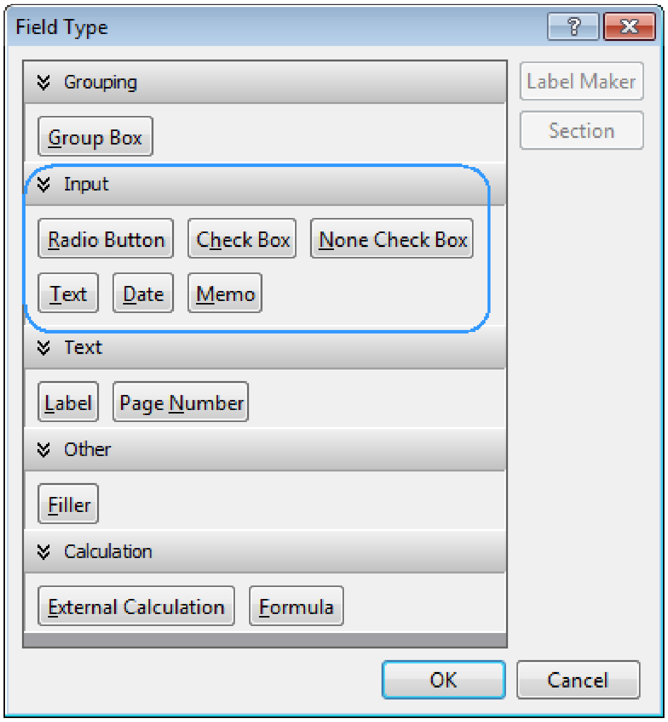


10. Click **OK** when finished. This will open a new form. You will see tabs (these are the pages) labeled across the top of the form.

Description of Form Options

After you have the form established, you need to create fields on the form that will be used when completing.

1. Right-click on the blank for and select **Add**. Or, click **Add** at the bottom of the screen.
2. Select the option for **Group Box** and click **OK**.
    - Everything that is created on the form must be contained inside of a group box. You cannot add anything to the blank canvas other than a group box. This is why they are grayed out.
3. Once the group box is on the canvas, click on the group box and drag it to where you want it placed. Use the gray dragging boxes to resize the box to the desired size. Double-click on the group box so that the Setup screen appears. On the Control screen, click on the drop down arrow under Display Section, and specify where this is to appear on the assessment.
4. At the top of the Group Box, there is a field for Answer/Question. Type in the description of what this Group Box will represent (there is a character limit of 10). Click **OK** to save the changes. Click **Save**.
5. Right-click on the group box, and click **Add**. Now the other options will activate for you to add data to the form. The following options are available under the Input area:



- **Radio Button** is used when the user can only select one answer in a group box. For example, if the form states "Male" or "Female," you would create Radio Buttons for these options so that only one can be selected.
- **Check Box** is used when the user can select multiple answers on the form. For example, if the question states, "check all that apply," then you would create checkboxes for all of the answers in the group box so that the user can check any that apply to the client.

- **None Check Box** is used to inactivate all the other check boxes in a group box. For example, if the question states "check all that apply" and there are 10 options, but none of them apply, the user can click the **None** checkbox option on the form. Clicking this checkbox will gray out the other 10 options so that they are not available.
- **Text** is used to display certain types of data on the report. They are used to pull the client's name to a field (or any Client Demographics), simple information (marital status from Personal Information), or Site information such as NPI or Site Name.
- **Date** is used when a date must appear in the field, for example, "Date of Assessment." This can be set to automatically fill in the current date, or the user must click the field when completing the report to select a date.
- **Time** field will allow you to choose a specific time from the clock or have the field display the current time when collected. You can document a time when something occurred. You can input a time or choose Current Time.
- **Memo** is used when the user must free type information into the form. For example, if the form requires the user to "explain, describe, state" information about the client, then a memo field is used to allow the user to free type into the form.

6. Under the Text area there are options for Label and Page Number.
   - **Label** is used to create titles and descriptions for answers on the form. For example, if the assessment is called "ABCD," then you would create a Label field to create the title for the assessment.
   - **Page Number** is used to create a page number field on the form.
7. Under the Other area there is an option for Filler.
   - **Filler** is used to create filler lines, boxes, etc. on the form.
8. Under Calculation there are options for External Calculation and Formula.
   - **External Calculation** is used when the assessment needs to interface for a 3rd party scoring tool. For example, the MDS RCA calculates a Case Mix score based on the answers that the user selected during the assessment process. The calculation for the Case Mix is created by another company in the State of Maine. Their calculation formula from this company is programmed in by American Data to calculate the correct score. This is also true for the OASIS HIPPS Score on the Home Health side.
   - **Formula** is used when forms need to add information. For example, if the assessment needed to total the number of answers selected in a particular section/group box, a Formula field would be used to count the number of checkboxes that were selected to give a total. They can also calculate scores, based answers, etc.

Form Development

Select one of the form field option types as described in the *Description of Form Options* section above. In the example below, we'll add a Label and Text field.

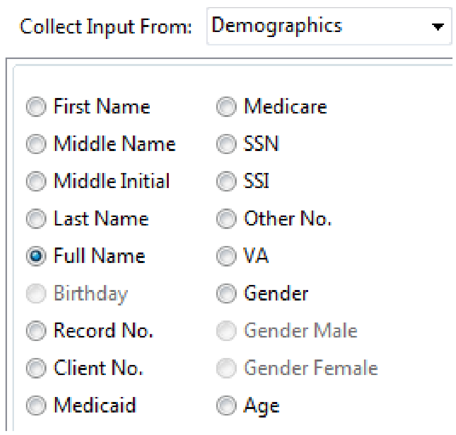
Label Field

1. Right-click on the group box and select **Add**. Or, click **Add** at the bottom of the screen.
2. Select **Label** and click **OK**. This will place the Label field in the group box.
3. Right-click on the label and select **Setup**.
4. On the Control tab, enter the text that you want to appear on the form in the **Field Text** field.
5. There are additional options on this Setup window that can be set, such as the font, if desired. Make any applicable changes and click **OK** when finished. Depending on the changes that were made, it may be necessary to manually expand the size of the field; it doesn't auto-size.
6. Click on the field and drag it to the desired location within the group box for placement.

Text Field

1. Right-click on the group box and select **Add**. Or, click **Add** at the bottom of the screen.
2. Select **Text** and click **OK**. This will place the Text field in the group box.
3. Click on the field, then right-click, and select **Setup**.
4. Enter a description for the field in the Answer/Question box at the top of the screen. A good rule of thumb when labeling fields is to try to use names that represent the section and answer. For example: A_1a. During other setup processes, the names of the fields may be required, so it's good to get in the habit of labeling them from the start. On the Control tab, other adjustments can be made (e.g., font).
5. Click on the Input tab. On the Input tab, there is a **Collect Input From** field. This is where the user defines what to pull into the field during the collection process. The options are described below.
   - **Demographics**. This option will populate the Client Demographic information into the field, for example, Full Name.
   - **System**. This option will populate System information into the field, for example, the User's Name.
   - **Signature**. This type of field is used when the User's Signature, Title, and Sections are to be defined on the assessment.
   - **Site**. This option will pull in limited Site information, for example, the NPI number or Site Name.
   - **Formula**. This option allows the user to build a formula to have the answer qualify. This is typically used on Radio buttons and Checkboxes only. This is a more advanced setup and requires more explanation. Please contact American Data for assistance.
   - **Documentation**. This option allows the user to pull in data from the charting. Please keep in mind that the data pulling to this field should be minimal in content (e.g., a blood pressure result, weight, etc.). If there is a significant amount of data that needs to populate, then a Memo field is recommended.
   - **Medication**. This is an advanced setup specific for medications and requires further explanation. Please contact American Data for assistance.
6. For demonstration purposes, select the option for **Demographics**.

7. Select the **Full Name** option and click **OK**.



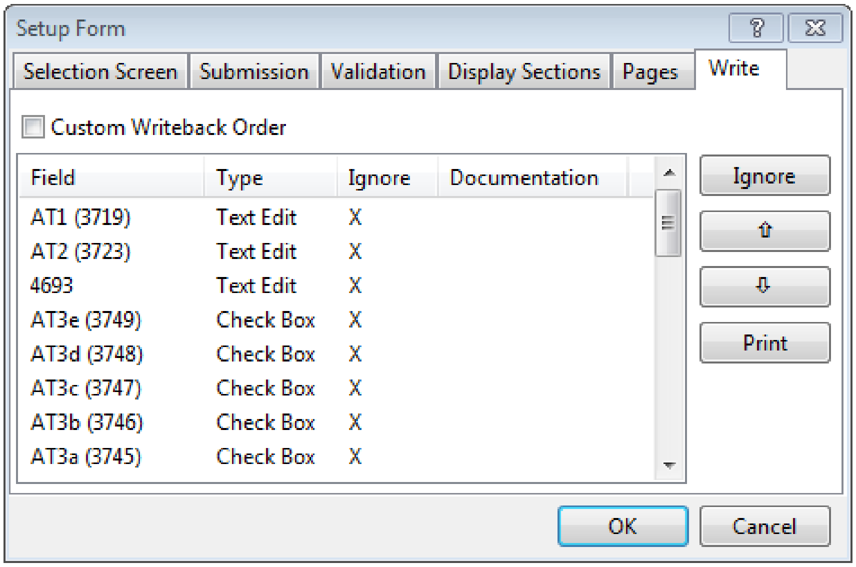
8. Drag the Text field to the desired location in the Group Box. You may need to expand the length of the field so the data will fit when collected. Click **Save** to save the changes.
9. There are additional settings that a user can set on a Text field. For example:
   - The **Output** tab allows the information entered onto the form to be written back into the record when it's submitted. To use this feature, click **Add** and locate the button word to where the information should write back. When the form is submitted, the button word will then auto-document for the user along with whatever was entered into the box. Other options for the write-back can also be defined:
     - If a button word is linked and the user just wants the data in the field to write back, leave the Write Text column defaulted to No.
     - If a button word is linked and the user wants the information in the field to write back, along with any free text, then click on the button word link and click the button for **Write Text**.
     - Value can also be populated and written back. This is a more uncommon setting and would require further explanation. Contact American Data for assistance.
     - The area for Write Electronic Data is available when the assessment that's created needs to be converted into an electronic file format and transmitted from ECS. This is an advanced setup and requires more explanation. Contact American Data for assistance.
   - The **Edits** tab allows the user to set up specific formatting of the data entered into the field. This is an advanced setup and requires further explanation. Contact American Data for assistance.
   - The **Links** tab allows the user to set up rules when the assessment is being completed. One of the most common rules is: If X is selected, then skip Y. There are also some settings that can be placed, which are listed below.
     - **Form Selection Screen Date** – This is the date that will appear to the user when looking at the listing of forms that have been completed for the user.

- **Form Selection Screen Name** – This setting is only available to Group or Text Boxes. The Group or Text Box must have a description in the Question/Answer field. You can use it for repurposed forms to properly identify what kind of a form it is. On the MDS RCA it's used to identify what type of form it is for the full assessments because there are only full assessment and discharge forms. If you set it up on Group Box, you have to specify field text on radio buttons inside the group boxes, and the selected one will be chosen on the Form Selection Screen.
- **Collection Reference Date** – If the Date field is set to Collection Reference Date, then this is the date the form will use as a reference when collecting data for the assessment.
- **Calculations** and **Calculation Formulas** are more advanced setups and will need further explanation. Please contact American Data for assistance.

Configure Writeback Order

One area that is important for users to manage is the **Writeback Order**. The Writeback Order is the writeback process that is done by the form when it is submitted by a user. It takes the data that was collected/entered on the form and writes the information back into the client's record. It's important that this order be set correctly so that data flows in the correct order back into the record. To set the writeback order:

- Make sure no fields are selected on the form. The user can click on an empty white space on the form canvas to ensure that no fields are selected.
- Click **Setup** at the bottom of the Form Maker screen. This Setup Form screen will appear.
- Select the Write tab.



- Upon creating the form, the system will automatically assign the writeback order unless the user selects the **Custom Writeback Order** checkbox. This allows the user to adjust the fields manually in the Write tab.

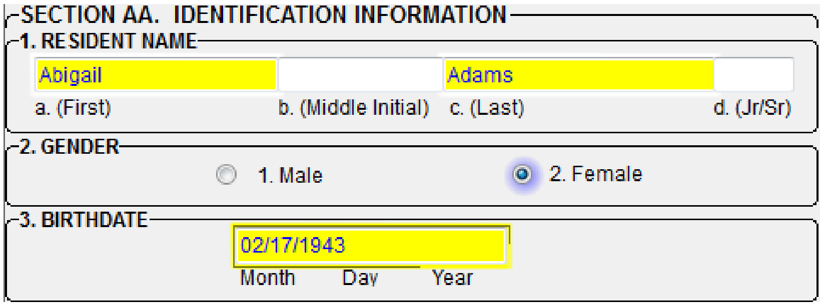
- The first column shows the **Field** displayed, and the second column shows the **Type** of field. This information assists the user when setting the writeback order.
- The third column is labeled **Ignore**. The X signifies that the row will be ignored (i.e., will not be written back). Some fields do not need to write back, such as the client's name. If the user wants the field to write the information back into the record, remove the X from this column by clicking the link and then clicking **Ignore**.
- To adjust the writeback order, select the **Custom Writeback Order** box.
- Highlight a link or highlight multiple links by holding the Ctrl key on the keyboard.
- Click the Up and Down arrows to move the link(s) in the list.
- When finished, click **OK** to save the changes.
- Click **Save** to save the changes to the form.

Form Completion

Start Assessment

Once the form is underway, the user can start the form to evaluate the progress (during the creation of the form to see how it will look to the end user) and complete the form (once it's set up). The steps below explain how to start a form.

1. Click the orange **Start** icon. Or, click the **American Data – ECS** button and follow the path **Write > Forms > Start**. If you are using an Access screen, click the **Start Assessment** button.
2. Select the resident name and click **OK**. You can only start one assessment at a time.
3. When the Form Type selection screen appears, select the desired **Form Type** and click **OK**.
4. When the Form Selection screen appears, select the desired **Form** and click **OK**.
5. The form will appear on the screen. Start by clicking **Status** at the bottom of the screen.
6. Click **Collect**. A collection date screen will appear. This is the last date of the assessment period for ECS to search for the documentation for the form. Click the pick list box and select the desired date. Click **OK** for the form to process.
7. In the lower left corner of the screen, there will be a progress bar that will show the progress of the collection process. On the first page of the form you will begin to see yellow highlights.
    - Once the yellow highlights appear on the first page, you can begin working on the assessment. If you happen to finish page 1 before the form has finished collecting, just move to the very next page and begin. You will just need to come back later and save.
8. To complete the form, some fields such as the name, DOB, etc. will automatically populate with data. Other fields may be highlighted yellow but don't automatically populate. The user must right-click on the highlighted field that didn't populate and select the appropriate answer from the suggestions provided.


SECTION AA. IDENTIFICATION INFORMATION
1. RESIDENT NAME
Abigail | | Adams |
a. (First) b. (Middle Initial) c. (Last) d. (Jr/Sr)
2. GENDER
1. Male 2. Female
3. BIRTHDATE
02/17/1943
Month Day Year

9. Other fields may not be highlighted or populated at all. These are fields that the user must fill in manually to complete the form.
10. Work through the assessment by completing each page. Click **Save** as you move from page to page.
    - If you click the next page, it will prompt you to save. Always click **Yes** if changes were made. If no changes were made, you can click **No** to move on to the next page.
11. After each page has been completed AND saved, the user can submit/lock the assessment in place by clicking **Status** and then **Submit**. This will then officially submit the assessment and write back any answers if writebacks were set up.
    - Keep in mind, just "saving" the page will not write back the answers into the record. Only submitting the assessment will complete the writeback process.
12. If the assessment is unable to be fully completed and submitted all at the same time, that's okay. There is an option for **Continue** that will allow that user or a different user to finish the assessment.

Continue Assessment

A user can continue the form at any time. Keep in mind, once a form has been "started" for a client, you must use the Continue option to complete the form. Do not again click **Start** until the prior form has been completed and submitted. This can cause duplication of forms.
The steps below explain how to continue a form in progress.

1. Click the orange **Continue** icon. Or, click the **American Data – ECS** button and follow the path **Write > Forms > Continue.** If you are using an Access screen, click the **Continue Assessment** button.
2. Select the resident's name and click **OK**.
3. On the Form Type screen, select the Form Type and click **OK**.
4. If the client only has one form of that type started, then the assessment will open. If the client has multiple forms started under the same Form Type, then from the listing that appears, the user must pick which assessment to continue. Select the assessment and click **OK**.
5. Work through and complete what is known. When finished, you can save the changes and close out or submit the form if it's completed.

View Assessment

A user can view a form at any time. When in View mode, the user cannot make any changes to the assessment. The steps below explain how to view a form.

1. Click the orange **View** icon. Or, click the **American Data – ECS** button and follow the path **View > Forms**. If you are using an Access screen, click the **View Assessment** button.
2. Select the resident's name and click **OK**.
3. On the Form Type screen, select the Form Type and click **OK**.
4. On the Form Selection screen, select the Form you wish to view and click **OK**.
5. The assessment will open. The user can move through the assessment and see the information in view-only mode.
6. When finished, click **Close** to close the assessment.

Change Assessment

A user can change a form that has been submitted/locked. This is done when there is an error on the assessment that needs to be corrected. If the assessment is a type that is electronically submitted (MDS RCA, OASIS), and it has been electronically transmitted, do not use the Change feature. You must use the Correct feature explained below in the handout to generate a correction assessment.

The steps below explain how to change a form.

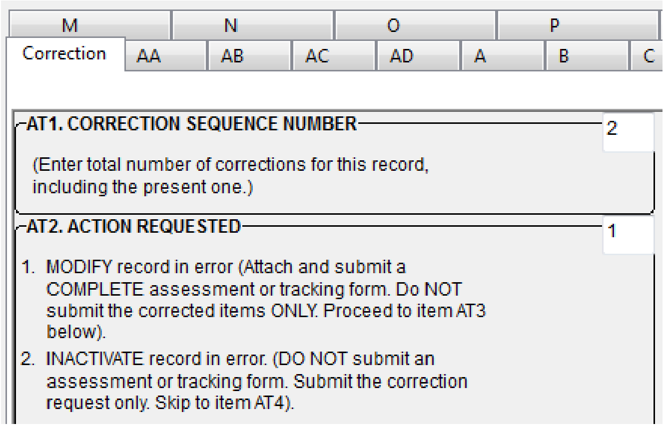
1. Click the **American Data – ECS** button and follow the path **Write > Forms > Change**. If you are using an Access screen, click the **Change Assessment** button.
2. Select the resident's name and click **OK**.
3. On the Form Type screen, select the Form Type and click **OK**.
4. On the Form Selection screen, select the Form you wish to change and click **OK**. The assessment should have a status of "Submitted" in order for a change to be made.
5. Correct the error(s) on the assessment and be sure to save the changes.
6. When finished, click **Status** and then **Submit**. This re-submits/locks the assessment in place. During this process, any old writebacks will be archived and replaced with the new writebacks. The assessment will automatically close when it's finished submitting.

Correct Assessment

A user can correct a form that has been electronically submitted. This is done when there is an error on the assessment that needs to be corrected. This process will generate the correction assessment that is required when this situation occurs.

The steps below explain how to correct a form.

1. Click the **American Data – ECS** button and follow the path **Write > Forms > Correct**. If you are using an Access screen, click the **Correct Assessment** button.
2. Select the resident's name, and click **OK**.
3. On the Form Type screen, select the Form Type and click **OK**.
4. On the Form Selection screen, select the assessment that needs a correction and click **OK**.
5. The assessment will load. In addition to the assessment, there will be a correction page that the user must complete to specify why the form is being corrected.



6. The user must complete the correction page first. This will dictate what will happen with the rest of the form. Once the Correction page is completed, the user can go back through and correct the data.
7. Be sure to save any changes that were made. When finished, click **Status** and then click **Submit** to submit the correction assessment.

Delete Assessment

A user can delete a form that has been started, submitted, or transmitted for a client. American Data strongly suggests that the right to delete forms be given to a minimal number of users.

1. Click the **American Data – ECS** button and follow the path **Write > Forms > Delete**. If you are using an Access screen, click the **Delete Assessment** button.
2. Select the resident's name and click **OK**.
3. On the Form Type screen, select the Form Type and click **OK**.
4. On the Form Selection screen, select the assessment that needs to be deleted and click **OK**. Be careful to select the right assessment. Deleted forms can be restored only with assistance from American Data.
5. Click **OK** to delete the assessment. A confirmation screen will appear. Click **Yes** to confirm the deletion. Click **No** if you're unsure.
6. The form will now be deleted for the client.

Electronic Submission

Form Maker Transmission files can now be batched as .ZIP files to adhere to OASIS C-1 requirements effective January 1, 2015.

1. Click **American Data-ECS**.
2. Click **Write>Forms>Electronic Transfer File**.
3. Select either New or All assessments.
4. Click **List**. Note: this will only work with files that are in XML format. The OASIS C-1 is converted to the XML format, but the OASIS-C is not in XML format.
5. After ensuring you've selected the correct assessment type, click **OK**.
6. Select the desired clients and click **OK**.
7. Be sure the path is set to the desired location on the network to save the file (use the Browse button if necessary). You will need to enter the name of the file/batch. The extension must be .zip, such as C:\OASIS\TransmissionTest.zip.