Forms Training Manual

CarelinkPlus

July 2021

Contents

1 Introduction

This user guide is designed to provide users with an understanding of the functionality of CarelinkPlus Forms. Users will be able to access the CarelinkPlus Forms module through the CarelinkPlus Windows application. The new Forms module for CarelinkPlus has been developed as an improvement to the former Active Care Plans module and in the future will be compatible with mobility and web based solutions to enable Employees to access customised forms for their clients on demand.

1.1 Prerequisites

It is expected that anyone undertaking training in the use of this module will have basic knowledge of the CarelinkPlus application and the ability to navigate competently within System Maintenance. Users will also have basic experience navigating through Carer and Client records within the CarelinkPlus application.

1.2 Learning Outcomes

Expected learning outcomes encompass the ability to create a Form Template that can be used throughout the organisation being represented by the participant. Additional self-learning and practice may be required in order to cement understanding of subject matter for continued long term use.

2 System Maintenance Set up Guide

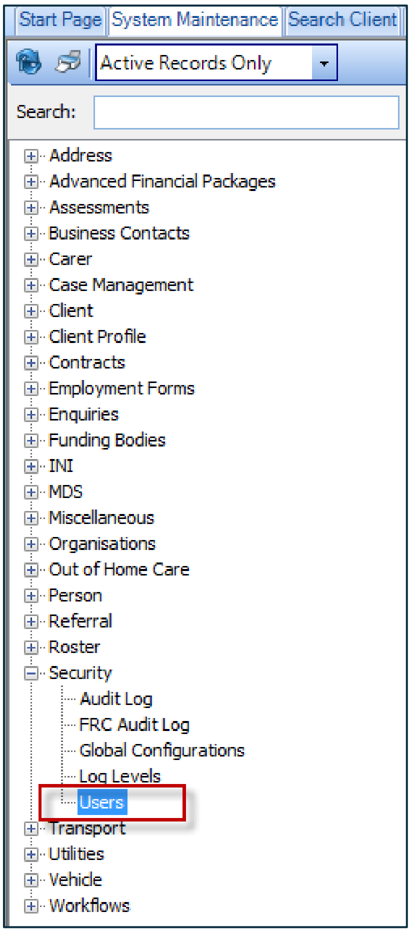
Your System Administrator will need to customise settings within System Maintenance in order for Users to be able to access and create Forms.

The System Maintenance module can be accessed by selecting the System Maintenance option under the 'Utilities' menu on the Start Page, or via clicking the System Maintenance icon in the CarelinkPlus toolbar (as below.)

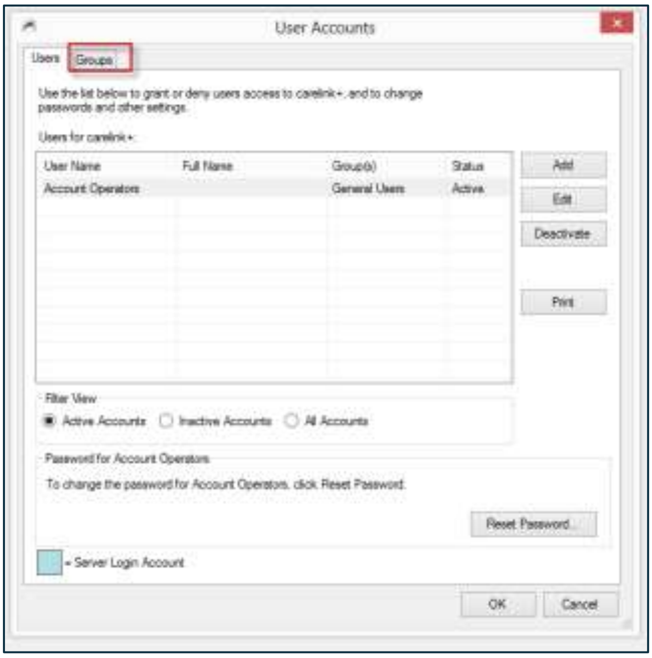
System Maintenance icon: 

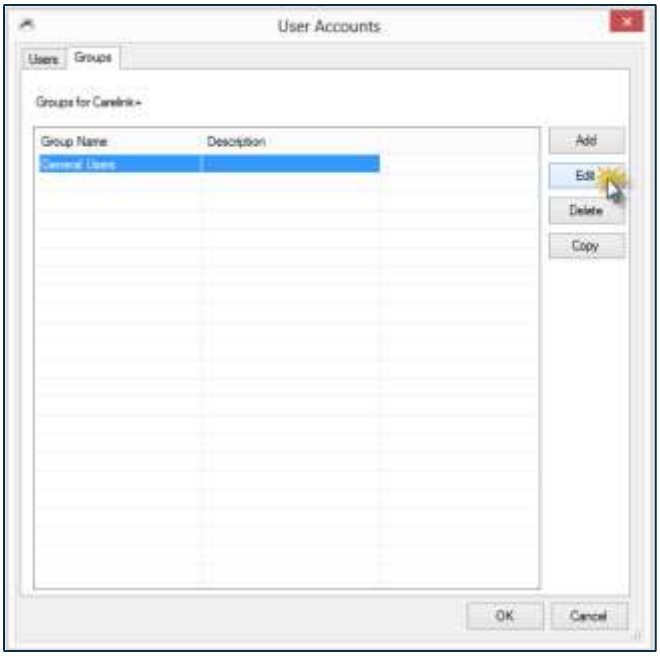
2.1 User Permissions

Within **System Maintenance,** to set up access for the required User Group, your System Administrator will need to navigate to the **Security** node, expand it by clicking the + sign next to the node, and then select **Users**.



From the User Accounts window click the **Groups** Tab to view the current **User Groups** outlined within CarelinkPlus. Select the **Group Name** you would like to alter and click **Edit.**

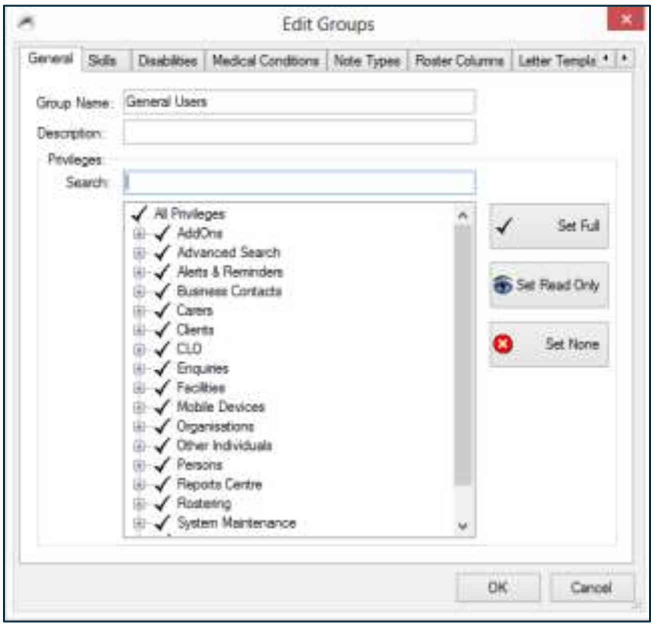


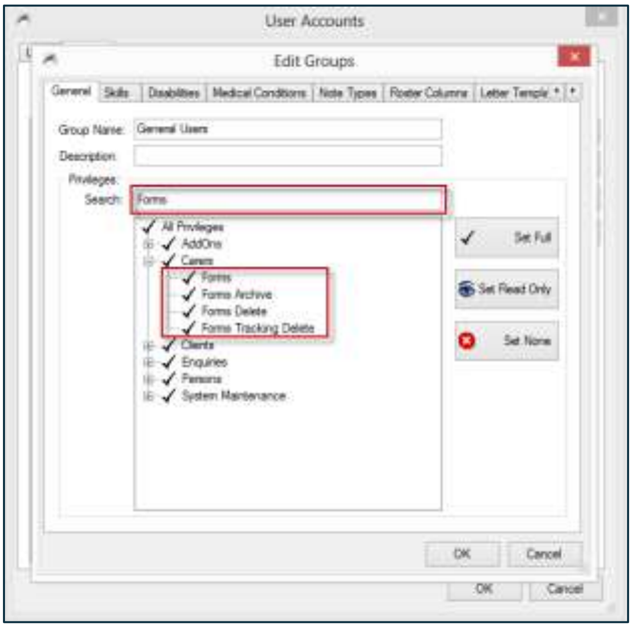


From the **Edit Groups** window on the **General Tab** permissions can be given for the **User Group** to gain access to the **Forms** module.

Typing **Forms** into the search bar will bring up a list of permissions inclusive of the word **Forms**.

CIVICA





There are three sections that may need permissions enabled for **Forms**, dependent on whether or not your organisation will use **Forms** for these areas of CarelinkPlus. These areas are **Carers**, **Clients** and **Enquiries.** Enabling these permissions will allow front end users access to the **Forms** node on a **Carer** record, **Client** record, or/and will allow you to attach **Forms** to an **Enquiry,** if you use the **Enquiries** module within your organisation.

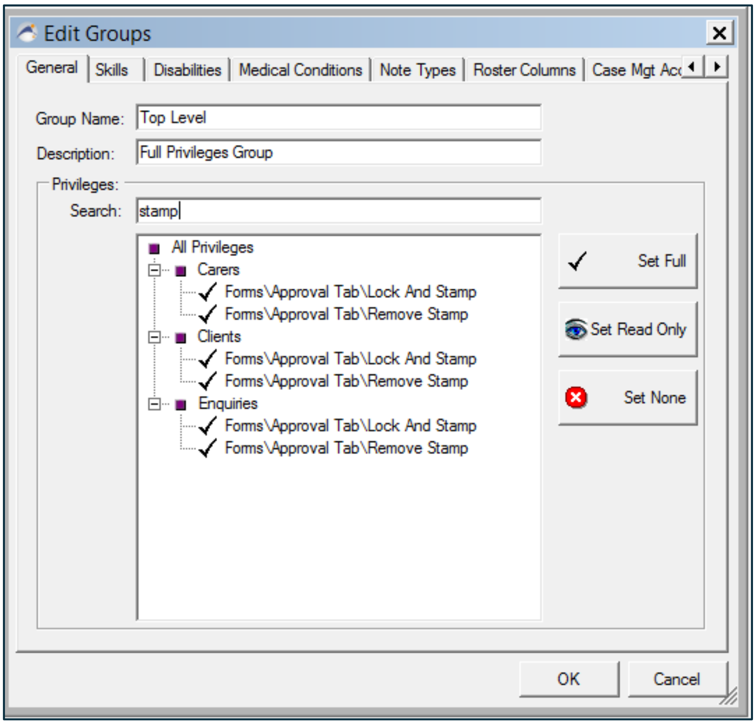
For each entity, there are 3 additional permissions, that can be set to **Full**, **Read Only**, or **None** (Two in the case of Enquiries). These are listed as follows.

Forms Archive: Allows forms that are currently attached to the record to be archived. These forms will be view only.
Forms Delete: Allows forms that are currently attached to the entity to be deleted. These cannot be restored or accessed. Set this permission with caution**.**

Forms Tracking Delete: Fields within the Forms module can have a function enabled called 'Track Changes'. If this option is enabled and changes are made to that field, an historical view will be created within the Forms node. This permission allows deleting of those records, another permission to be defined with caution.

Note: The following applies to the optional feature Lock and Stamping that can be used to add responsibilities to a form so users can 'sign off' for their particular responsibility.

Typing **Stamp** into the search bar will bring up a list of permissions inclusive of the word **Stamp**.



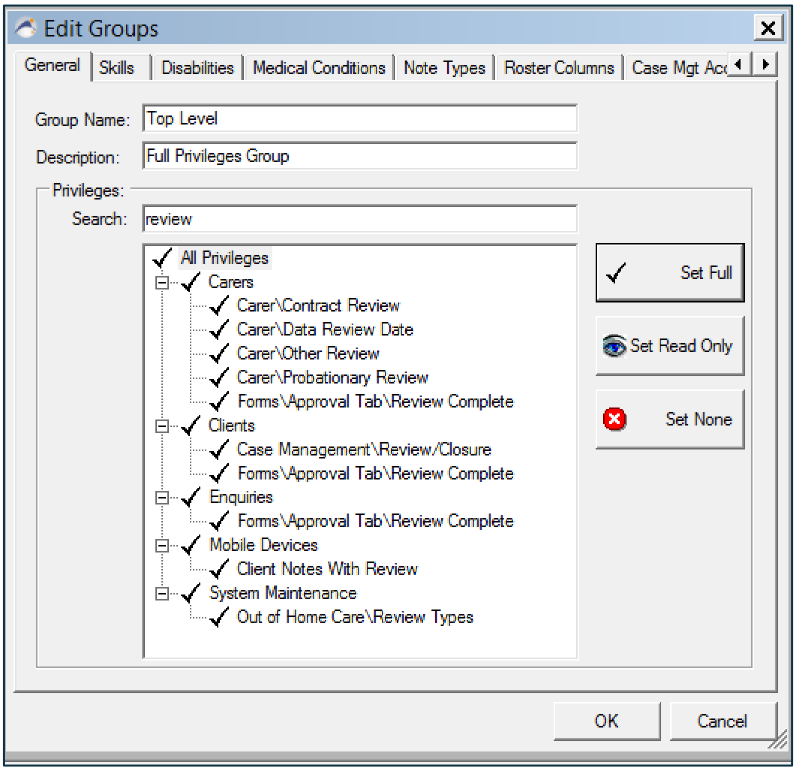
Lock and Stamp: This controls access to the 'Lock and Stamp' button on the form's Approval tab. If set to full, the user will have access to the 'Lock and Stamp' button and will be allowed to stamp and lock that form.

Remove Stamp: This controls access to the 'Remove Stamp' button on the form's Approvals tab. If set to full, the user will have access to the Remove button, allowing them to undo a stamp.

*For further information regarding the **Stamp and Lock** configuration please contact Carelink on (03) 5228 3800 or alternatively email CareSupport@Civica.com.au or customersolutions@Civica.com.au*

Note: The following Review permission also applies to the optional feature Lock and Stamping responsibility.

Typing **Review** into the search bar will bring up a list of permissions inclusive of the word **Review**.



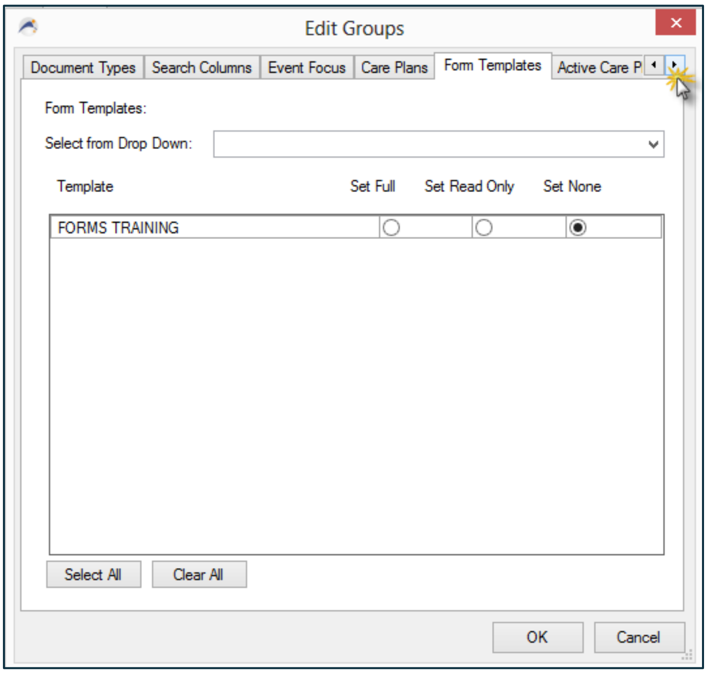
Review Complete: This controls access to the Review button on the forms list that appears within the Forms node. This button is used only on forms where a stamp has generated a review date for the form. If you have access to this option you can select a form in the list that has a Review Date and press the Review button to mark the form as review complete.

The final stage in setting up Permissions lies within the **Edit Groups** window and is accessed by scrolling through to the 12th tab until you reach the **Form Templates** Tab. Clicking it will list any and all existing Forms Templates.

Forms Templates tab allows you to set access permissions on a form by form basis. This can be done for each User Group within your organisation, as different User Groups may require access to different forms.
Set Full: Users can add and populate forms on the Carer, Client or Enquiry section of CarelinkPlus.

Set Read Only: Users can view but not manipulate the data within a particular form, nor can they add a form to an entity.

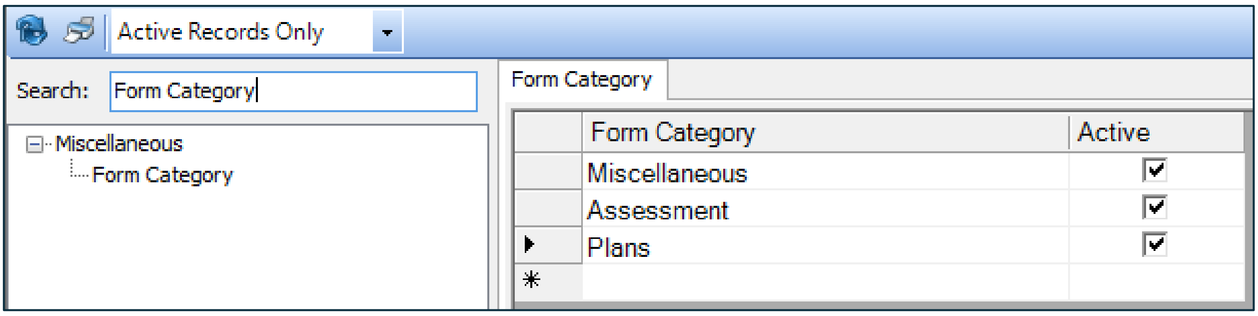
Set None: Users will not be able to access this form to add to a Carer, Client or Enquiry.



Clicking **OK** on the **Edit Groups** Window and **OK** again on the **User Accounts** window will save your changes and take you back to System Maintenance. Clicking the Refresh button within the main System Maintenance screen will refresh the newly enabled permissions, if there have been any.
Refresh button location within System Maintenance:

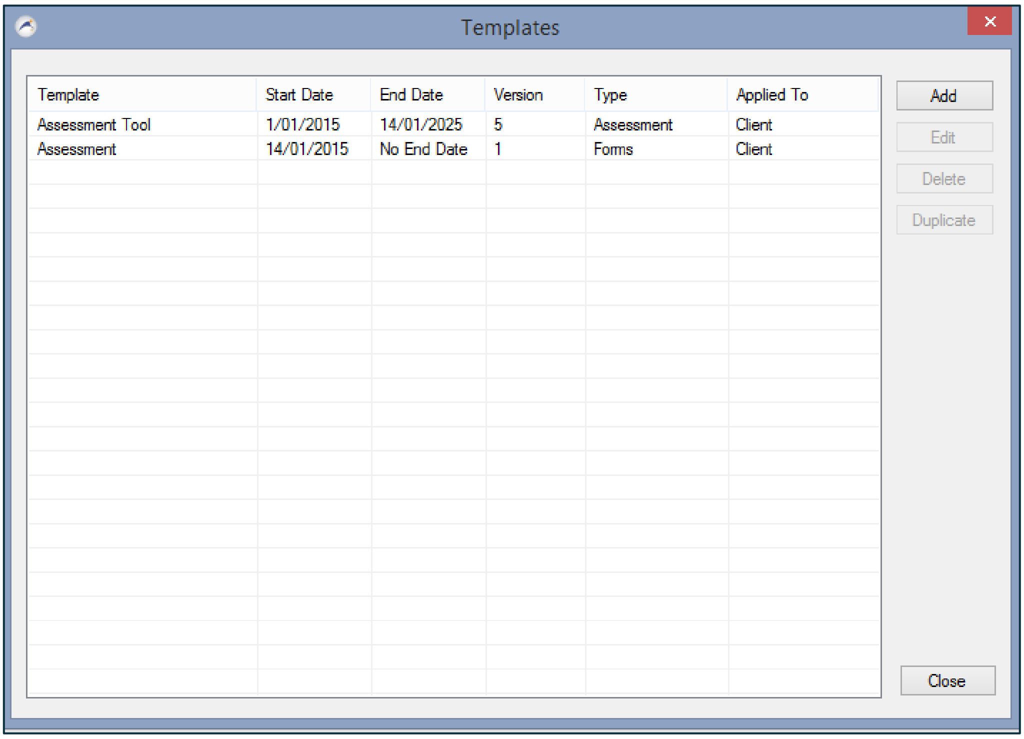
2.2 Defining Forms Categories

There may be a requirement within your organisation to have several different categories for your **Forms**, i.e. Assessment, Review etc. These categories can be defined within **System Maintenance > Miscellaneous > Form Category.** You are able to enter as many Form Categories as required.



3 Creating new Forms templates

To add a new form select **System Maintenance** > **Miscellaneous** > **Forms**
When selected, the Templates form lists all of the templates that have been defined.



Following are descriptions of the main columns displayed on the **Templates** form:

Column name	Description
Template	This is the name that was given for this template and is what users will see when they want to select and fill a form or assessment. Each template must have a unique name.
Start / End Date	This is used to specify a date range within which this form can be used. You can backdate the start date and leave no end date to allow the form to be used immediately. A form can only be added to a client, carer, or enquiry within the date range specified within the template. You may, for example, have a new version of a specific form template that is to be used from the first of next month. In this case you would set the end date for the current form to the last day of the current month and on the new form, set the start date to the first day of next month. This way the old one will no longer be available for selection after the end of the month and the new one will then replace it.
Version	By default when a template is added it will be shown as version 1. If you want to add a new version of a template that is to replace the existing one, you can select the template in the list and press the Duplicate button. You then have the option of creating a new version which will Lock the current version and display the editor allowing you to make the changes needed for this version. On Saving the version number will be updated immediately. New versions replace the existing version of that template for any new forms added to a client/carer/enquiry in the front end.

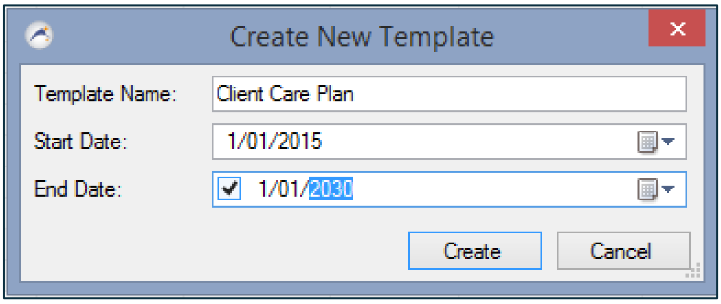
	Previous versions that were already added to a person's record can still be viewed or edited if required. *This will have no impact of Print Templates*.
Type	This shows whether the template is a Form or an Assessment. Forms can be added to a client or carer record through their Forms node. Assessment forms can be added in the client's Assessments node.
Applied To	This indicates whether the Template applies to client, carer or enquiry. A template is record type specific as it can contain fields from that record type. For example a client template can contain fields that are obtained from the client records, so those templates cannot be used for carers or enquiries.

Following are descriptions of the buttons available on the right of the **Templates** form:

Form Control	Description
Add	This is used to add a new template. A form will be displayed that allows you to enter the details for the new template.
Edit	To edit a template you can click this Edit button or double click on the template itself. You can double-click on a template to edit it or select a template and press the edit button.
Delete	This is used to permanently delete a template so it can no longer be used.
Duplicate	This is used to either upgrade a template to a new version or create a new copy.
Close	Closes this form and returns you to the System Maintenance menu.

Alert: ***Delete*** will delete ***all*** existing records that were based on the template, regardless of if they are active or archived so use with caution.

Select the **Add** button on the Templates form to open the **Create New Template** option.



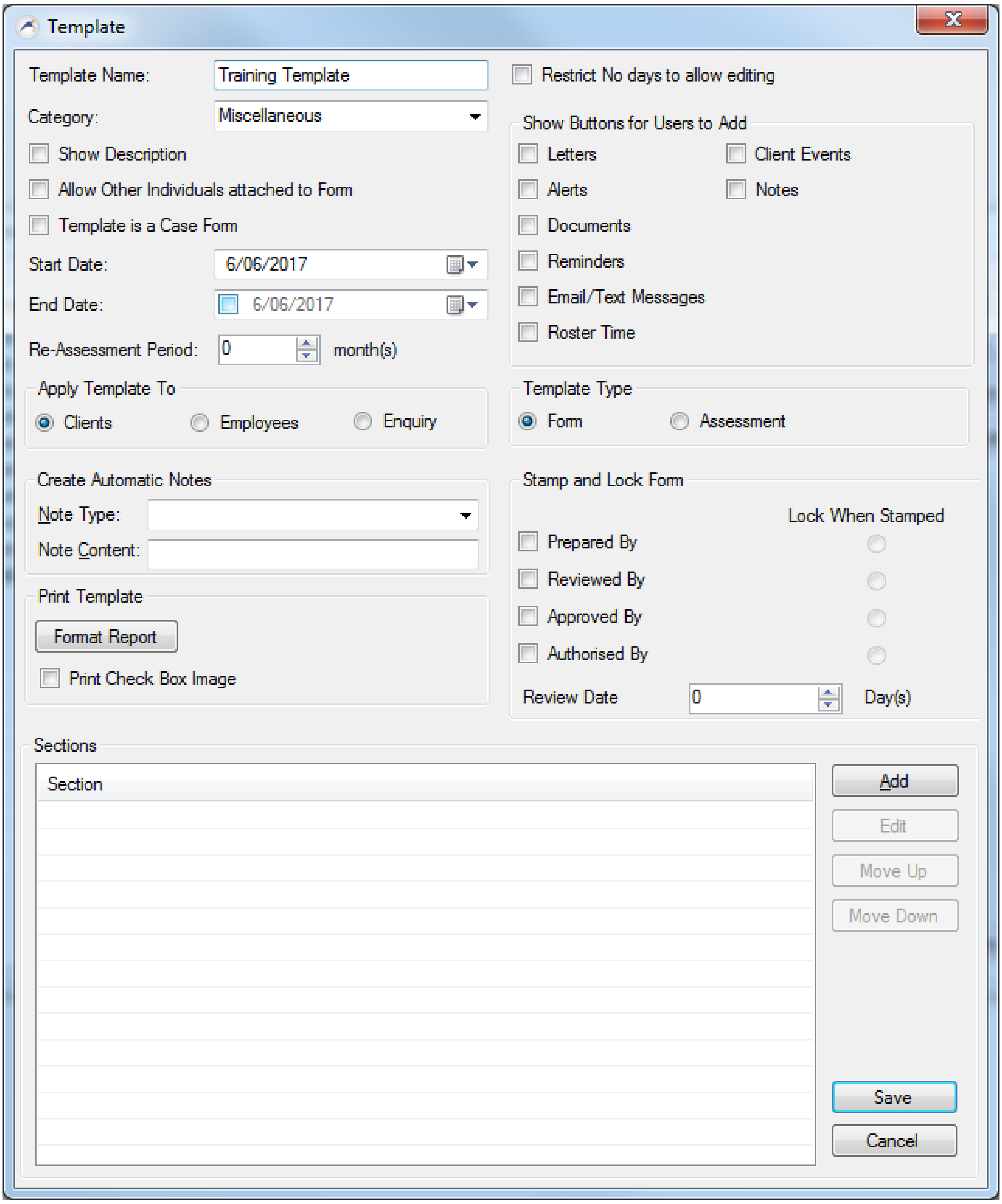
- Enter the Template Name
- Enter the Start Date (this can be back dated if required)
- Enter the End Date (Untick for **No end date**)
- Select the Create Button

Note: It is important to note that being outside the date range only stops you from being able to add new forms to the person's record using that template. If the form was already added to a person's record or an enquiry and the end date for the template has now passed, users will still be allowed to view or edit the record (if edit rules allow).

3.1 Template Form Overview

The image below shows the main page of a form template. This is displayed when you are adding or editing a form template.

Note: Editing forms that are already in use changes all instances of that form for the client, carer, or enquiry, even those that have already been saved. Editing existing forms generally should only be used to correct minor issues or add new sections.



Following are descriptions of the main options displayed on the **Template** form:

Template Name: This is the name for this template. The templates must have unique names. It is this name that is displayed in the lists when selecting a form or assessment tool.

Category: This is used to group forms/assessment tools by category. The list of categories from which you can select are defined through System Maintenance > Miscellaneous > Form Category.

Show Description: If this option is ticked, a description text box is added to the form, allowing user to add additional text for the specific form when completing it.

Allow Other Individuals Attached to this Form: This only applies to Client/Carer forms. On the Client or Carer Forms page, there is a section called Attached Individuals. If this option is ticked for a form template and that form is added to the person's record, on selecting that form in the forms list, the Attached Individuals - Add button will be enabled. This allows you to link the selected form to other individuals. If you link it to another carer or client, that form will also be displayed on their Forms node. It can be selected for viewing their Forms node but it cannot be edited from there.

Template is a Case Form: This only applies if you have the optional Department Case Number module. The module allows you to assign a case number on a person's Department record. If this "Template is a case form" option is ticked on a form template, you will only be allowed to add that form to a person's record where that person has department record with a case number defined. In this circumstance it will also be added automatically to all other person's that have that same case number. If they do not have a department case number and this option is ticked for a template, then a message will be displayed indicating that they do not have a department case number and you will not be able to add the form for that person.

Start / End Date: This is used to specify a date range within which this form can be used

Re-Assessment Period (months): If a number is entered in this field, a re-assessment field is displayed on the person's record form that is automatically populated with a reassessment date based on that many months after the form has been created. There is also a reminder button next to the field when adding a form that allows you to set a reminder based on the calculated reassessment date. (The calculated date can be cleared or overridden if necessary when adding the form to the person's record.)

Apply Template To: This allows you to specify whether the template applies to Clients, Carers, or Enquiries. You must pick only one. As well as indicating the entity to which this template applies, it also limits the fields available in the sections to that particular entity type. This option must be set to client if you want to create an Assessment form.

Template Type: This allows you to specify whether this is a Form or an Assessment. The Assessment option is only available if the template applies to Clients. In this case the form becomes an Assessment Tool that can be added through the Assessment Tool section under the client's Assessments node.

Restrict No of Days: If you tick this option, you will then be able to set the number of days after adding that the form will no longer allow editing. If this option is not ticked, forms added to the person's record can be edited any time after they have been added

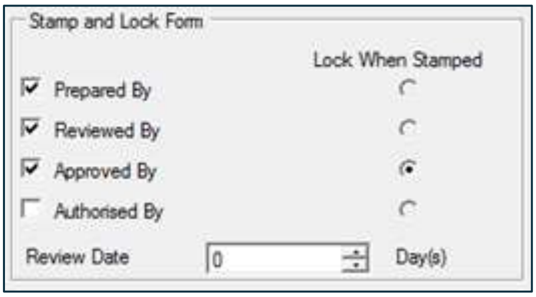
Show Buttons for users to add	
Events	If you have this optional module, this is used to record any significant events that occur in relation to the Client or family.
Roster	This option allows you to create a roster shift record directly from the form.
Note	This allows you to add a note that is then attached to the person's notes node.
Documents	This allows you to add a document to the Attached Documents node for this individual directly from the form.
Email / SMS	This allows you to generate an Email or SMS message directly from the form.
Letters	This option can be used to create a letter directly from the form. The Letters feature allows you to choose from predefined letter templates that contain fields that are populated automatically (or you can manually create one). These form letters can then be added to the person's record as attached documents, or printed out to be sent to the person
Reminder	This is used to add a reminder in relation to the form.
Alerts	This allows the user to add an Alert directly from the form rather than having to go to the person's Alert node.

Create Automatic Note Types: Each time this form is created; a note can be automatically created and added to the person’s Notes node. Select from the **Note Type** dropdown the note type you would like the automatic note to have. We recommend creating a new note type in System Maintenance specifically for this action, to help with filtering. Then enter in the field by **Note Content** the text required in the automatic note. This could be as simple to ‘Form created’ to something giving more context to why the form is created.**Stamp and Lock**

Form: For each of the options in the Stamp and Lock Plan section, there are two settings; a tick box to enable that particular stamp on the approvals tab of the form and an option to indicate that the form is to be locked when stamped.

The option to lock the form can only be set for the last (lowest on the screen) option. This indicates that selecting the Stamp option for this entry on the form will lock the form and not allow any more editing once it has been Stamped.

If you want to unset the 'Lock When Stamped' option once it has been set on this form, you must untick that field and re-tick it again. the field will be re-enabled without the lock option selected



*For further information regarding the **Stamp and Lock** configuration please contact Carelink on (03) 5228 3800 or alternatively email CareSupport@Civica.com.au or customersolutions@Civica.com.au*

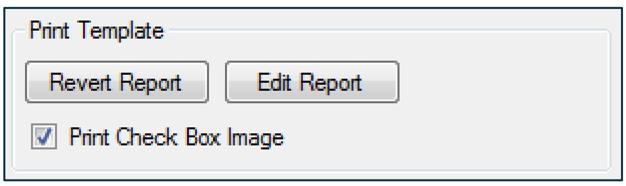
Sections: This is where the contents of the form are specified. You add sections which are basically pages or tabs that apply to the form. Within each of those sections you add all of the fields, questions, workflows and other settings required.

Following are descriptions of the main controls or buttons available on the **Template** form:

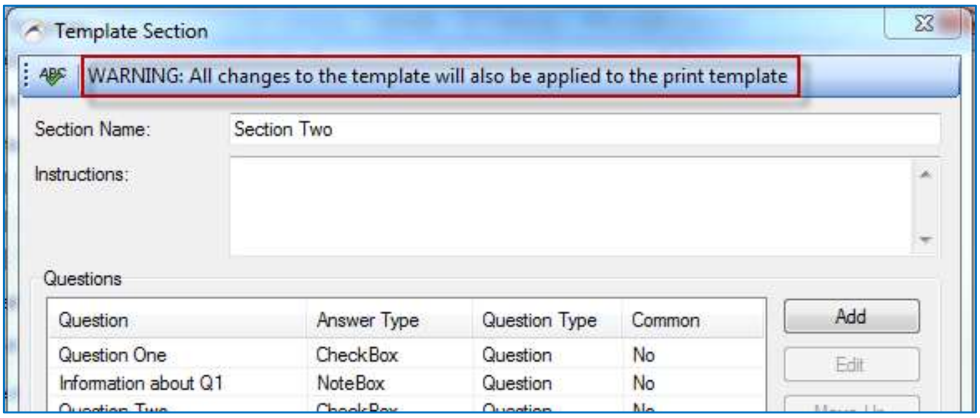
Section form controls	
Add	Press the Add button to add a new section to this template. Sections are basically pages or tabs that apply to the form. Within each of those sections you add all of the fields, questions, workflows and other settings required.
Edit	You can edit a section by selecting the section in the list and pressing the edit button or by double-clicking on the section in the list. You will then be presented with a form that will allow you to edit the section and its contents.
Delete	Select a template and press the Delete button to remove that section and its contents from the template. Users can use the shift or control keys and select multiple sections; all of the selected sections will be deleted.
Move Up / Move Down	This allows you to reorder the Sections for this template. This determines the order that the tabbed forms appear across the top of the form when being filled in. The topmost section in the sections list is the first (leftmost) tab on the form.
Save	Saves any changes made on this form and closes the Template form. It is important to note that changes made to the sections have their own save button and are saved regardless of whether this save button is used.
Cancel	This cancels any changes on this form and closes the form. It is important to note that changes made to the sections have their own save button and are saved regardless of whether this cancel button is used.

3.2 Print Template

Print Templates are an optional module that can be added to Forms. Once enabled buttons will be added to allow system administrators to open Visual Studio through CarelinkPlus, and edit the print layout of the form.



Once a print layout has been saved, the form template will display a warning at the top of the window.

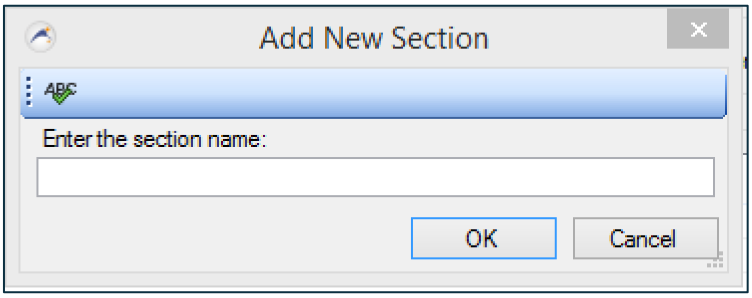


For further information regarding this module please contact Carelink on (03) 5228 3800 or alternatively email CareSupport@Civica.com.au *or* customersolutions@Civica.com.au

3.3 Adding Form Sections

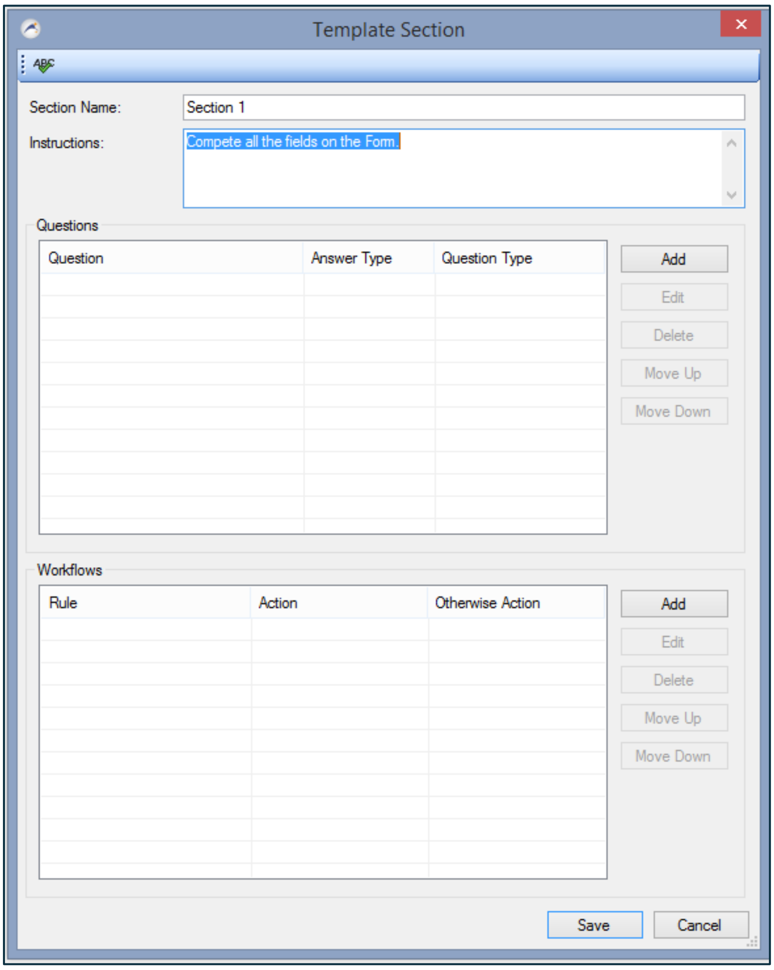
To add a section to the form select the **Add** Button. The **Add New Section Form** will open. Enter the **Section Name** and select **OK** to continue.

To check your spelling, select the spellcheck button: 



3.4 Form Section Template

Sections represent the pages or tabs for a form that hold all of the questions and fields. A Forms Template can have many sections. Within each section you will define all of the database fields, questions, workflows and rules that will apply when filling in a form. If you have multiple sections for a template, they are shown as tabs across the top of the form when it is being added or edited by a user.



On the Template Section Form complete the following:

Section Name: This is the name of this page on the form. It is this name that is shown in the tab when the form is being used.

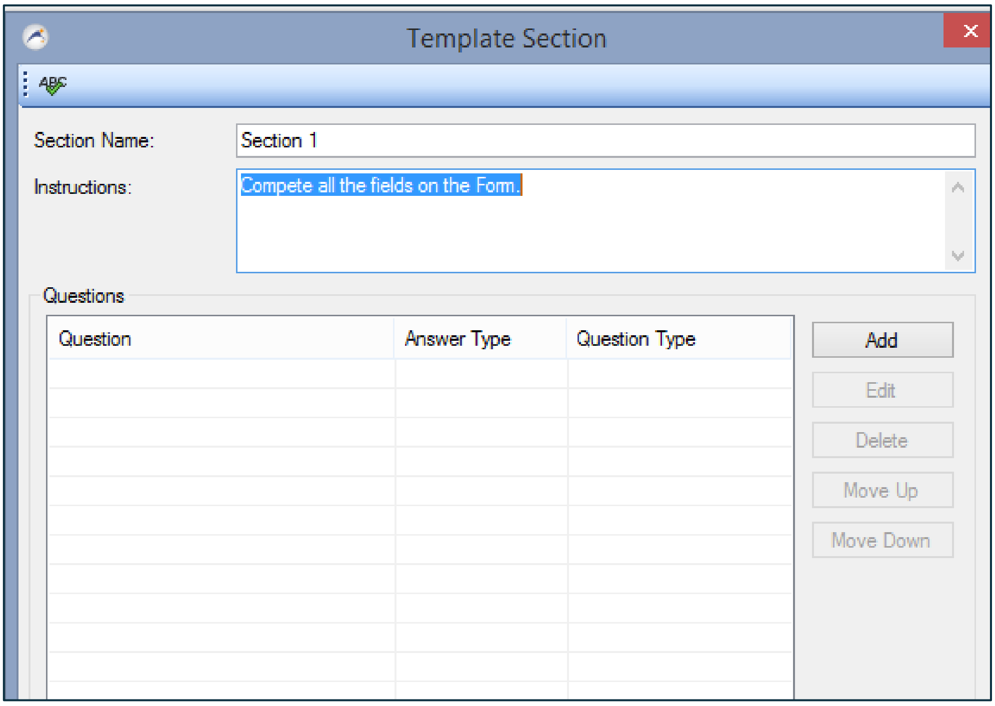
Instructions: The text you enter here is shown at the top of the section when the user is filling in the form. It can be used for whatever purpose you like. Disclaimers or Instructions. Keep in mind that it is part of the form data in that it is also included if the form is printed.

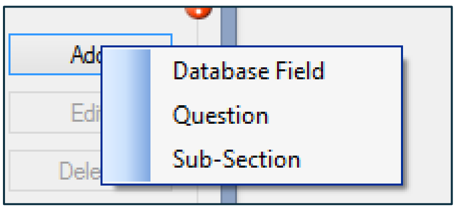
Questions: Lists all of the questions and subsections of the viewed Section, as well as the order they will be viewed in.

Workflows: Lists all of the workflows created for this section.

3.5 Adding Questions

When adding questions, by selecting the **Add** button next to the Questions section of the form, you will be prompted to select what type of field you would like to add.

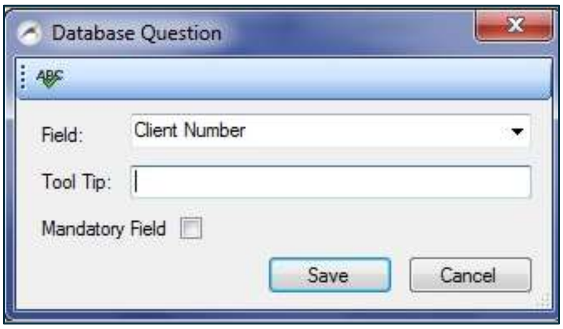




Database Fields

These fields are not questions as such, but allow you to add fields from the person's record which obtains their data from other forms and nodes in CarelinkPlus. These include various entity specific fields such as the person's name fields, their address and phone numbers. Changing contents of a field that is included in a form updates it everywhere.

Whilst most fields are editable, some fields are not and include disabilities, allergies and medication. For a list of database fields, please refer to the appendix at Section 6.1: Database fields.

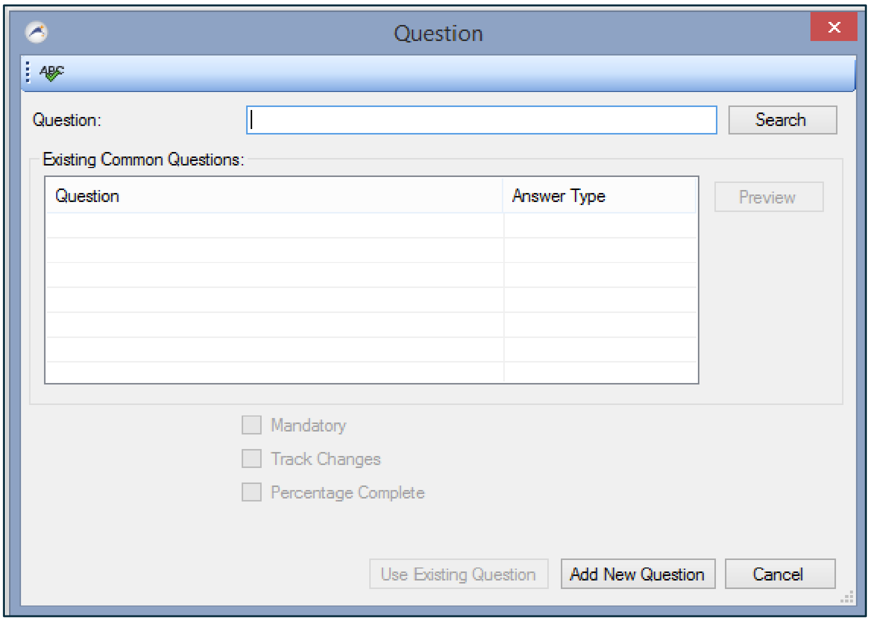


Tool Tip: The text you enter here shows up as a tool tip that pops up when a user is filling in the form by hovering their mouse over the field. Tool Tips are optional.

Mandatory Field: Ticking this box makes the field mandatory. Mandatory fields must contain data before the form can be saved.

Questions

These are questions that you can create that will be shown on the form. The format for the response for each question can be defined as a specific field type. This allows you to define questions where the user can respond by filling in a text field, selecting from a drop down list, tick check boxes, select a date, type in a paragraph, etc. This is also used to add Section Totals or Formula fields for calculations.



Search: This is used to find common questions users have created.

Preview: This will show the question's setup on an un-editable New Question window.

Add New Question: When selected allows you to add a new question to a form.

Use Existing Question: If the question you want to use is displayed, you can select the question in the list and press the **Use Existing Question** button. It will be added automatically with you returned to the Section form

Cancel: Closes the Add Question form without adding a question to the section.

Additional Options: Each question can have additional options added which may change how they behave. Depending upon the Answer Type selected, different options (see above) are made available on the form.

Mandatory: If this option is ticked, when a user is filling in the form, this question is mandatory and must be answered before they will be allowed to save the form

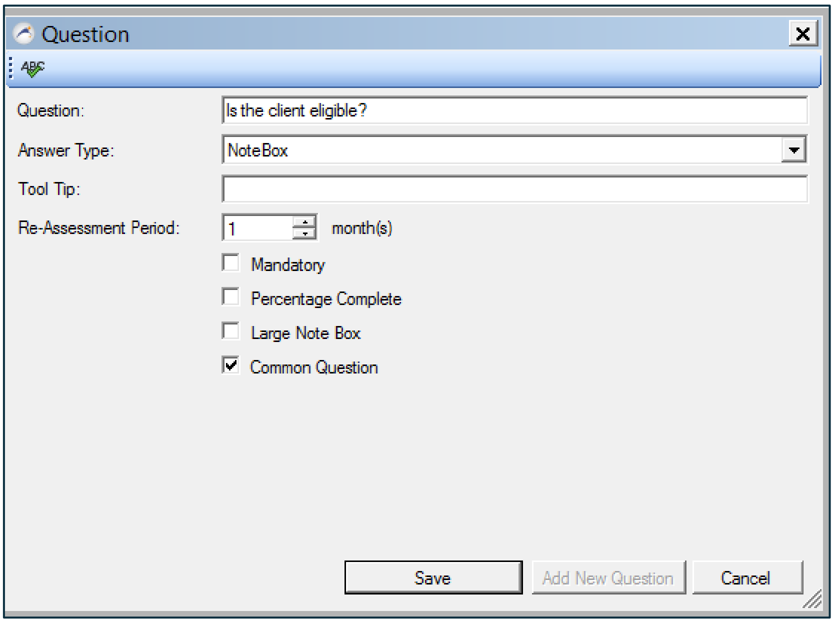
Track Changes: For each question this is selected for, it will track all changes to the field. When the question is selected in the form it will show the history of previous answers across previous forms. These will also display on the tracking section of the client forms window.

Percentage Complete: If this option is ticked, then the question will count towards the percentage complete indicator for the form.

Image: Some questions will allow an image to be uploaded along with the question. This is added by the sys admin creating the form, not the user entering the form, unlike the **Image** field mentioned on the following page.

Adding a New Question

When adding a new question, a form is displayed that allows you to set or alter the Question text. Specify the Answer Type and alter various other settings for the question.



Answer Type	Description
Check Box	This is used for on /off (Yes / No) type questions where the answer is to tick or untick the box.
Check Box Multiple	This is used where the answer to the question can be to tick one or more check boxes.
Date Field	This allows the user to enter a date.
Drop Down List	This drop down list allows the user to select a single answer from a specific set of values
Drop Down List with Scoring	This drop down list allows the user to select a single answer from a specific set of values a score is generated based on the answer selected.
Electronic Signature	Provides a space where a signature can be drawn directly on the screen into a signature window.
Formula Field	Formula fields are used to perform complex mathematical / statistical calculations. The calculations include such operations as count, subtraction, multiplication, average, power, min and max. Additional information can be found in Appendix 1
Image	This field allows the front end user to upload an image when entering the form.
Label	A label does not require an answer. It text that is usually used to create a heading or comment on the form.

Note Box	There are two types of note box's that can be added to a form, standard and large. Both options allow you to store the same amount of text however for users entering data a large note box will allow them to view more information before having to scroll.
Number Field	This provides a field that only accepts the entry of numbers (up to two decimal places if necessary)
Number Only Text Box	This field is a text field but allows you to only enter digits. This is similar to a NumberField in that it is numeric only, except that it is better suited for percentage complete use as it can be blank and will only count towards the percentage once you have entered a value.
Numeric Drop Down List	This is the same a standard drop down list except that you can only specify numbers for the list of options and the selected number will also be used as a score.
Radio Button	These are used where there are multiple choices, but the user can only select one.
Sum	Used to show the sum of all of the scores that apply to the current section.
Text Box	This gives a standard text field that is used to enter a single row of text.
Time Field	This allows you to add a field that allows entry of the time in standard hours and minutes. For example 11:00 AM

Common Questions

Common Questions are a special type of reusable question. Care should be taken when using common questions. They have some very important features:

- A common Question is defined once and then saved.

  When adding a question to a form section, you can then define that question as a common question to reuse it on as many different forms or sections as required. Once a common question has been created you can look it up and select it any time you need to add that question to a form/section. These questions can be used for any form or assessment. For example, if when creating an Assessment form, you create a common question, you can also re-use it for other client, carer, or enquiry forms.

- They behave as new database fields for an individual.

  The answer given to a common question is also common per individual. If you have a common question on multiple forms, sections or assessments, it will be populated automatically based on the last answer that was given for that common question for that specific individual. Changing it on one form, changes it everywhere for that person (even on forms that were previously saved). It is similar to including a database field on a form. For example, if you change the person's name in a database, it will be changed wherever the person's name is used. Common questions behave in a similar fashion. There is one exception in regards to updating the answers to common questions: Once a form has been archived, the answer for any common questions on the archived form are saved as a fixed value at the point in time it was archived. Updating the answer to a common question will affect all forms for that individual except for those that have been archived.

- Common Answers are persistent after a delete.

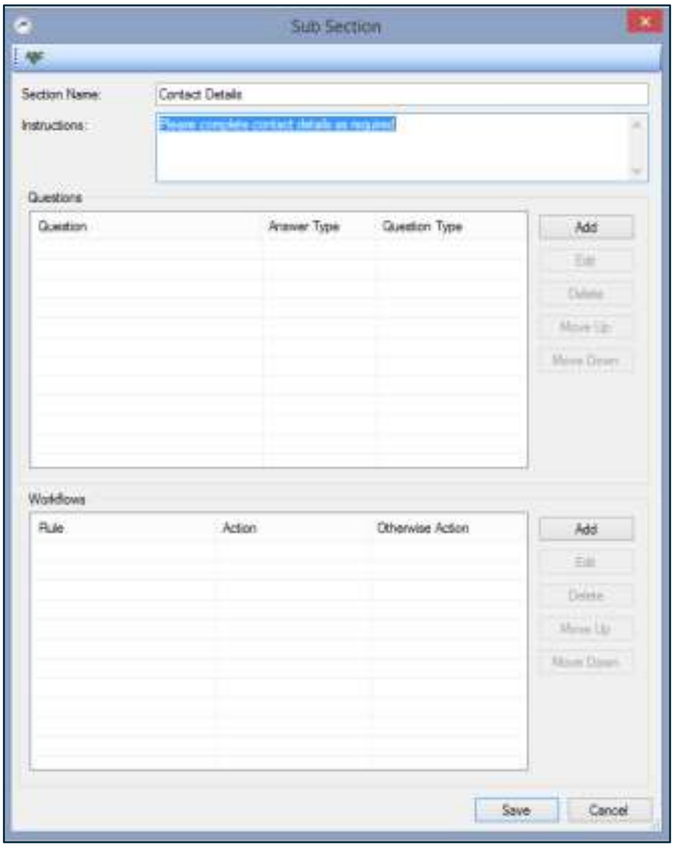
When you add a form for a client or enquiry that has common questions and you answer those questions, the answer is saved for that entity. The answer to that common question, for that person or enquiry, is now automatically populated for that individual on any form that in which is used. If you then delete that person's form and add a form (that has that common question on it) later, it will be automatically populated with the common question's answer.

For example: If a client has a preferred day of service, this common question could be on three types of assessment forms. This way, regardless of which form is opened and entered, the common question always has the latest answer. So if the Client prefers Tuesday, this will be shown on all of the forms. If one of the forms is updated and now the preferred day is Wednesday, all of the forms will now show Wednesday. If the forms are deleted, and then added at a later date, they will still show Wednesday until updated again.

3.5.1 Sub-Sections

A section can also have subsections (each of which then has its own fields, questions and workflows). Subsections are used where you want to add multiple records within a section.

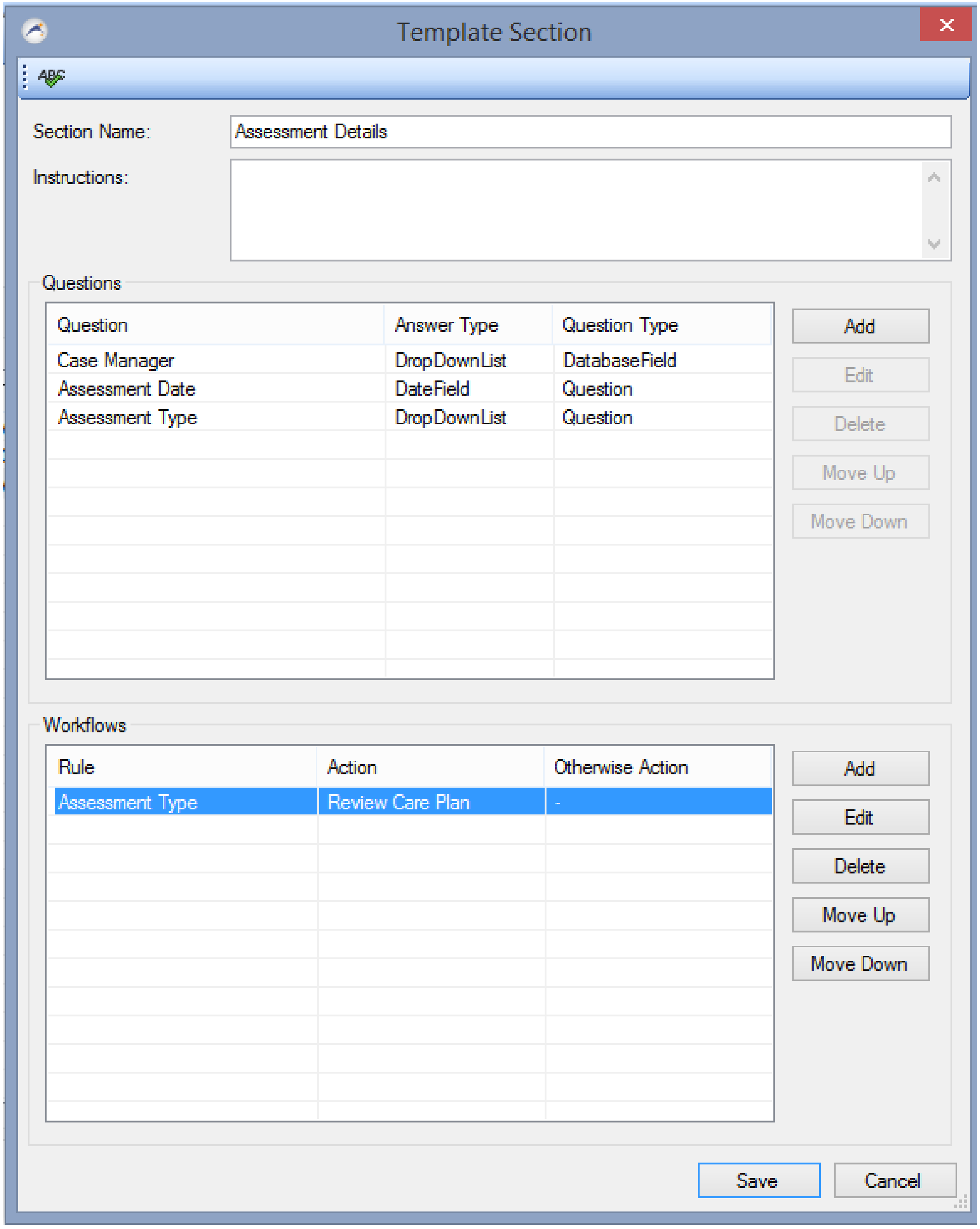
For example, you may have a requirement on a form section to collect contact details for a person. They may have multiple contact details. You can achieve this by adding a subsection to the current section to collect each contact. When a user is filling in the form the sub section will be represented as a list box with Add, Edit, and Delete buttons. They could then add as many contact details as required. A subsection has the same options for questions and workflows as a full section.



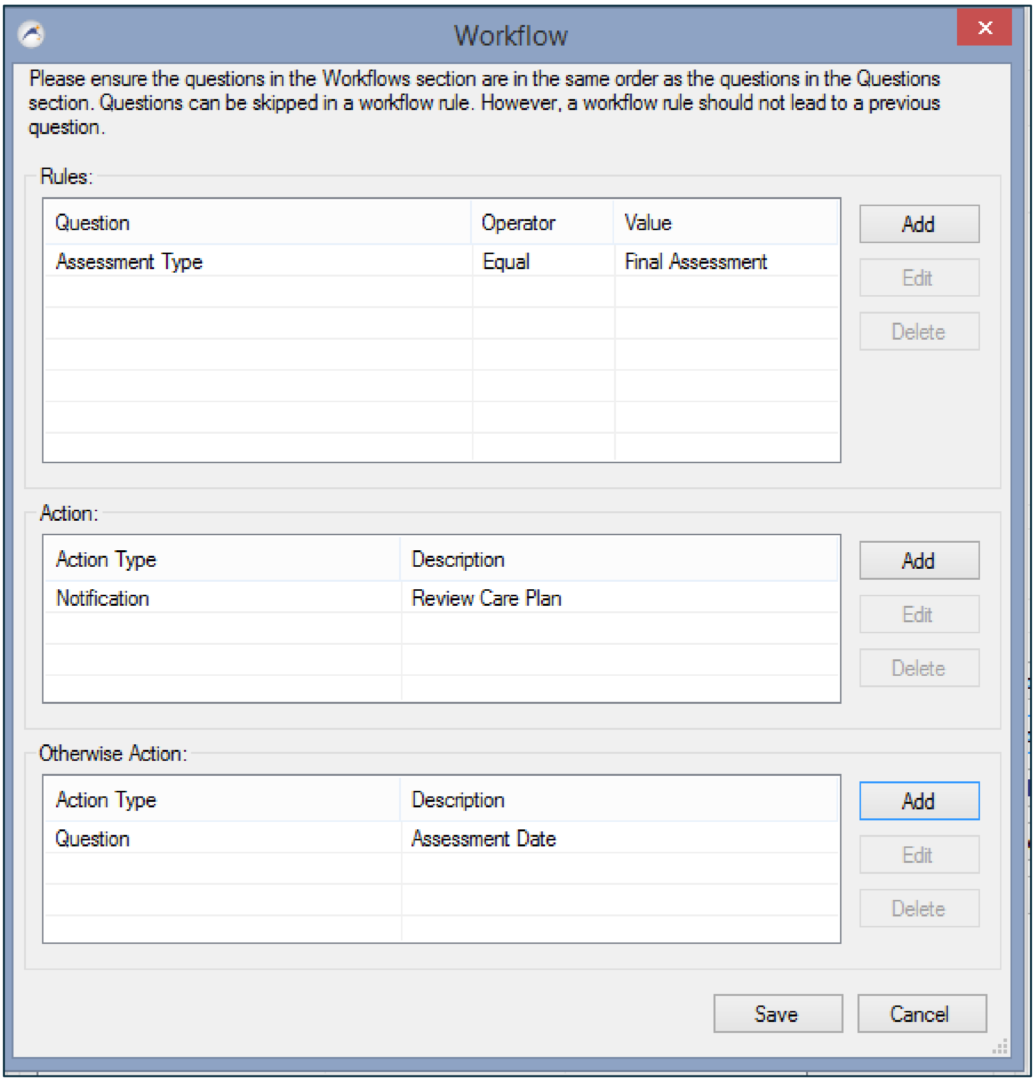
3.6 Workflows

Workflows can be added to a section or subsection. Multiple workflows can be added and the order adjusted.

Workflows can be added to a section by selecting the **Add** button.

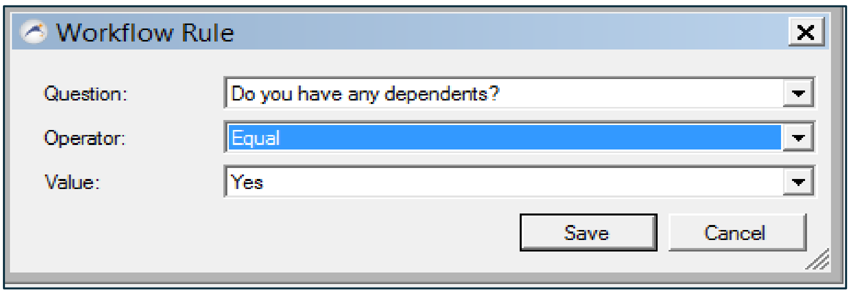


The below workflow form is broken into three parts: **Rules, Action, and Otherwise Action.** These function as you would expect for basic If/Then/Else logic.



3.6.1 Rules

When adding a rule you must select a Question as the starting point. Then under Operator you and then specify a condition to go with the question such as Equal To, or Greater Than. You then choose the value for the condition to match. The type of values available will depend on the answer type for the selected question.

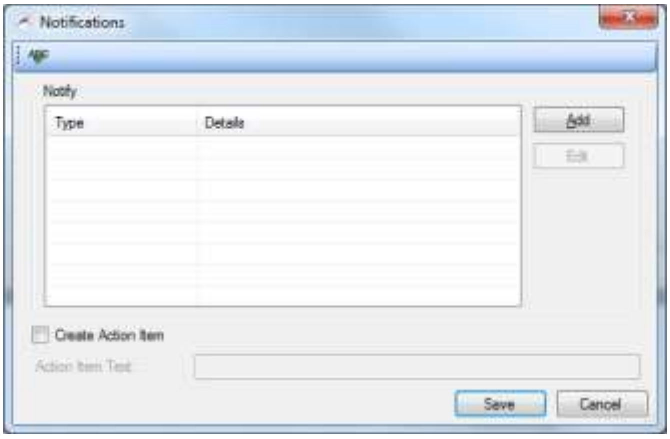


3.6.2 Action

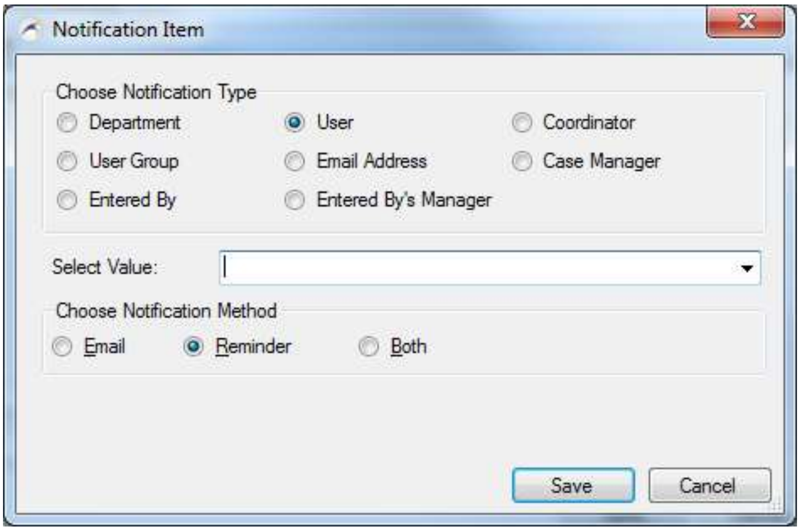
Actions are performed once a rule condition is met. There are a number of available actions available:

Action	Description
Go To Question	This is used to jump to a specific question and hide all other questions from the original question up to the one you go to. When you add this action, you will be presented with a form that allows you to choose the question to go to if the rules are met. You can choose from any of the questions in the section excluding those used in the rules list for this workflow.
Go To Section	This allows you to jump to another section based on the answer(s) given in this section. When this action is selected, you are able to choose from any of the other sections on the form.
Display Message	This action will display text on the form under the question in the rule that triggered it. If there are multiple questions in the rules section for this workflow, the message will be displayed under each question. When this action is selected, you are presented with a form that allows you to enter the text that is to be displayed if the condition is met.
Create New Form	This is used to automatically add another form to the person's record. It is flagged once added so that the new form is only ever added once regardless of the changes or edits made to the original form. When this option is selected, you can select one of the other forms templates. When a user is filling in a form and it triggers a workflow rule that will create a new form, the form will be added to the person's Forms list automatically **once the current form is saved**. This action is recorded and will only trigger once so that future edits of the original form do not continually add new copies of the form via the workflow action.
Create Notification	This allows you to generate a notification either as a reminder or as an email or add an action point. When creating this action, you can select various entity groups that exist in CarelinkPlus, such as Coordinator, Entered By, User Group, or any specific email addresses, etc. Depending on the entity type, you can choose whether to send an email or create a CarelinkPlus reminder. **Note**: If you select the **Create Action Item** option this will appear in the Action item for the related Form in the Forms node under Client.
Conditional Percentage Complete	This can be used to designate certain questions as counting towards the percentage complete based on the responses for other answers. When this option is selected, you can then choose from a list of questions on the form that normally do not count towards the percentage complete. You can tick the ones that should now count.

Create Notification: The action to create a notification is configured through multiple windows. So steps have been detailed below.



The first window will be blank, and from here selecting **Add** will allow you to create the notifications.

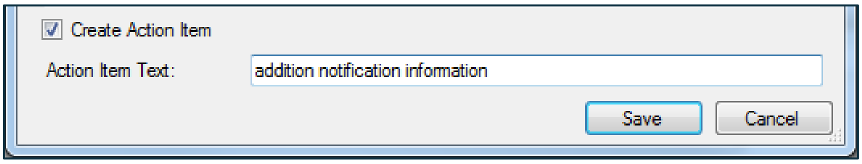


The second window creates the notification settings. The radio buttons under **Choose Notification Type** determine what group the user would like to select from.

Notification Type	Who will be notified
Department	Select from the list of CarelinkPlus departments, all users in that department will get the notification.
User	Select one CarelinkPlus user to get the notification.
Coordinator	If the person (client or employee) that the form was created for has a coordinator, this will automatically send the user account that is linked to that coordinator person record. (*set in security > users>person record*),
User Group	Select from the list of CarelinkPlus user groups, all users in that user group will get the notification.
Email Address	Enter in the value any email address, and the notification is sent to that mailbox.
Case Manager	(*Client Only Forms*) If the client that the form was created for has a case manager, this will automatically send the notification to whomever it is at the time.
Entered by	The user that entered the form will get the notification.
Entered By's Manager	If the user entering the form has a manager (*set in security > users*), this will automatically send the notification to whomever it is at the time.

Then the **Select Value** dropdown will show all of the options from the above choice. For example, selecting **Users** will show all CarelinkPlus users, selecting **Department** will show each department. This is who the notification will be sent to. Then **Choose Notification Method** will set if the notification will be sent as an email, a CarelinkPlus reminder, or both.

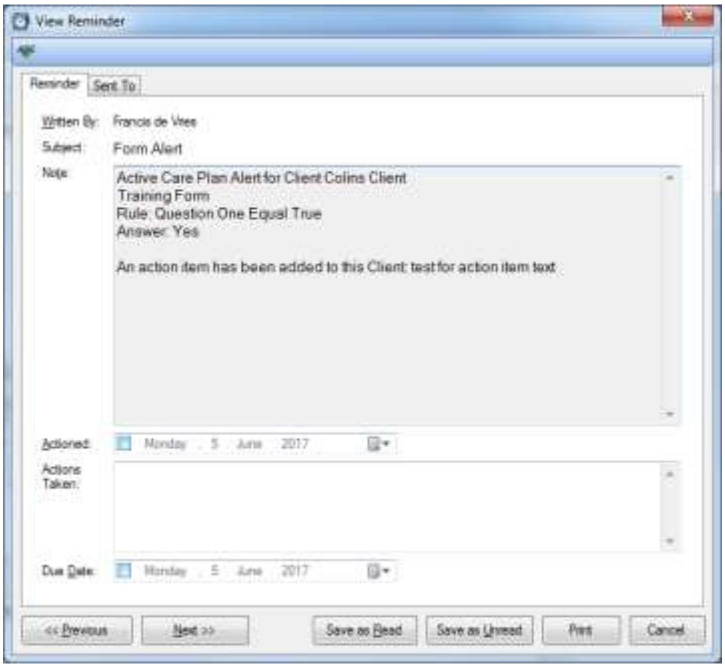
Create Action Item allows additional text to be added to the notification. This could be an instruction, or more context about the question and answer for the recipient.



Multiple Notification items can be created if required, select **Add** for each new item. Once all recipients have been added, select **Save** to finish.

Once the Workflow is triggered, the email and/or reminder will be created and sent. The subject will be **Form Alert**. The body will contain;

- The name of the Form
- The Rule that triggered the workflow
- The answer involved in the workflow
- The additional action item text if created.



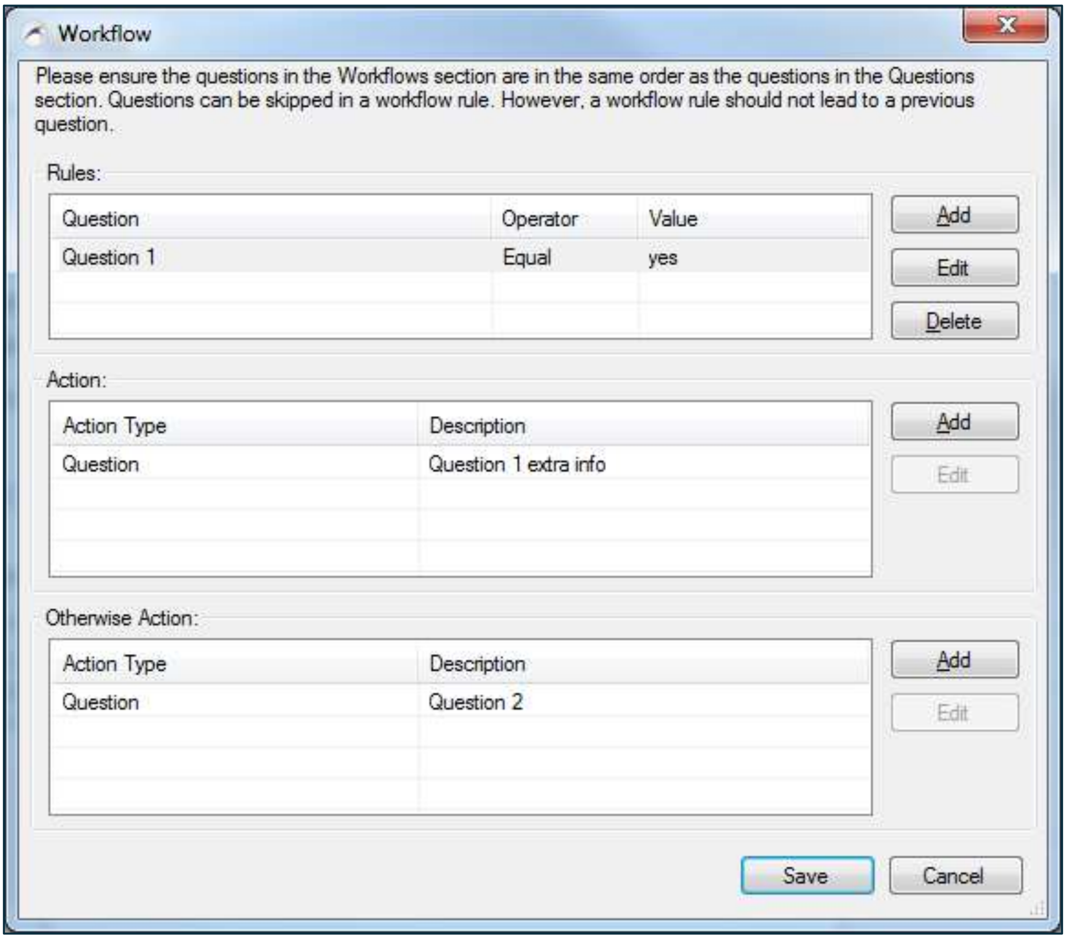
3.6.3 Otherwise Action

This allows you to set up actions that apply if the rules are not met. You can choose from the same action types as you can for the Action section above.

3.6.4 Workflow Examples

Example One

In the example below, the workflow is based on a yes/no question.



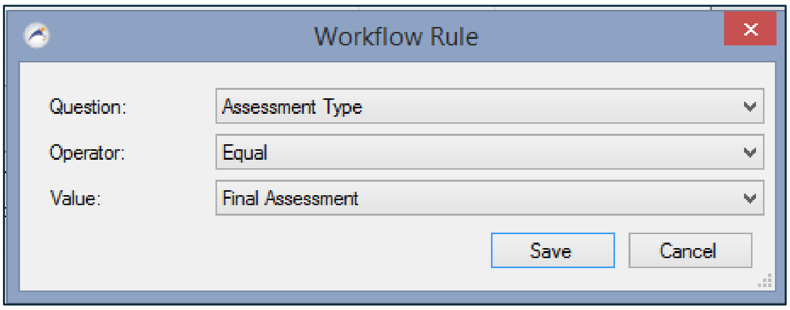
In the scenario above, we have a dropdown called ‘Question 1’ with the options ‘Yes’ and ‘No’, and a NoteBox question called ‘Question 1 extra info’ which will allow the user to write in additional information.

If the user entering the form selects ‘Yes’ for Question 1, the workflow will reveal the hidden question ‘Question 1 extra info’.

If the user selects ‘No’ for Question 2, they will be taken to Question 2 and the ‘Question 1 extra info’ NoteBox will remain hidden.

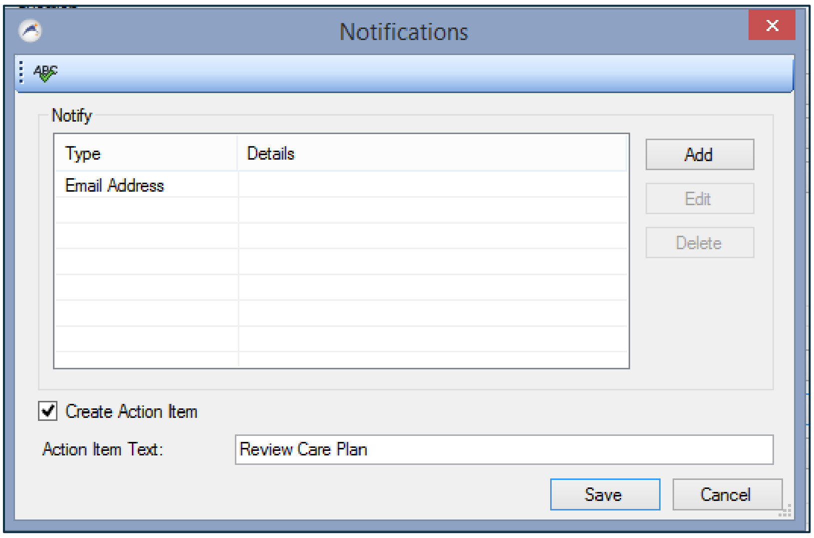
Example Two

In the below example, the workflow is based on the assessment type field. When a user selects the assessment type the workflow will commence.

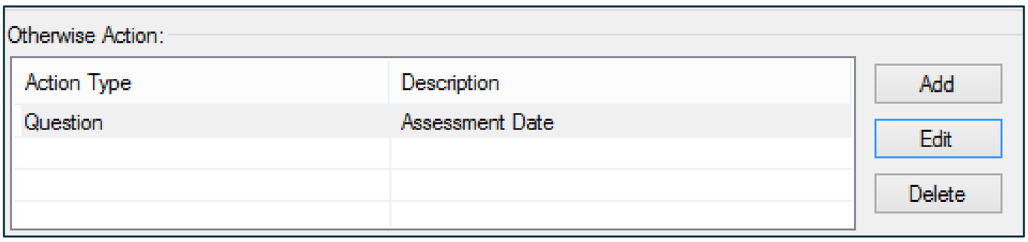


This will then trigger the action. If the value is equal to Final Assessment the action will be completed. Where the assessment is not equal to final assessment the workflow will move to other actions

When the rule is true the action of Emailing the escalation point that the Final Assessment has been completed and that a review is required will be completed.



Where the rule is not met the Otherwise action will take over and redirect the user to the next step. In this case, the otherwise action will take the user to the question ‘Assessment Date’.

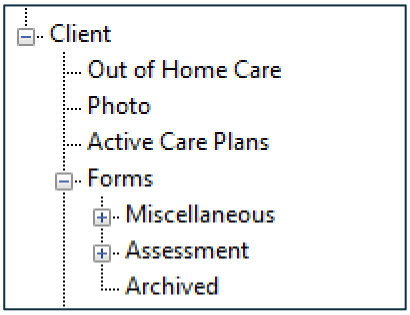


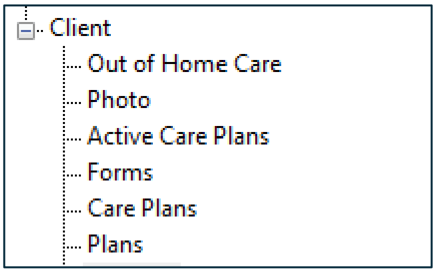
4 Adding forms

Once created, forms they will be accessible in CarelinkPlus in the following locations:

- Client > Person Node > Assessments Node.
- Client > Client Node > Forms Node.
- Enquiry > Forms Tab.
- Carer > Carer Node > Forms Node.

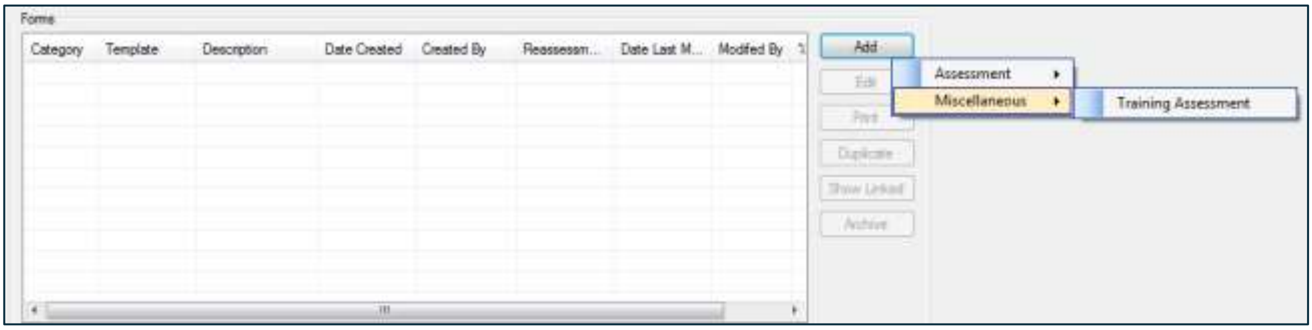
Depending on a Configuration selected (shown in Section 2.2), the node could display sub-nodes with the form category names.





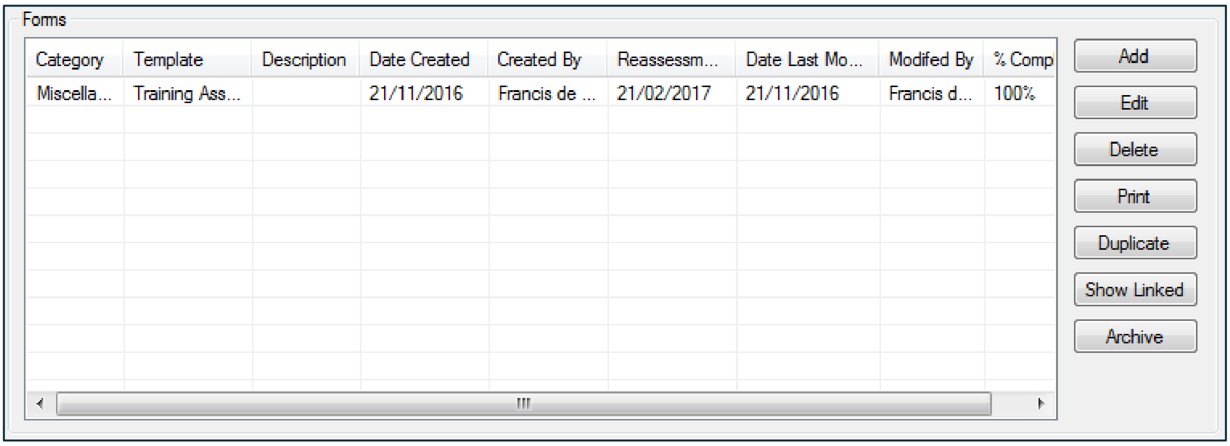
Note: Enquiries is an optional module that must be configured before it can be used with Forms

To add a form select the add button located next to the forms section, you will then be prompted to select the category, and then the form.



Once selected, a new window will open for the Form. Depending on the options selected in the forms template a number of options will be displayed for the user. *See **Section 5: Entering a Form***

Once added, The Forms Node will display all forms that have previously been recorded against the client file. In the view you will see the following information, Category, Template, Description, Date Created, Review Date, Date Last Modified and Percentage completed.



4.1 Form Controls

Add: When selected, users will be shown a list of From Categories they have access to, hovering the curser over one option will display the forms available within those categories.

Edit: Edit an existing form on a client record.

Delete: Removes the form from the client record.

Print: Select the form you wish to print, a print preview of the form will be displayed.

Custom print templates can be created with the Visual Studio. This feature is an additional configuration. For further information regarding this module please contact Carelink on (03) 5228 3800 or alternatively email CareSupport@Civica.com.au *or* customersolutions@Civica.com.au

Duplicate: Select the form you wish to duplicate; this will add a copy of the existing form to the client record.
Show Linked: There is an option when adding or editing a form for an individual, to Link related forms. This will show the forms linked to the current selection.

Archive: This option is used to lock and archive old forms, if you select this you will be prompted to confirm you wish to proceed archiving the form. The form will be removed from the forms section and listed in the archive list. *Please note: Once a form is archived it is permanent*.

Review: Selecting this will add the current date to the form under the column **Review Complete**

4.2 Columns

Category: The Form Category assigned to the Form template at creation.

Template: The Individual Form template's name.

Description: A brief description for the Form can be set when entering the form and viewed here.

Date Created: The user that selected Add to create this form (This will never change).

Created by: The date the user first added this form (this will never change).

Authorised Date: This only applies if you have the Authorised By stamp available for a form. Once that stamp is used, this date is set and displayed in this column. See Section 5.4: Stamping and locking for more information.

Review Date: This only applies if a number days has been specified in the Review Date field of the form definition. If this is the case once the last Stamp has been set on the approval tab of a form, this review date will be set that many days after the stamp was set. The review date is shown in this column where applicable.

Review Complete: ***This is entered when the form button Review is selected.***

Reassessment Date: The date the form needs to be reviewed and a new form created. A default time frame can be set with the Form template, or a date can be set when the form is created for the person.

Date Last Modified: If the form was edited, the date that this was last done.

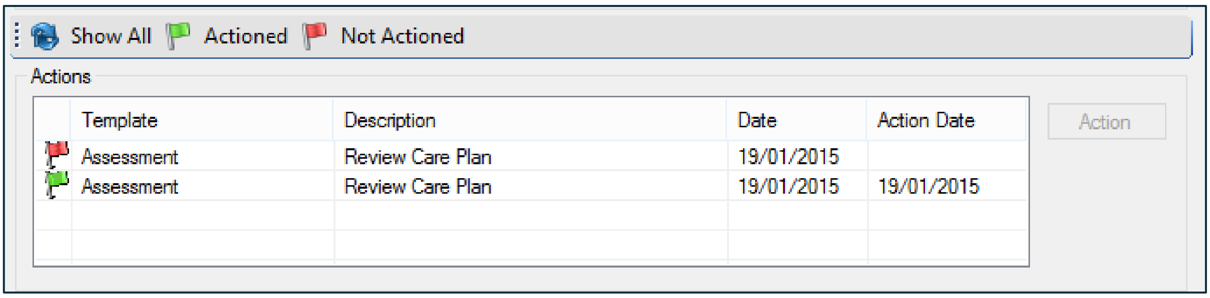
Modified by: If the form was edited, the last user to do so.

Percentage Completed: Percentage completed is dependent on key questions were designated as percentage completed, this is set up when the form template is created.

4.3 Other Windows

Actions:
This lists any actions (Notifications) that are to be completed on a client form. To view actions for each form select the form and the list of associated actions will be displayed. **Note** whether an action is displayed or not may depend upon whether you need to respond to specific questions and their associated workflow(s) within the selected form first. Once completed, actions can be selected and then marked as actioned. There are filters in the toolbar above this list, clicking on the icons in that tool bar to show all action items, or only those that have been actioned or not actioned.

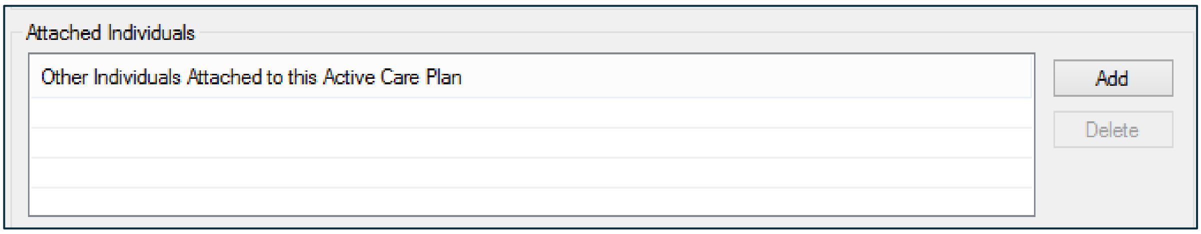
To complete an action select the item and the action button. You will be prompted to confirm you wish to complete the action and prompted for the date the action was completed.

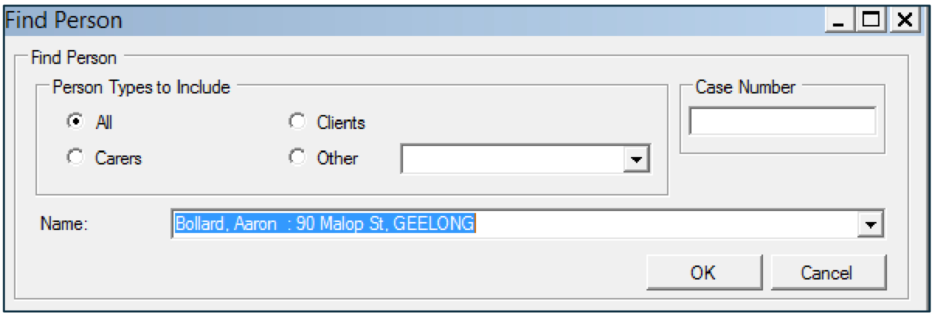


Attached Individuals:
This is used to attach a form to other individual's records, allowing the record to be accessed from their record as well. This might be used where the current individual is a child and you wish to attach their form(s) to their parent's or guardian's forms node as well.

Note: For the Add button to appear you need to first select from the Template Form (as part of System Maintenance, see earlier in this document) the options Allow Other Individuals Attached to Forms and Template is a Case Form.

To add individuals to a form, select the form and then select **Add** in the Attached Individuals section. You will then be prompted to search for the individual you wish to add.





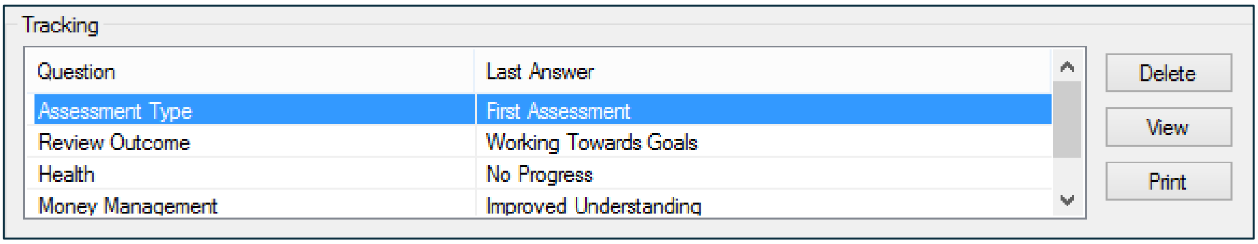
Note: Case Number is an optional configuration set by the system administrator. It allows a specific case number or value to be assigned to one or more persons who may be related, for example, members of the same family, and is set within a person record(s).

Tracking

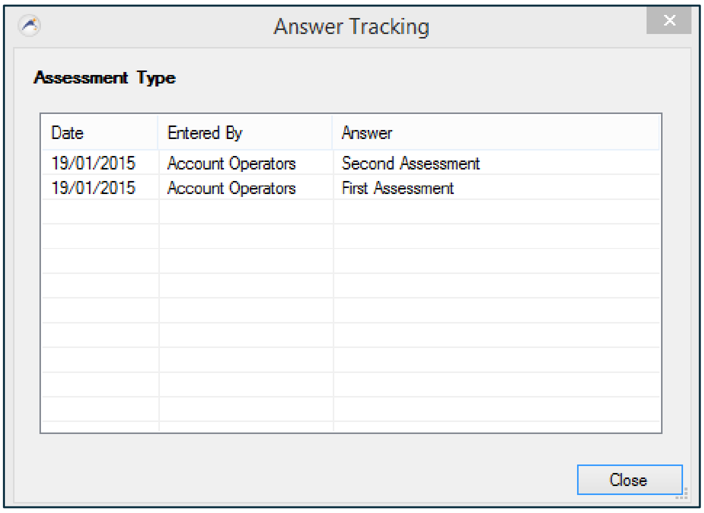
When filling in a form on a person's record, tracking can be enabled on one or more questions. Many but not all question types have the ability to track changes. In these instances if the **Track Changes** box is not checked then the user can manually activate track changes by clicking on the track changes button next to the relevant question on the form. Alternatively if the **Track Changes** box is checked when constructing the question then track changes is turned on by default, rather than relying on the user filling in the form to enable it

When tracking is enabled for a question, the question and the answer from the most recent copy of the form are added to this list to provide visibility without having to open or view the form. You are able to view, delete and print field tracking.

Note: Questions marked as Common Questions do not have tracking applied.

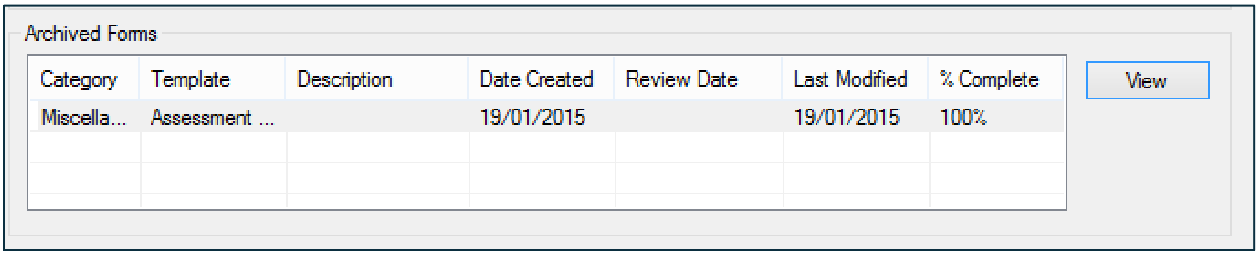


When selecting View a new window will open to allow the user to view the tracked changes:



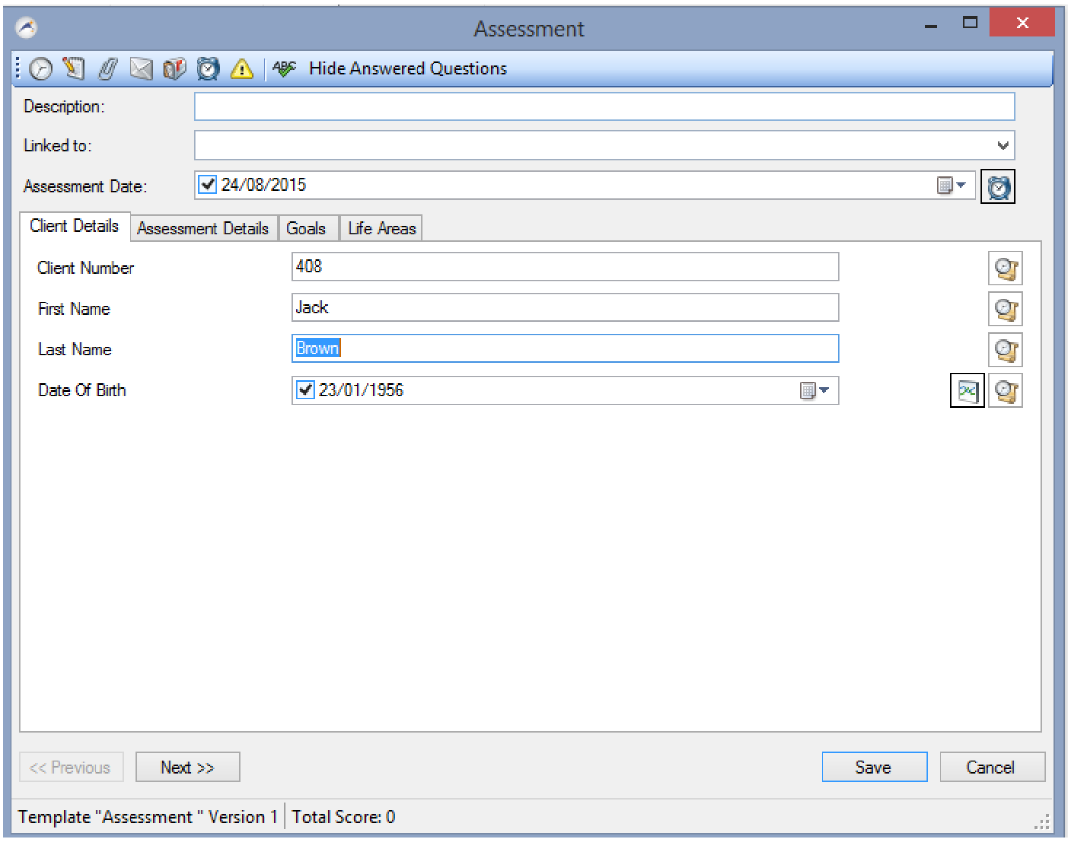
Archived Forms:

When a form is archived it is moved from the forms list and listed in the Archived Forms section. Archived forms can only be viewed. No changes can be made to the form once archived.



5 Entering a Form

Depending on the options selected in the forms template a number of options will be displayed for the user.



5.1 Forms Toolbar:

Within the forms toolbar you will have a number of options

In the above screenshot all of the toolbar options were made available on the forms template, a form can have any selection available.

Roster: This option allows you to create a roster shift record directly from the form. This is usually used to log time spent

Notes: This allows you to add a note that is then attached to the person's notes node. In this case a form is displayed that allows you to select the note type, date and some additional information. This note can then be viewed directly from the person's Notes node

Attached documents: This displays a form that allows you to attach one or more documents associated with this form or view those that have already been added. The document can then be viewed directly from the person's Attached Documents node

Email /SMS: This allows you to generate an Email or SMS message directly from the form. The SMS or Email can be directed to the client or carer and you also have the option of adding other individuals to be included. In order to send an SMS the individuals specified must have a valid mobile phone number. In order to send an email, they must have an email address (and set to accept emails).

Letters: This option can be used to create a letter directly from the form. The Letters feature allows you to choose from predefined letter templates that contain fields that are populated automatically (or you can manually create one). These form letters can then be added to the person's record as attached documents, or printed out to be sent to the person.

Reminders: This is used to add a reminder in relation to the form. A reminder can be an internal CarelinkPlus reminder which is only available to CarelinkPlus users, or it can be an Email reminder, in which case they will be sent via email when due and you have the option of specifying any email address.

Alerts: This allows the user to add an Alert directly from the form rather than having to go to the person's Alert node. An Alert is a pop up warning that is displayed when the client or carer record is accessed from various functions. *This option is not available for Enquiry forms.*

Also available are **Spellcheck** and **Hide Answered Questions**. This latter option allows you to hide all answered questions so a user can view only what is left to complete on the form when they return to it at a later time to complete it.

Note: For more information of the functionality of the toolbar shortcuts, please refer to our New User Guide.

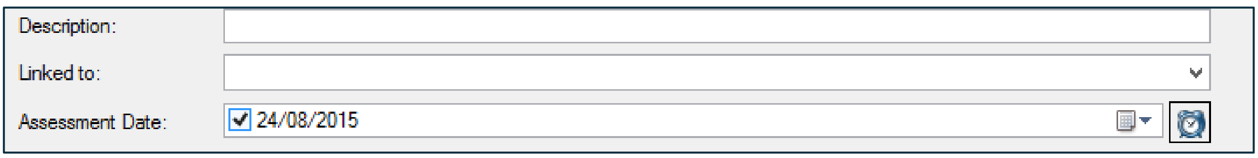
5.2 Forms Header:

The Form Header is accessible regardless of the section selected, and consists of three fields if all are enabled in the forms template.

Description: This is an optional field that allows users to enter their own form description. Select the ‘Show Description’ option on the Forms template (see earlier in this document) to enable this field.

Linked to: This will allow users to link the current form to a previous from, these can then be filtered for on the Form’s node. A form can be linked to any previous form, even if that are a different template from each other. *See Form Controls under **Section 4: Adding a Form**.*

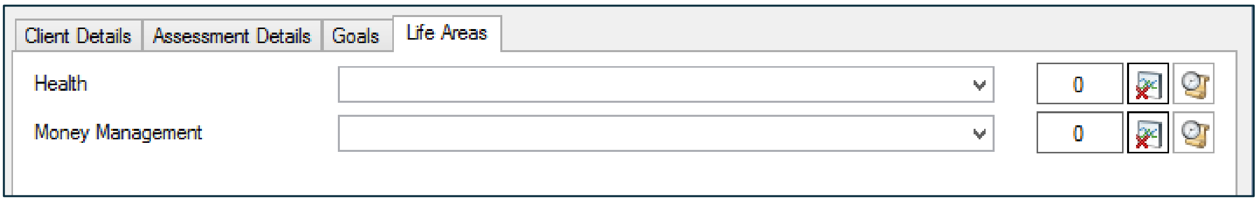
Assessment Date is an optional field and is only shown if the Re-Assessment Period is specified on the form template. This date is automatically added to the form template based on how it has been configured in system maintenance.



5.3 Sections

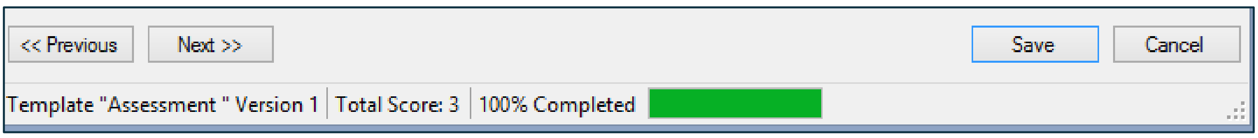
This area of the form is where users will complete the question outlined in the forms template. Each Section of the template is shown via a tab. Dependant on the forms template users may have access to the following functions:

Function	Description
Track Changes	When tracking is enabled for a question, the question and the answer from the most recent copy of the form are added to this list to provide visibility without having to open the form(s).
View History	This is used where the same form has been added multiple times for the same individual. I.e. a periodic check-up or review for example. You can press this button next to a question to see the answer given for this question across all copies of the same form for this individual.
Percentage Indicator	When a form is defined, the creator of the form can specify that certain questions will count towards setting the percentage complete for a form. If there are no such questions defined, the percentage complete will always be shown as 100%.
View Audit Log	Clicking on this button shows the audit log of changes made to this field on this specific form. When you click on this button a pop up form is displayed that will show the date the change was made, the name of the operator that made the change, their position (from their user record) and what the answer was changed to at that time. This is updated when the form is saved, so making multiple changes to an answer without saving would not normally be recorded. Where the answer type is an Image Upload, Signature, or Image Default (where you can draw over an image), a history is stored of each image. When viewing the history on these answer types, it will show the images or changes that were made along with the operator's details and the date.



Footer:

The form footer contains the **Previous and Next** buttons. These allow you to navigate through the different tabs of the form, **Save** allows you to save changes to the form and **Cancel** will cancel any changes made and close the form. The **status bar** at the bottom of the form shows the name of the template and the version number, the total score (the total value across all calculated fields) and the percentage complete.

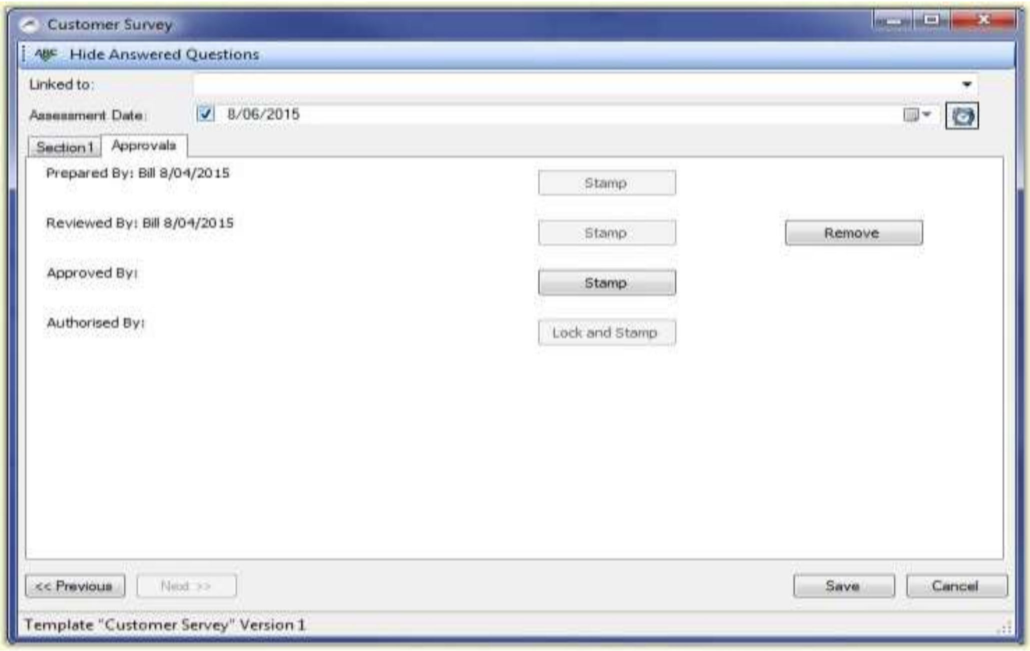


Users can then navigate through the sections and enter the fields accordingly..

Note: Some fields, such as Client names or phone numbers, will update if they are changed from the Form. This is a good opportunity for users to keep records up to date without too much extra effort. These fields will continue to be updated after the form is locked for editing.

5.3.1 Lock and Stamping

When adding a new form based on the existing Forms template an **optional** tab will appear called **Approvals.** This only applies if you have activated the **Lock and Stamping** feature.



Stamp: For each approval stage available for this form there will be a stamp button. Only the next button in the flow from top to bottom will be available.

When you press the Stamp button, your user name will be displayed and you will be prompted to enter your password. This is the same password you use when you log into carelink plus. On entering your password and pressing OK, your user name and the current date will be recorded for that particular stamp. Prior to entering your password, you can press the cancel button if you do not want to continue with the stamp operation.

Once stamped, that stamp button is no longer available and if there is another further down the page that will be enabled.

Lock and Stamp: This is the same as stamp except than once stamped the form is locked and can no longer be edited. Only the last approval stamp on this form can have the Lock and Stamp option. The settings in the Stamp and Lock section on the form definition determine whether the final stamp for a form will lock that form. There are user group permissions that control access to the Lock and Stamp button. See Configuration Options below.

Remove: This button is only available for the last approval that has been selected. It is used to remove that approval. Only those users with the relevant user group permissions will have this option. Refer to configuration options below.

CIVICA

6 Additional information

6.1 Database fields

Client Fields	Location on the client record
Allergies	Person Node > Allergies node > Allergy field
Alt Phone	Person Node > Contact details node > Where the contact type is Alt Phone
Care Plan Date	Client Node > Care Plan field
Case Manager	Client Node > Case Manager dropdown
Category	Person Node > Category dropdown
Client Available Search Information	Client node > Client Available Search Information field
Client CALD	Client node > CALD field
Client Coordinator	Client Node > Coordinator dropdown
Client Number	Client Node > Client Number field
Client Preferred Name	Person Node > Preferred Name field
Client Referrals	
Communication Book	Client Node > Communication Book tickbox (*Also Emergency Summary*)
Communication Book Location	Client Node > Communication Book location field (*Also Emergency Summary*)
Communication Methods	Client Node > Communication methods field (*Also Emergency Summary*)
Country of Birth	Person Node > Country of Birth field
Court Orders & Restrictions List	Person Node > Court Orders & Restrictions List sub-node
CSTDA Cessation Reason	Client Node > Cessation reason
Culture	Person Node > Culture dropdown
CustomPersonID	
Date of Birth	Person Node > Date of Birth date field
Date Service Commenced	Client Node > Date Service Commenced date field
Date Service Concluded	Client Node > Date Service Concluded date field
Decision Maker	Client Node > Decision Maker field
Default Address LGA	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Region	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Suburb	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Type	Person Node > Contact Addresses node > record with **default view** ticked
Default Street Address	Person Node > Contact Addresses node > record with **default view** ticked
Departments	Person Node > Departments node
Disabilities	Person Node > Disabilities node
Emails	Person Node > Contact details node > Where the contact type is Email
Emergency Hospital Procedures	Person Node > Emergency Summary node > Emergency Hospital Procedures field

Emergency Procedures	
Emergency Summary	Person Node > Emergency Summary node
Emergency Summary Description	Person Node > Emergency Summary node > Description field
Emergency Summary GP Notes	Person Node > Emergency Summary node > Preferred GP Comments field
Emergency Summary Second Contact notes	Person Node > Emergency Summary node > Second Emergency Contact Comments field
Emergency Summary / Ambulance Consent /Consent to call an ambulance in an emergency	Person Node > Emergency Summary node > Consent to call an ambulance in an emergency tickbox
Emergency Summary / Ambulance Consent /Date of Consent	Person Node > Emergency Summary node > Date of Consent date field
Emergency Summary / Ambulance Consent /Or substitute decision maker name	Person Node > Emergency Summary node > Or substitute decision maker name dropdown
Emergency Summary / Ambulance Consent /Provided by Client	Person Node > Emergency Summary node > Provided by Client tickbox
Fax	Person Node > Contact details node > Where the contact type is Fax
First Aid Kit	Client Node > First Aid Kit tickbox (*Also Emergency Summary*)
First Aid Kit location	Client Node > First Aid Kit location field (*Also Emergency Summary*)
First Emergency Contact Comments	Person Node > Emergency Summary node > First Emergency Contact Comments field
First Emergency Contact First Name	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked
First Emergency Contact Last Name	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked
First Emergency Contact Relationship	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked > Primary Relationship dropdown
First Emergency Contact Title	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked
First Name	Person Node > First Name field
Funding Detail list	Client Node > Funding Details node > all records
Gender	Person Node > Gender dropdown
Home phone	Person Node > Contact details node > Where the contact type is Home Phone
Income level	Client Node > Funding Details node > Income level tickbox
Indigenous status	Person Node > Indigenous status dropdown
INI / Health and Chronic Conditions	Person Node > Initial Needs Identification Node > Health and Chronic Conditions tab
INI / Palliative Care	Person Node > Initial Needs Identification Node > Palliative Care tabs
INI / Referral Information	Person Node > Initial Needs Identification Node > Referral Information tabs
INI / Social and Emotional Wellbeing	Person Node > Initial Needs Identification Node > Social and Emotional Wellbeing tabs

Languages	Person Node > Languages node > all languages added
Last Name	Person Node > Last Name field
Main Languages	Person Node > Languages node > language with **Main Language** ticked
Marital Status	Person Node > Marital status
MDS Cessation Reason	Client Node > Cessation Reason dropdown
Medical Condition	Person Node > Medical Conditions node > each item is shown
Medicare Expiry	Client Node > Medicare Expiry field
Medicare Individual Reference Number	Client Node > Medicare Individual Reference Number field
Medicare Number	Client Node > Medicare Number field
Medication	Client Node > Medication node > all items
Medication list	Client Node > Medical Condition > [Condition] > Medications
Medication Location	Client Node > Medication Location field
Mobile Phone	Person Node > Contact details node > Where the contact type is Mobile
Organisation List	
Personal Alarm	Client node > Personal Alarm tick box
Preferred GP First Name	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Last Name	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Region	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Street Address	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Suburb	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Title	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred Hospital	Client Node > Preferred Hospital dropdown
Religion	Person Node > Religion dropdown
Risk Assessment Date	Client Node > Risk Assessment Date date field
Safety Audit Date	Client Node > Safety Audit Date date field
Secondary Preferred Hospital	Person Node > Emergency Summary node > Secondary Preferred Hospital dropdown
Special Needs Group	Client Node > Special Needs Group node > all items
Title	Person Node > Title dropdown
Unique Health Identifier	Client Node > Unique Health Identifier field
User Defined Checkbox	Client Node > **Field is named from Global Configuration**
User Defined Date	Client Node > **Field is named from Global Configuration**
User Defined Dropbox	Client Node > **Field is named from Global Configuration**
User Defined Field	Client Node > **Field is named from Global Configuration**
Workphone	Person Node > Contact details node > Where the contact type is Email

Employee Fields	Location on the employee record
Allergies	Person Node > Allergies node > Allergy field
Alt Phone	Person Node > Contact details node > Where the contact type is Alt Phone
Average Hours	Employee Node > Average Hours per Day field
Carer State Police Check	Employee Node > State Police Check date field
Carer State Police Check Reference	
Category	Person Node > Category dropdown
Commencement Date	Person Node > Commencement Date date field
Contact Review	Employee Node > Contact Review date field
Coordinator	Employee Node > Coordinator dropdown field
Country of Birth	Person Node > Country of Birth field
Court Orders & Restrictions List	Person Node > Court Orders & Restrictions List sub-node
Culture	Person Node > Culture
CustomPersonId	
Date of Birth	Person Node > Date of Birth date field
Default Address Region	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Suburb	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Type	Person Node > Contact Addresses node > record with **default view** ticked
Default Address Type	Person Node > Contact Addresses node > record with **default view** ticked
Default Street Address	Person Node > Contact Addresses node > record with **default view** ticked
Department List with Case Numbers	
Departments	Person Node > Departments node
Disabilities	Person Node > Disabilities node
DVA Nursing Type	Employee Node > DVA Nursing Type dropdown field
Email	Person Node > Contact details node > Where the contact type is Email
Employee Availability Search Information	Employee Node > Employee Availability Search Information field
Employee Classification	Employee Node > Employee Classification dropdown
Employee Search	
Employment Basis	Employee Node > Employment Basis dropdown field
Exclude From Availability Search	Employee Node > Exclude From Availability Search tick box
EziPay Pin	Employee Node > Ezipay PIN field
Fax	Person Node > Contact details node > Where the contact type is Fax
First Aid Date	Employee Node > First Aid date field
First Aid Expiry Date	Employee Node > First Aid Expiry date field
First Aid Ref	Employee Node >
First Emergency Contact First Name	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked

First Emergency Contact Last Name	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked
First Emergency Contact Relationship	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked > Primary Relationship dropdown
First Emergency Contact Title	Person Node > Who to Contact Node > person with **First Emergency Contact** ticked
First Name	Person Node > First Name field
Gender	Person Node > Gender dropdown
Home Phone	Person Node > Contact details node>Where the contact type is Home Phone
Indigenous Status	Person Node > Indigenous status dropdown
Language	Person Node > Languages node > all languages added
Last Name	Person Node > Last Name field
Main Language	Person Node > Languages node > language with **Main Language** ticked
Manager	Police Check > Manager dropdown
Marital Status	Person Node > Marital status
Maximum Hours	Employee Node > Max Hours per fortnight field
Medical Check	Employee Node > Medical Check
Medical Condition	Person Node > Medical Condition Node > all items
Mobile Phone	Person Node > Contact details node > Where the contact type is Mobile
Organisation List	
Other Review	
Payband	Employee Node > Payband dropdown
Payroll Code	
Performance Review Date	Employee Node >
Police Check	Employee Node > Police Check date field
Police check Issue Date	Employee Node > Police check Issue Date date field
Police Check Ref	
Preferred GP First Name	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Last Name	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Region	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Street Address	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Suburb	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Preferred GP Title	Person Node > Who to Contact Node > person with **Preferred GP** ticked
Probationary Review Date	Employee Node > Probationary Review date field
Religion	Person Node > Religion dropdown
Requested Hours	Employee Node > Requested Hours
Skill	Employee Node > Skill Node > all items
Statutory Declaration Date	Employee Node > Statutory Declaration date field
Statutory Declaration Ref	
Termination Date	Employee Node > Termination Date date field
Termination Reason	Employee Node > Termination Reason dropdown field

Title	Person Node > Title dropdown
Training	Employee Node > Training node > all items
Unique Health Identifier	
User Defined Checkbox	Employee Node > **Field is named from Global Configuration**
User Defined Date	Employee Node > **Field is named from Global Configuration**
User Defined Dropbox	Employee Node > **Field is named from Global Configuration**
User Date Field	Employee Node > **Field is named from Global Configuration**
Work Phone	Person Node >Contact details node >Where the contact type is Work Phone
Working with Children Expiry Date	Employee Node > Working with Children Expiry Date date field
Working with Children Ref	Employee Node > Working with Children date field

Note: Enquiry Forms do not have access to database fields.

6.2 Formula Syntax

Syntax relates to the structure of the language used for the formulas.
The formulas must be in the correct format in order to be interpreted by the forms module. In its most simple form you have a Function followed by brackets that may or may not contain an Argument for evaluation within those brackets.

For example: count(), count(answer="Yes"), sum(), sum(score>0), etc.
These functions can then be joined by the operators + (plus), - (minus), \ (divide), * (multiply) and % (modulus) to allow you to create more complex calculations such as: count (answer = "High") + (.5 * count (answer = "low")).

Functions can also be compounded to a limited extent allowing you to create a more complex formula such as count(score > avg(score >= 0)).

The arguments that you can specify within a function can be based on scores or answers. This is specified in the function by using the keyword **Score** or **Answer**.

Score is used where you want to evaluate the scores from the fields that generate scores rather than the actual answer text.

The field types supported for score comparators are the scores from the: Drop-Down List with Scoring, Numeric Drop-Down and Number Field.

The scores from these fields are purely numeric and can be used in various calculations.
An example would be count(score=1), count(score >5), or max(score >0), etc.

Answer is used where you want to perform a calculation based on the answer text that is given to a question. The field types that you can use the Answer comparators are: Drop-Down Lists, Numeric Drop-Downs, and Numeric fields. (Radio Buttons can also be used by some functions).

An example would be: count(answer="Yes"): This will count the number of answers from the supported field types that have an answer set to "Yes".

The answer value must always be specified inside quotation marks and it is not case sensitive, so the answer "YES", "Yes" and "yes" would all be counted in this example.

Arithmetic Functions

Arithmetic functions are used for various calculations. These functions only us numeric constants or Scores They either use specific numbers or the results of other functions

Statistical Functions

Statistical functions work on a set of numbers provided by Form answers. The expression for the function is optional however specifying an expression often affects which question types get included.

All of the functions can work with the Scores from answers based on DropDownListWithScores, NumericDropDownList and optionally values from NumberFields. The count function can work with these as well as DropDownList and RadioButtons depending on the expression.
Note: This applies when you set your Question Type to FormulaField.

Function	**Applicable to**	**Example**	**Comments**
Count (expression)	Scores & Answers from: -DropDownList -DropDownListWithScores -NumberField -NumericDropDownList -RadioButtons (answer only)	Count() Count(score>0) Count(Answer>"0") Count(Answer="High")	Total number of applicable questions in section (regardless of answer) Total number of DropDownListWithScores or NumericDropDownList only where **score** is >0 Total where **Answer** is > "0" from DropDownListWithScores, DropDownList, NumericDropDownList and NumberFields if they meet the criteria) (For Radiobuttons only works with =) Count of all applicable questions where Answer is = "High" from DropDownListWithScores, DropDownList, RadioButtons (Excludes values from NumberFields)
Sum (expression)	Scores & Answers from: -DropDownListWithScores -NumericDropDownList -NumberField * *depending on expression	sum()	Sum of all **Scores** from applicable questions (DropDownListWithScores and NumericDropDownList) as well as **values** of NumberFields
		sum(score>=0)	Sum of all **Scores** from applicable questions where score is >= 0 (only uses scores so does not include **values** from NumberFields)
		sum(Answer>"0")	Sum of all **Scores** from applicable questions where Answer is >= "0" (includes values from NumberFields if they meet the criteria)
		sum(Answer="High")	Sum of all **Scores** from applicable questions where Answer is = "High" (Excludes values from NumberFields)
Avg (expression)	Scores & Answers from: -DropDownListWithScores		Average is the Total Value / number of applicable questions

	-NumericDropDownList -NumberField * *depending on expression	avg()	As no criteria was specified **Total Value = Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields
		avg(score>0)	Average only **Scores** from DropDownListWithScores or NumericDropDownList only where score is >0
		avg(Answer>"0")	Average **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields that meet criteria
		avg(Answer="High")	Average only **Scores** from DropDownListWithScores or NumericDropDownList only where answer is equal to "High"
Mode (expression)	Scores & Answers from: -DropDownListWithScores -NumericDropDownList -NumberField * *depending on expression	mode()	Mode is the most common number for a sequence. i.e. mode(1,2,3,2,4,5) = 2 as it appears more than any other value. If there are multi modes or none it will return the first value from the set. As no criteria was specified Mode is based on **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields
		mode(score>0)	mode only **Scores** from DropDownListWithScores or NumericDropDownList only where score is >0
		mode(Answer>"0")	mode **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields that meet criteria
		mode(Answer="High")	mode only **Scores** from DropDownListWithScores or NumericDropDownList only where answer is equal to "High"
Median (expression)	Scores & Answers from: -DropDownListWithScores -NumericDropDownList -NumberField * *depending on expression	mode()	Median returns the middle data from a sorted set. If the number of data points is odd return the middle value (medium(1,2,**3**,4,5) = 3. If the number of datapoints is even return average of middle two values: medium(1,**2,3**,4) = 2.5. As no criteria was specified Median is based on **Scores** from

			DropDownListWithScores or NumericDropDownList and **Values** of NumberFields
		mode(score>0)	Median only **Scores** from DropDownListWithScores or NumericDropDownList only where score is >0
		mode(Answer>"0")	Median **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields that meet criteria
		mode(Answer="High")	Median only **Scores** from DropDownListWithScores or NumericDropDownList only where answer is equal to "High"
Var (expression)	Scores & Answers from: -DropDownListWithScores -NumericDropDownList -NumberField * *depending on expression		variance measures how far a set of numbers is spread out. A variance of zero indicates that all the values are identical. Variance is always non-negative: a small variance indicates that the data points tend to be very close to the mean (expected value) and hence to each other, while a high variance indicates that the data points are very spread out around the mean and from each other.
		var()	As no criteria was specified var is based on **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields
		var(score>0)	var only **Scores** from DropDownListWithScores or NumericDropDownList only where score is >0
		var(Answer>"0")	var **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields that meet criteria
		var(Answer="High")	var only **Scores** from DropDownListWithScores or NumericDropDownList only where answer is equal to "High"
Stdev (expression)	Scores & Answers from: -DropDownListWithScores -NumericDropDownList -NumberField * *depending on expression		stdev is a measure that is used to quantify the amount of variation or dispersion of a set of data values.[1] A standard deviation close to 0 indicates that the data points tend to be very close to the mean (also called the expected value) of the set,

			while a high standard deviation indicates that the data points are spread out over a wider range of values
		stdev()	As no criteria was specified stdev is based on **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields
		stdev(score>0)	stdev only **Scores** from DropDownListWithScores or NumericDropDownList only where score is >0
		stdev(Answer>"0")	stdev **Scores** from DropDownListWithScores or NumericDropDownList and **Values** of NumberFields that meet criteria
		stdev(Answer="High")	stdev only **Scores** from DropDownListWithScores or NumericDropDownList only where answer is equal to "High"
Min (expression)	Scores & Answers from: -DropDownList -DropDownListWithScores -NumberField -NumericDropDownList -RadioButtons (answer only)	min()	Min of all **Scores** from applicable questions (DropDownListWithScores and NumericDropDownList) as well as **values** of NumberFields
		min(score>=0)	Min of all **Scores** from applicable questions where score is >= 0 (only uses scores so does not include **values** from NumberFields)
		min(Answer>"0")	Min of all **Scores** from applicable questions where Answer is >= "0" (includes values from NumberFields if they meet the criteria)
		min(Answer="High")	Min of all **Scores** from applicable questions where Answer is = "High" (Excludes values from NumberFields)
Max (expression)	Scores & Answers from: -DropDownList -DropDownListWithScores -NumberField -NumericDropDownList -RadioButtons (answer only)	Max()	Max of all **Scores** from applicable questions (DropDownListWithScores and NumericDropDownList) as well as **values** of NumberFields
		Max(score>=0)	MinMax of all **Scores** from applicable questions where score is >= 0 (only uses scores so does not include **values** from NumberFields)
		Max(Answer>"0")	Max of all **Scores** from applicable questions where Answer is >= "0" (includes values from NumberFields if they meet the criteria)

		Max(Answer="High")	Max of all **Scores** from applicable questions where Answer is = "High" (Excludes values from NumberFields)

Note: This applies when you set your Question Type to FormulaField.

Function	Applicable to	Example	Comments
Root (value, y)	Numeric Values	Root(8,3)	Returns y root of value : 2 in this case
	Function Value	Root(sum(Score>0),2)	Return root 2 of sum scores where scores are higher than 0
Power (value, y)	Numeric Values	pow(3,2)	Returns a constant (3 to the power of 2) =9
	Function Value	pow(sum(Score>0),2)	Raises sum of all scores above 0 to the power of 2
Sqrt (value)	Numeric Values	Sqrt(9)	Returns square root of number
	Function Value	sqrt(sum(Score>0))	Returns square root of sum of scores greater than 0.
%	numeric		This is not a functions as such. It is an operator that returns the Modulus (remainder of the Euclidean division). This is different to a normal division. With normal division if you divide 9 by 2 you get 4.5. With Euclidean division you would actually get 1 (2 goes into 9 4 times evenly and there is a value of 1 remaining, so 1 is returned). It is similar to long division in that you determine how many times the smaller number (divisor) can fit into the larger number without fictionalising it. Whatever is left over is returned as the modulus. For example: **9 % 2** will return **1** (2 goes into 9 4 times with **1** remaining) **17 % 3** will return **2** (3 goes into 17, 5 times with **2** remaining) **10 % 6.5** will be **3.5** (6.5 goes into 10 once with **3.5** remaining)

8 Document Control

Revision History

Revision Date	Version	Author	Description
24/05/2015	v4.8	Sheridan Ots	Document Creation - Draft
31/7/2015	v4.8	P. Voumard	Updated changes.
25/11/2016	V4.12	F de Vries	Formatting changes Update from 4.8 to 4.12
05/06/2017	V 17.3	F. de Vries	Update from 4.12 to 17.3
12/06/2019	V 19.1	F de Vries	Functionality updates for latest version
29/07/2021	V 21.0	Chris Ridley	Update branding

Copyright Notice:

Civica Care
East 2, 33 Mackey Street
North Geelong VIC 3215

Tel: +61 3 5228 3800

www.civica.com

@CivicaPty

Linkedin.com/company/civica-pty-limited