Create a New Form

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> **Path: Main Menu > Admin Tools Menu > Form Builder**

About

You can create Forms within NextStep to replace paper forms that you use in your Agency. Below are steps on how to add a new Form, add Fields to a Form, and associate Programs and Locations with a Form.

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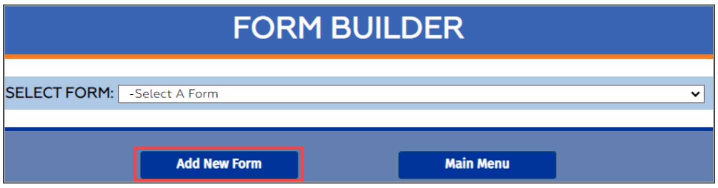
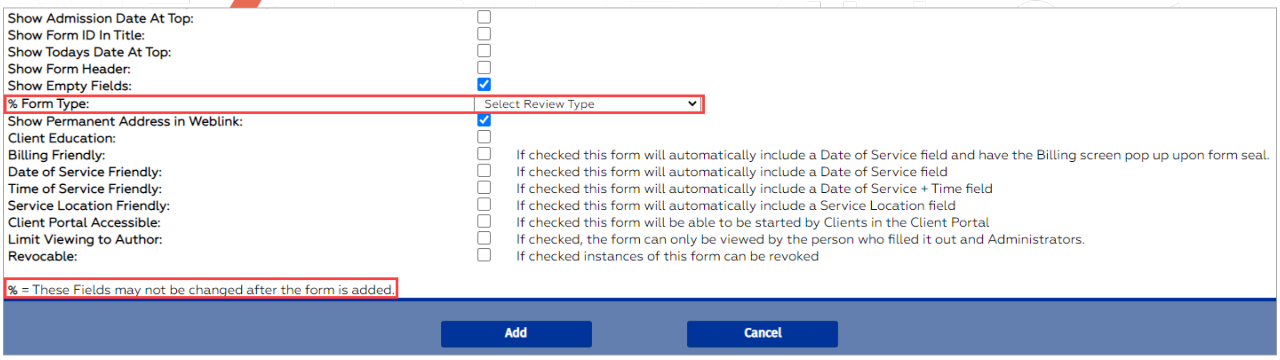
Add a New Form

1. Navigate to the Form Builder by following the path above.
2. Click the **Add New Form** button. The User Defined Forms page opens.



3. In the **Form Name** field, enter the name of the Form you're adding.
4. In the **Form Alias** field, enter an alias for the Form.
5. Select the **checkboxes** for options that start with "Show…" to include specific information in the Form. Options located toward the bottom of the page can also be selected to add additional details to the Form. Refer to the on-screen descriptions for details on what each checkbox adds to the Form.
6. Click the **% Form Type** drop-down and select a Form Type from the list below. This cannot be changed after the Form is added.

- **Scheduled Forms:** These Forms have a due date that resets every time the Form is filled out. Often, Scheduled Forms are sister Forms of Assessment Forms. For example, a Consent for Treatment might be due at admission (Assessment Form) and then completed annually (Scheduled Form). Other examples include PHQ-9, GAD-7, etc.
- **Unscheduled Forms:** These Forms can be filled out for a client at any time. Unscheduled Forms do not have a due date, are not required, and can be filled out as often as needed.
- **Discharge Forms**: These Forms are completed at discharge. Once signed/sealed, the client is discharged and no further work can be done on that client.
- **Transfer Forms**: These Forms are the Forms of record for client Program transfers. Editing a Program on the Face Sheet automatically creates a Transfer Form which is stored in the Document Center.
- **Assessment Forms**: These are required, one-time Forms and have a due date.
- **Pre-Admit Forms/Intake Forms**: These Forms are completed prior to a client's Program admission; once admitted, Pre-Admit Forms cannot be completed for a given client.
- **Follow-Up Forms (After Discharge)**: These Forms are used once a client is discharged and no more work can be done on that client.



7. Click the **Add** button.

Form Categories

After you create a form, you can edit the form an assign it a category. Categories may be created using **Admin Tools > Form Category Setup.**

	Note: If categories are not enabled for your site, contact support to turn them on. You can then give an admin access to them in **Maintain Users**. To enable that menu item, after Categories have been enabled • Open **Admin Tools -> System Setup (Supplemental)** • Click **Main Menu Setup** • In the search box under **Page Title** enter *Category* • Click **Show Maintain Users** on for **Form Category Setup**

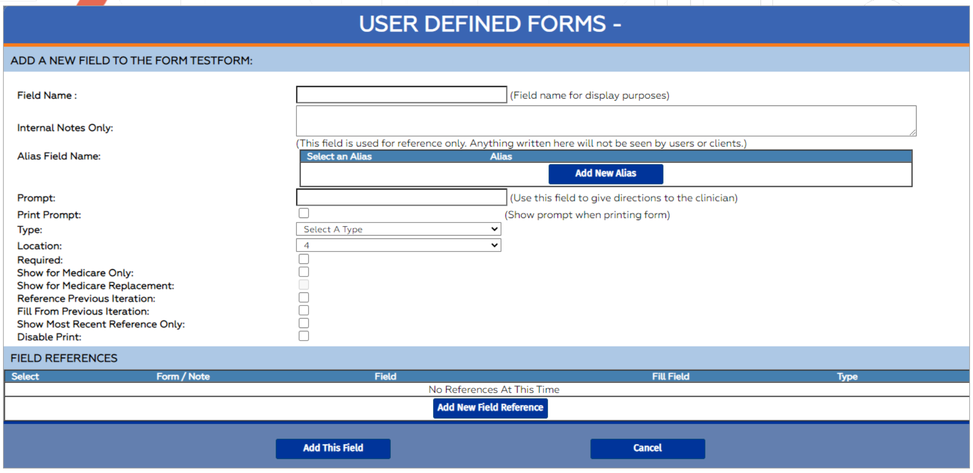
Any Forms that are not assigned to a category will be placed in a category labeled **MISC**. If all form in a section, like **Unscheduled**, are assigned to a category, the **MISC** category will no longer appear.

Add Fields to a Form

After adding your Form to the system, you will need to add Fields to the Form.

1. In the Form Builder, use the **Select Form** drop-down and select a Form.

2. At the bottom of the page, click the **Add New Field** button. The User Defined Forms page is displayed.



3. In the **Field Name** field, enter a name for the field. This is what the user or client sees on the Form.
4. *(Optional)* In the **Internal Notes Only** box, enter internal notes about the field. This information is not displayed for users or clients.
5. *(Optional)* Click the **Add New Alias** button, enter an alias, and then click the **Add This Alias** button to create and apply an alias for the field. This Alias Field Name **should not** contain spaces or special characters.

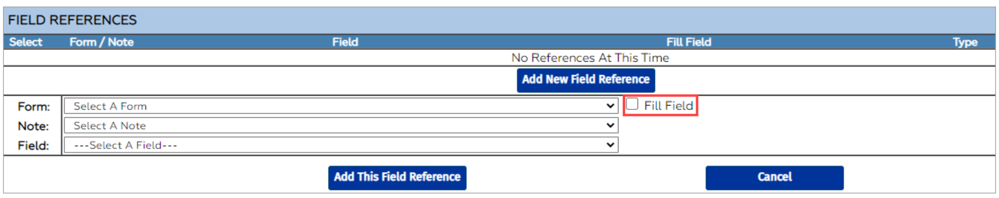
> **Note**: The Alias is a unique identifying name for the field. For example, if there were multiple fields in the Form called "Comments", you would want to add an alias to differentiate them from one another based on what they should be used for, such as CommentsHealth, CommentsPsychoSocial, etc.

6. *(Optional)* In the **Prompt** field, enter the text that will be displayed in italics next to the field/question to give directions to the user/client.
7. *(Optional)* Select the **Print Prompt** checkbox if you'd like for the field prompt to be displayed when printing the Form.
8. Click the **Type** drop-down and select the type of field you'd like to add, such as text, drop-down, date, etc.

> **Note**: Selecting a Field Type may change the options that are displayed on this page below the Type drop-down.

9. Click the **Location** drop-down and select the order in which you want the field to be displayed on the Form.
10. *(Optional)* Select the **Required** checkbox to make this field required. Marking a field as required means that you will **not** be able to seal the Form until the field is completed.
11. *(Optional)* Select the **Disable Print** checkbox if you don't want this field displayed when this Form is printed.
12. Complete any other fields as necessary depending on the type of field you've selected to add to the Form.
13. *(Optional)* Add a Field Reference, if you want this field to pull a data point from one Form to another. There are two types of Field References, above-box referencing and autofill referencing:

- **Above-box Referencing:** The data is displayed as blue text above the entry box for the question/field you are viewing. This is useful if you want to know what has been entered as data before but don't want it displayed in the field itself.
    a. Click the **Form** or **Note** and **Field** drop-downs and select the Form or Note and Field you want to reference.
    b. Click the **Add this Field** Reference button.
- **Autofill Referencing:** The data is displayed directly in the field.
    a. Click the **Form** or **Note** or **Field** drop-downs and select the Form or Note and Field you want to reference.
    b. Select the **Fill Field** checkbox.



c. Click the **Add This Field Reference** button.

> **Note**: Selecting a Field Type may change the options that are displayed on this page below the Type drop-down.

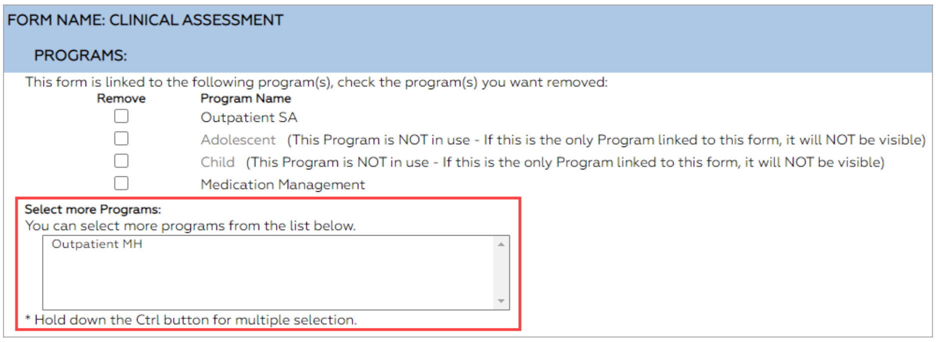
14. Click the **Add This Field** button.

Attach Programs and Locations to a Form

Forms are only visible to a Clinician if the client they are treating is in both the Program and Location of a given Form.

1. Navigate to the Form Builder: **Main Menu > Admin Tools Menu > Form Builder**
2. Click the **Select a Form** drop-down and select a Form.
3. At the bottom of the page, click the **Edit This Form** button.
4. Attach the Form to a Program (with the exception of Pre-Admit/Intake Forms).

    a. At the bottom of the page, click the **Programs using this Form** button.
    b. Select the **Program(s)** you want the Form attached to.



    c. Click the **Save Changes** button.

5. Attach the Form to a Location.

    a. At the bottom of the page, click the **Locations using this Form** button.
    b. Select the **Location(s)** you want the Form attached to.
    c. Click the **Save Changes** button.