Discontinue a Form or Remove Programs and Locations Attached to a Form

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Path: Main Menu > Admin Tools Menu > Form Builder

About

If you add a Form to NextStep in error, you can delete (discontinue) it. If the Form was previously used by your Agency, it is not recommended to discontinue the Form but rather rename the Form and remove the Programs and Locations attached to it. By doing this, the Form is kept in the system but is no longer available for use by your staff. If at a later date you want to make the Form available again for your staff, you can do so by editing the Form name and reattaching to Programs and Locations.

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Discontinue a Form Added in Error

This workflow is only recommended to be used if a Form was added in error and not used.

1. Navigate to the Form Builder by following the path above.
2. Click the **Select Form** drop-down and select a Form.
3. At the bottom of the page, click the **Discontinue This Form** button.



4. Click the **Yes** button to confirm you would like to discontinue the Form.

Remove Programs and Locations from a Form

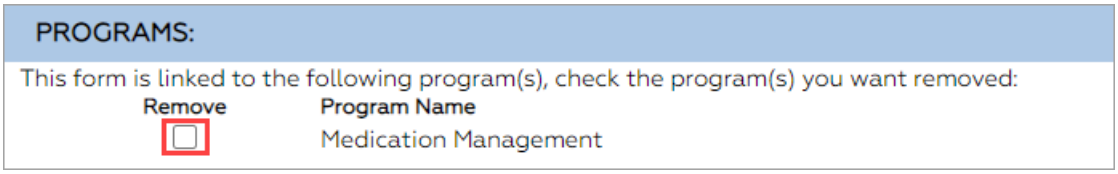
This workflow is recommended if you want to remove an existing Form from being selected as a Form that can be used by your staff.

1. Navigate to the Form Builder: **Main Menu > Admin Tools Menu > Form Builder.**
2. Click the **Select Form** drop-down and select a Form.
3. At the bottom of the page, click the **Edit This Form** button.



4. Edit the **Form Name** by adding a letter such as "x" prior to the Form name so that it drops to the bottom of the Select Form drop-down list.
5. At the bottom of the page, click the **Update** button.
6. With the Form still selected, click the **Edit This Form** button at the bottom of the page.
7. To:

- **Remove Program(s) Using Form**:
    a. At the bottom of the page, click the **Programs using this Form** button. This button is not displayed if the Form Type is a Pre-Admit/Intake Form. If this is is a Pre-Admit/Intake Form, see the next steps for removing Locations using the Form. The Setup Programs That Require This Form page is displayed.
    b. Select the **Remove** checkbox(es) for the Program(s) the Form is currently linked to.



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

- **Remove Location(s) Using Form**:
    a. At the bottom of the page, click the **Locations using this Form** button. The Setup Locations That Use This Form page is displayed.
    b. Select the **Remove** checkbox(es) for the Location(s) the Form is currently linked to.
    c. Click the **Save Changes** button.

See also Pre-Fill Form Fields Using Duplicate, Reference, and Fill Settingsfor form settings that control what a new copy of a form starts with.