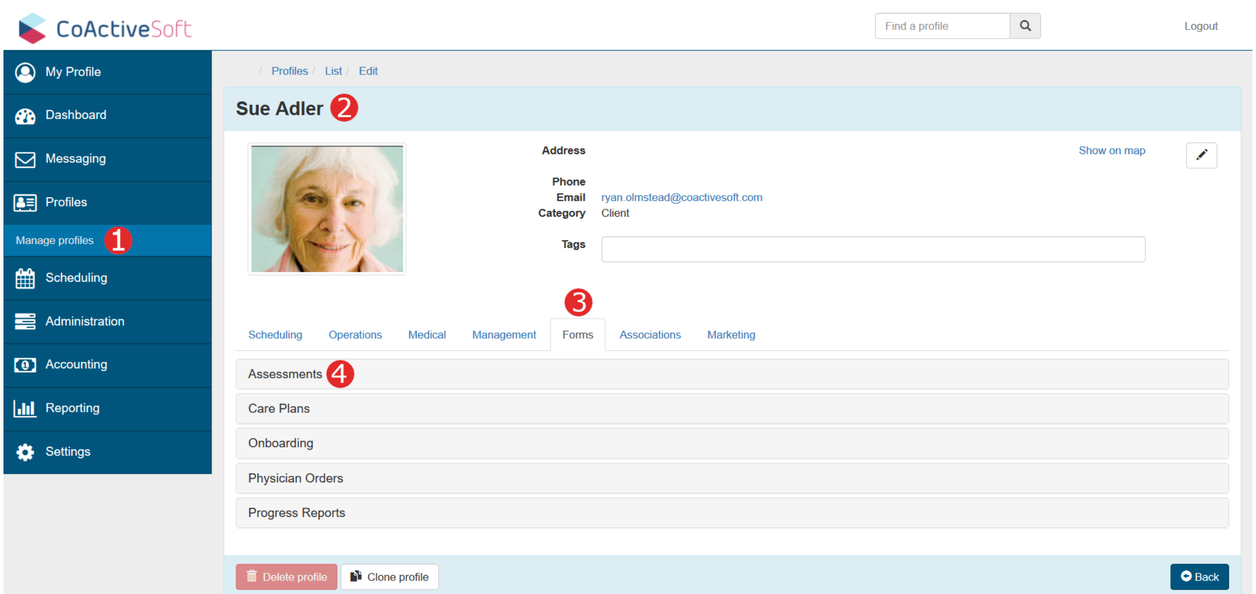
CoActiveSoft Forms

CoActiveSoft Forms Application

The CoActiveSoft forms application provides numerous methods to record information and agreements for all types of profiles. This can range from driving agreements for caregivers to care plans for clients.

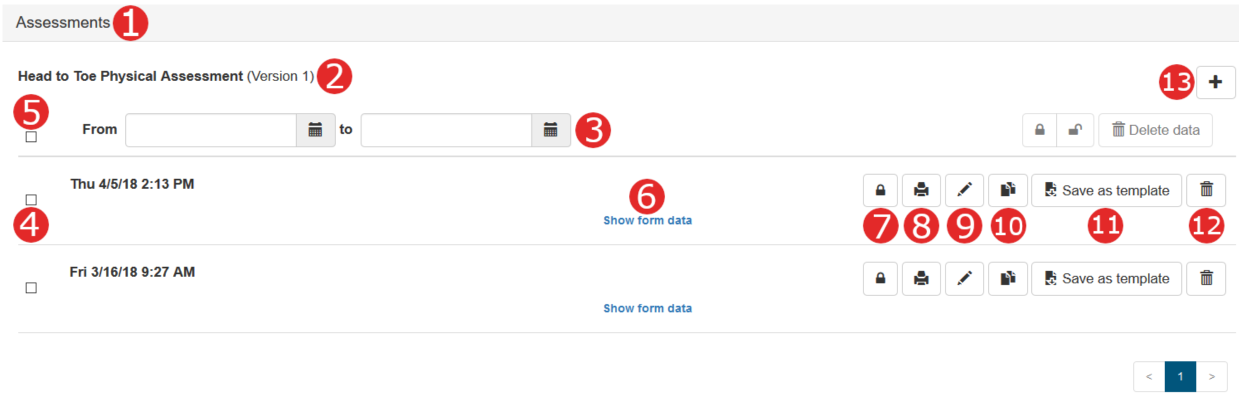
Accessing and Filling Out Forms

All forms are handled in the 'Forms' tab of a user profile:



To access a profile, go to 'Manage profiles' (1), search for a profile, then click on it (2). If you are stuck on finding a profile, refer to the CoActiveSoft Profile Management user manual.
To view and edit the forms of a given profile, navigate to the 'Forms' tab (3), and then the respective

category that contains the form (4). When clicking on a section, you are presented with many options for the form:



1 – Form Category

This is the category name that the form is listed under. This can be customized in the Settings menu, as described in the next section.

2 – Form Title

This is the name of the form. Change the names of forms by looking at the next section.

3 – Date Range

To filter your already filled out forms, use the date ranges to narrow down your search.

4 – Select one or Multiple

Check an individual form response, or multiple of them to lock, unlock, or delete forms at one time using the respective buttons above the list of forms.

5 – Select All

Select this check box to lock, unlock, or delete all forms using the respective buttons above the list of forms.

6 – Show Form Data

To view the data included in a form, click on this button. It is not possible to edit the form in this area.

7 – Lock Form Data

It is possible to lock a form from being edited further. Only supervisors can lock and unlock forms. When a form is locked, nobody else can edit them.

8 – Show Printable Version

By clicking this button, you can print the form. Optionally, this capability can be used to save PDF files of forms. Instead of printing to a printer, you can print to 'Microsoft Print to PDF' and download the PDF file.

9 – Edit Form

Click on this button to edit the information inside of the form.

10 – Clone Form

Click on this button to clone the form. The clone will be accessible in the current profile as a starting point, but nowhere else.

11 – Save Form as Template

Saving the form as a template will create a starting point for *all* profiles with this form if you create a new one.
When creating a new form, just specify the template that you would like to use.

12 – Delete

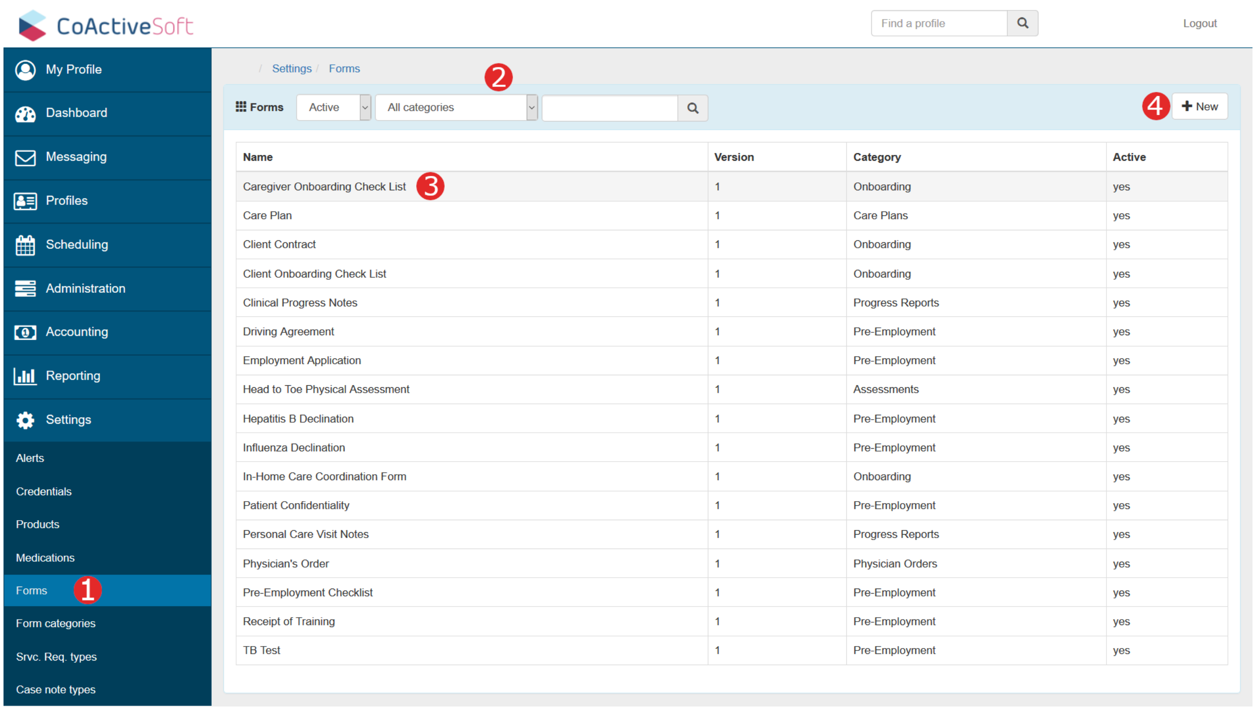
Click this button to delete the form.

13 – New Form

Click this button to create a new form.

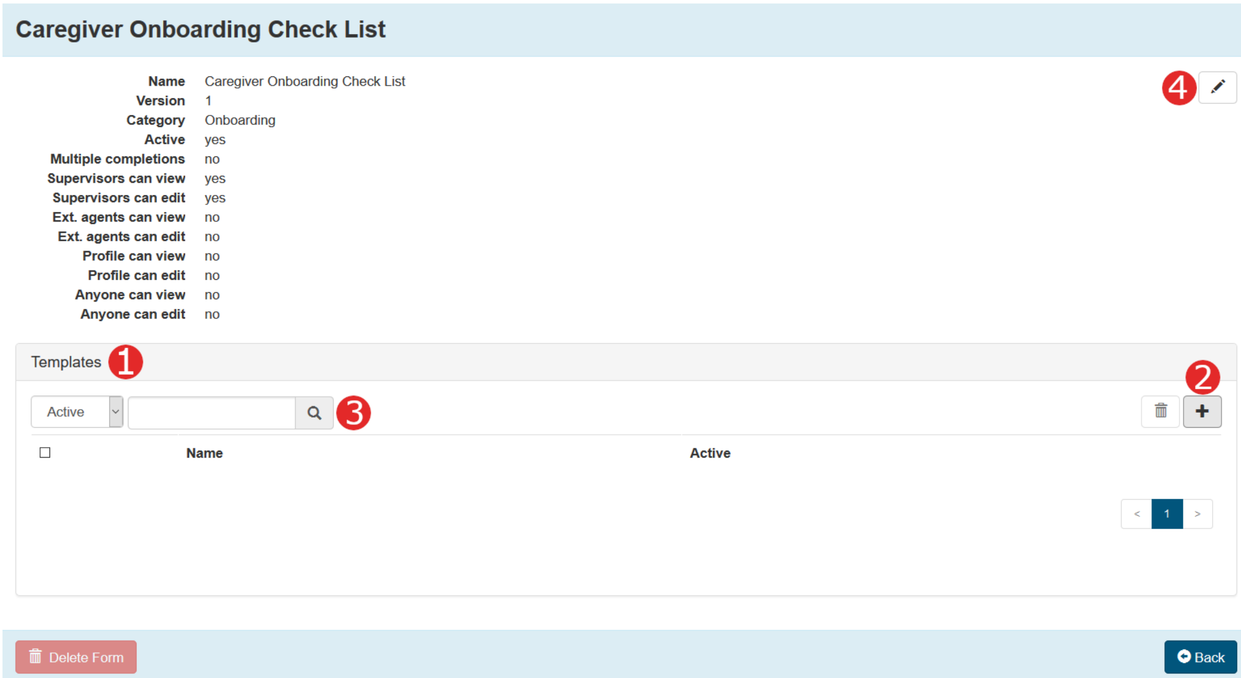
Customizing Forms

All the customization of the forms in CoActiveSoft are done within the ‘Forms’ Section of the ‘Settings’ part of the main menu (1):

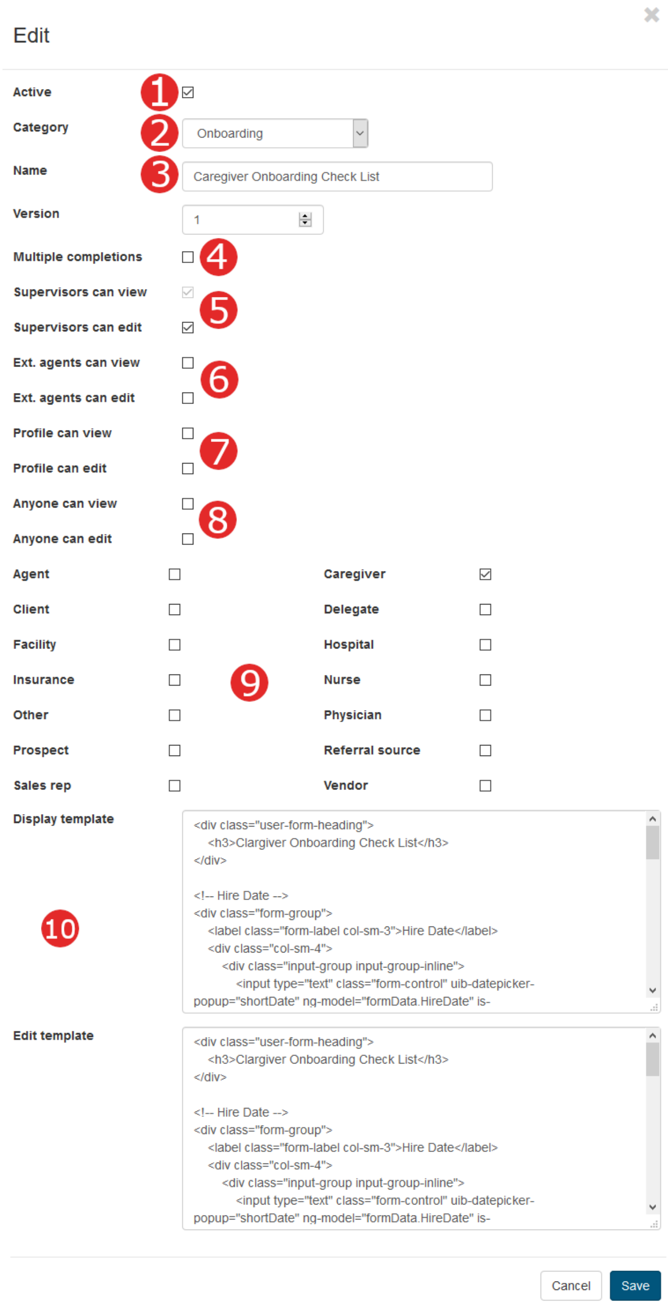


In this main page, it is possible to filter all forms by whether they are active or inactive, their category, and/or their name via the search box (2).
If you click on the ‘New’ button (4), it’s possible to program your own forms. Contact CoActiveSoft

support for a price quote if you would like to create a new form but do not know how to do so. If you have a programmer or web developer, they might be able to help instead.
By clicking on the form title (3), a brief overview of its permissions are shown:



In this page, it is possible to define templates for the form (1). After you click on the new button (2), you will be presented with the form and how it would look to whoever is filling it out. If you proceed to fill it out and then save it, this template will show up to whoever has access to the form as a starting point to continue filling out with additional information.
After templates are created, filter through them using the 'Active' drop down or the search bar (3).
It is also possible to edit the form overall, both the permissions and the overall setup of the form in its entirety (4):


Edit
Active
1
Category
2
Onboarding
Name
3
Caregiver Onboarding Check List
Version
1
Multiple completions
4
Supervisors can view
5
Supervisors can edit
Ext. agents can view
6
Ext. agents can edit
Profile can view
7
Profile can edit
Anyone can view
8
Anyone can edit
Agent
Caregiver
Client
Delegate
Facility
Hospital
Insurance
9
Nurse
Other
Physician
Prospect
Referral source
Sales rep
Vendor
Display template
10
<div class="user-form-heading">
<h3>Clargiver Onboarding Check List</h3>
</div>
<!-- Hire Date -->
<div class="form-group">
<label class="form-label col-sm-3">Hire Date</label>
<div class="col-sm-4">
<div class="input-group input-group-inline">
<input type="text" class="form-control" uib-datepicker-
popup="shortDate" ng-model="formData.HireDate" is-
Edit template
<div class="user-form-heading">
<h3>Clargiver Onboarding Check List</h3>
</div>
<!-- Hire Date -->
<div class="form-group">
<label class="form-label col-sm-3">Hire Date</label>
<div class="col-sm-4">
<div class="input-group input-group-inline">
<input type="text" class="form-control" uib-datepicker-
popup="shortDate" ng-model="formData.HireDate" is-
Cancel
Save

1 – Active

If this check box is selected, the form is active and visible for all the following parameters. If the check box is not selected, it should not be in use or able to be used by anyone.

2 – Category

Select the category that this form will fall under in the 'Forms' tab of the specified profiles (9).

3 – Name

The name to use for the current form being edited.

4 – Multiple Completions

Select this check box to enable more than one completion. If the form is an agreement it does not make sense to have multiple completions. If it is a report, it might be a good idea to have multiple completions.

5 – Supervisor Permissions

Select the respective check boxes to specify whether supervisors can edit or view this form.

6 – External Agents Permissions

Select the respective check boxes to specify whether external agents (i.e. users affiliated with a different company but have mutual clients) can edit or view this form.

7 – Profile Permissions

Select the respective check boxes to specify whether the selected profiles (9) can edit or view this form.

8 – General Permissions

Select the respective check boxes to specify whether anyone using this instance of CoActiveSoft can view or edit this form.

9 – Enabled Profile

Select the check boxes of certain profile types to include this form under the designated category (2) of the ‘Forms’ tab in their profile.

10 – Display / Edit Template

This is the main structure of the form, in basic HTML. If you have a programmer or developer hired, they can edit these parts of the form to suit your own needs. Optionally, contact CoActiveSoft customer support to do so for you, as well as a price quote for doing so.
The ‘Display template’ section defines how the form looks when you print or download it. The ‘Edit template’ defines how it looks for anyone filling out the form.