



Quick Forms Module User Guide

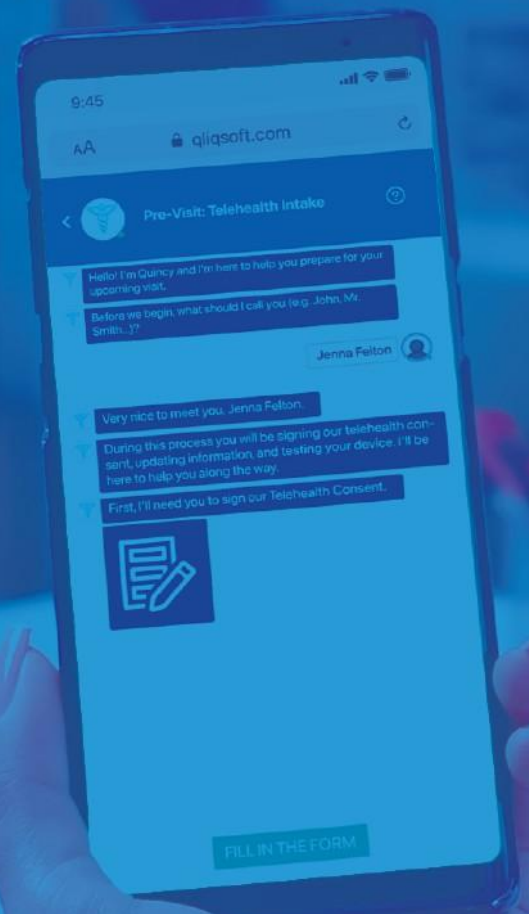


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Quick Forms User Guide

Welcome to the QliqSOFT Quick Forms User Guide.

Introduction to Quick Forms

What are Quick Forms, and what are their uses?

The Quick Forms enable users to create versatile custom forms for Patient and Recipient use.

The most important, and fundamental aspect of Quick Forms is their capacity to gather qualitative and quantitative information from Patients or other recipients.

Before proceeding with a detailed overview of each form field, it is essential to understand the data types supported.

For QliqSOFT administrators, understanding these crucial distinctions as early as possible increases the potential for using the fields in specific use cases as effectively as possible.



Supported Data Types

Field Name	Data Type	Qualitative/Quantitative/ Neither/Either	Used by Scored Form?	Used by Conditional Logic?
Address	String	Qualitative	No	No
Blood Pressure	Integer	Quantitative	No	??
Boolean	Boolean	Quantitative	Yes	Yes
Check List	Tuple	Either	Yes	Yes
Date	String	Quantitative	No	No
Date+Time	String	Quantitative	No	No
Dosage	Integer	Quantitative	No	No
Drop-Down	Set	Either	Yes	Yes
Email	String	Qualitative	No	No
Frequency	Integer-Tuple	Quantitative	No	No
Markdown	String	Neither	No	No
Notice	String	Neither	No	No
Number	Float	Quantitative	No	Yes
Pain Scale	Tuple	Qualitative* Counted as qualitative as it is based on self-reported perception	No	No
Phone Number	Integer	Quantitative	No	No
Radio Buttons	Tuple-values can repeat	Quantitative	Yes	Yes
Ratings	Set	Qualitative	Yes	No
Signature	Image/ data	Neither	No	No
Text	String	Either	No	No
Time	String	Quantitative	No	No
Upload a File	N/A	Neither	No	No
Weight	Float	Quantitative	No	??

Quick Forms Landing Page

The Quick Forms Landing Page provides users with three different sections for Quick Form configuration. These sections are as follows:

1. Forms List:

Lists all of the forms created in the organization in an ascending/descending order.

2. Form Fields List:

Lists all of the fields that have been inserted into a form. Form Fields List also offers seven action buttons that allow the user to configure the form to fit their use case as best as they can.

These action buttons are as follows:

- +NEW FIELD:** adds another field to the form.
- +NEW SUBFORM:** adds a new subform (form within the form) to the form.
- +EXISTING SUBFORM:** adds an existing subform to the form.
- PREVIEW:** when clicked, displays a preview of the form.
- CONDITIONAL LOGIC:** allows the configuration of fields and subforms to perform certain actions due to predetermined conditions being met.
- TRANSLATIONS:** allows the user to customize the translations that non-English speaking users will see when they interact with the form.
- WEBHOOK MAPPING:** allows users to set up data equivalencies that are necessary when creating webhooks. Having webhook mappings in place ensures that a data point in the form will have a corresponding counterpart in the target database.

3. Field Configuration:

Provides the necessary tools to configure each data type to the needs of the user. The details of each field type vary, but for most data types, this section provides the ability to:

- Enable/Disable Field
- Toggle Input Requirement (Patients must then complete the field)

Quick Forms Functionality

Forms List

The Forms List allows users to perform the following actions:

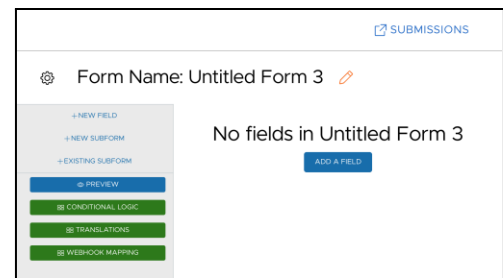
Create New Form

To start working with a new form, click the blue + icon next to the 'Forms' title; doing this will open a window to create a new Quick Form. Give form a name and press Save.

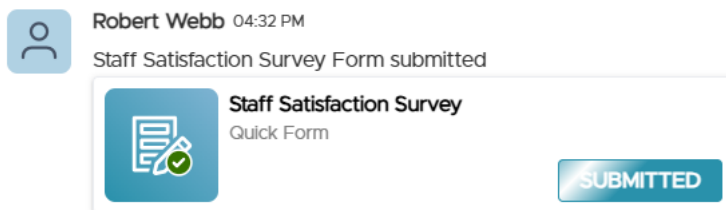
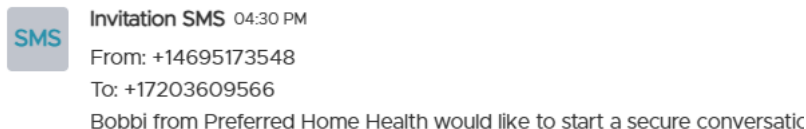


When the new form is created, the Form Field List and the Field Configuration sections appear as follows. From here, the next step will be to start inserting the following:

- Fields (using 'Add A Field' to start)
- (Optional) Subforms
- (Optional) Conditional Logic
- (Optional) Translations
- (Optional) Webhook Mappings

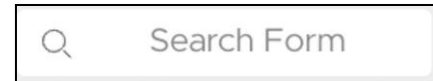


NOTE: When a form is sent, the title of the form is visible to both the recipient and the agent. It is recommended that the name selected make sense to the recipient. For example, instead of SDoH, consider using something like Social Factors Impacting Health.



Search Existing Form

In organizations where there are a large number of forms, using the search button to find an existing form is the easiest way to do so.



Sort Form

The Sort form button allows the user to sort forms alphabetically in either ascending or descending order.



Duplicate/Delete Form

The Delete and Duplicate buttons are used to either remove a form from the organization or make a copy of the selected form.



Form Fields List

The Forms List allows users to perform the following actions:

+NEW FIELD

The + NEW FIELD button allows the user to insert one of the twenty-two types of fields, so they can be configured to fit the needs of the organization.



+NEW SUBFORM

The +NEW SUBFORM button allows the user to insert a new subform into the existing form. If necessary, the subform interactivity can be determined using Conditional Logic clauses.



+EXISTING SUBFORM

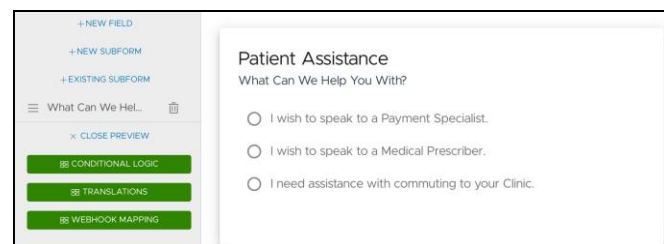
The +EXISTING SUBFORM button allows the user to insert a previously created subform into the existing form. If necessary, the subform interactivity can be determined using Conditional Logic clauses.



PREVIEW

The Preview Section allows users to view how the form will appear to the Patients when they're prompted to fill it out.

Note: While in Preview Mode, the user cannot make any submissions for this form.



CONDITIONAL LOGIC

The Conditional Logic section allows users to set conditions that trigger certain actions when the Form inputs satisfy them.

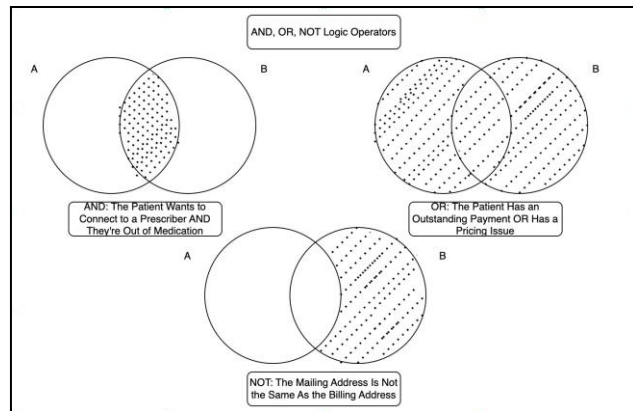
To understand the full capabilities of the Conditional Logic clauses, the first issue that needs to be explained is the logic operators that are used

- **AND:** Valid when two or more conditions are met
- **OR:** Valid when either one of the conditions are met
- **NOT:** Valid when everything else but the condition has been met.

The screenshot shows the 'Conditional Logic' configuration window for a form titled 'Patient Assistance'. On the left is a sidebar with options: '+ NEW FIELD', '+ NEW SUBFORM', '+ EXISTING SUBFORM', and a list of existing fields: 'What Can We Help...', 'What Medication...', 'New Field', and 'Are You Out of Y...'. The main area is titled 'Conditional Logic' and contains a configuration for the question 'What Medication Do You Need Assistance With?'. It shows two conditions: 'Show if:' and 'And if:'. The 'Show if:' condition is set to 'Field' with the value 'What Can We Help You With?' and the operator 'Equals' with the value 'I wish to speak to a Medical Prescriber.'. The 'And if:' condition is set to 'Field' with the value 'Are You Out of Your Medication' and the operator 'Equals' with the value 'Yes'. A '+ CONDITION' button is at the bottom.

There are three main criteria for measuring conditions:

- **Field:** The condition is based on the value of a Form/Subform field.
- **Note:** This excludes the Markdown and Notice data types, as they don't take user input when a form is filled.
- **Patient Attribute:** The condition is based on the value stored in preset variable categories.



Once these conditions are met, the next step is to set up the conditions.

Doing so requires deciding what the value of conditions is going to be measured on. Doing so can be accomplished by the following methods:

- **Equal to**
- **Does Not Equal**
- **Is Less Than**
- **Is Greater Than**
- **Is Less Than Or Equal To**
- **Is Greater Than Or Equal To**

Note: Each Conditional Logic Instance can have multiple conditions within them; additionally, the limit of conditional logic tests you can perform in a quick form isn't small by any means.

```
patient.firstName
patient.lastName
patient.middleName
patient.mrn
patient.mobileNumber
patient.email
patient.dob
patient.groups
```

As a mental exercise, it is smart to consider potential use cases for conditional logic where you may need only one simple condition for a simple form, or two dozen conditions for an extensive and complex form.

Translations

The Translations section allows users to provide greater user accessibility for non-English speakers by giving them the ability to add translations to their organization's Quick Forms.

When a form is created, any field that has coherent English text written in it is automatically translated to the target language. When the user clicks the Translations button, they are able to view these translations.

The screenshot displays a side-by-side comparison of a form in English (US) and Spanish (Español). The English version on the left includes questions like 'What Can We Help You With?', 'Are You Out of Your Medication', and 'Do You Have an Outstanding Payment, or a Pricing Issue?'. The Spanish version on the right provides the corresponding translations. At the bottom right, there are 'SAVE' and 'DISCARD ALL CHANGES' buttons.

After selecting the target language from the drop-down on the left side of the screen, the users can then complete the translation by clicking the globe icon to the right of the drop-down.

Note: Although the Quick Forms text fields are automatically translated, the custom translation edits can be made in the rows on the right side of the screen.

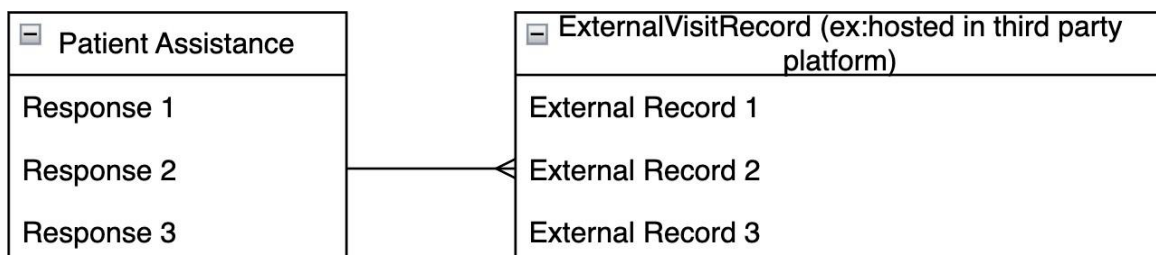
Webhook Mapping

Webhook Mapping is the most fundamental step of webhook data transfer using the QliqSOFT product suite.

By setting up the webhook name, the users can understand what Patient input will correspond to at the Webhook's destination.



The screenshot shows a mapping table with two columns: 'Original name' and 'Webhook name'. It maps form fields to webhook parameters: 'Patient Assistance' to 'PatientAssistance', 'What Can We Help You With?' to 'patientReason', 'Are You Out of Your Medication' to 'isOutOfMeds', and 'Do You Have an Outstanding Payment, or a Pricing Issue?' to 'isPriceOrPmt'. 'SAVE' and 'DISCARD ALL CHANGES' buttons are at the bottom right.

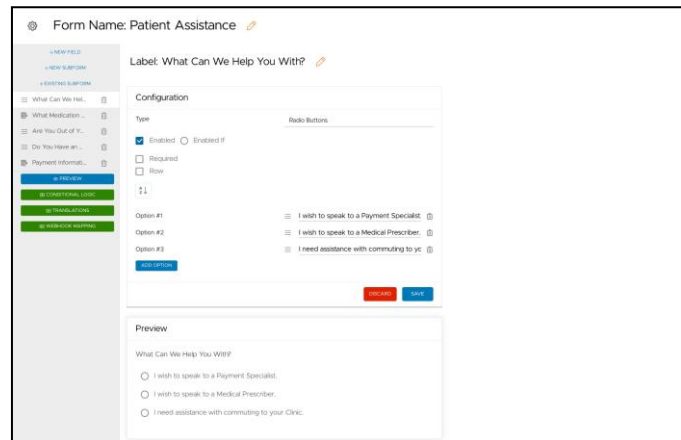
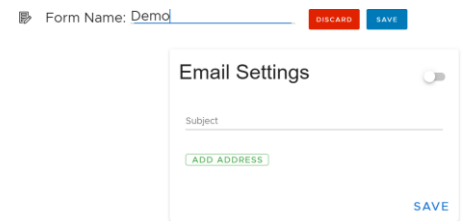
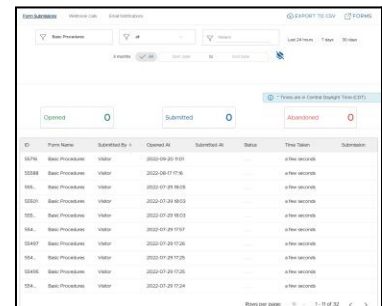
Note: To gain extensive information on Webhooks, refer to the Chat Widget Module Guide for Internal users.



Field Configuration

The Field Configuration section allows the users to configure the details of each field they insert into the Quick Form. The Field Configuration section has six important features necessary for configuring the form fields. They are as follows:

- **Form Name:** Allows the user to edit the form name using the  icon next to it.
- **Field Label:** Allows the user to edit the form field label using the  icon next to it.
- **Configuration:** Allows the user to configure the specifications of each form field.
- **Preview:** Provides the users with a demonstration of what each field will look like when the Patient interacts with it.
- **Settings:** Allows the user to configure the settings of each Quick form for the following attributes:
 - Email Settings- allows the user to attach a Quick Form to be sent to the desired email address for each submission.
 - EMR Upload Settings-allows the user to associate a patient's emergency medical records with the Quick Form.
- **Submissions:** The Submissions Window provides the user with the logs of all of the following:
 - Form Submissions
 - Webhook Calls
 - Email Notifications

ID	Form Name	Submitted By	Created At	Submitted At	Status	Time Taken	Submission
1079	Basic Procedure	Valter	2022-05-20 17:01		after seconds		
1080	Basic Procedure	Valter	2022-05-20 17:16		after seconds		
1081	Basic Procedure	Valter	2022-05-20 18:08		after seconds		
1082	Basic Procedure	Valter	2022-05-20 18:03		after seconds		
1083	Basic Procedure	Valter	2022-05-20 18:03		after seconds		
1084	Basic Procedure	Valter	2022-05-20 18:07		after seconds		
1085	Basic Procedure	Valter	2022-05-20 18:06		after seconds		
1086	Basic Procedure	Valter	2022-05-20 18:06		after seconds		
1087	Basic Procedure	Valter	2022-05-20 18:06		after seconds		
1088	Basic Procedure	Valter	2022-05-20 18:06		after seconds		
1089	Basic Procedure	Valter	2022-05-20 18:06		after seconds		

Configuration

The Configuration section provides every form field with the necessary options to customize the contents and the specifications of each field type and instance. The Configuration options have aspects that are shared across all data types, but each field type can have different configuration settings depending on what the Quick Forms module allows it to be used for.

Note: To fully understand and explore the different ways field types can be used, refer to the initial field data chart featured in Section 1.

Field Types

Address

The address field type is used to gather a patient's billing/mailing/other address information.

Its Configuration options are as follows:

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls Patient Data from outside of the Quick Form to populate the field when the icon is clicked.	Option: Location

Blood Pressure

The Blood Pressure field type is used to gather a patient's blood pressure if they're able to measure it using the knowledge/tools available to them. The value range/parameters for this field type are customizable.

Info:

Blood pressure is measured in millimeters of mercury (mmHg) and is given as two figures:

- Systolic pressure – the pressure when your heart pushes blood out.
- Diastolic pressure – the pressure when your heart rests between beats.

For example, if your blood pressure is "140 over 90" or 140/90mmHg, it means you have a systolic pressure of 140mmHg and a diastolic pressure of 90mmHg.

As a general guide, ideal blood pressure is at or lower than 120/80mmHg high blood pressure. Anything higher than these values is considered to be elevated. Low blood pressure is considered to be below 90/60 mmHg.

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Custom BP Gates	Allows the user to configure the Blood Pressure Parameters	Default Values: Systolic Minimum: 10 Systolic Low: 90 Systolic Ideal: 120 Systolic Pre-High: 140 Systolic Maximum: 250

		Diastolic Minimum: 10 Diastolic Low: 60 Diastolic Ideal: 80 Diastolic Pre-High: 90 Diastolic Maximum: 250
--	--	---

Boolean

The Boolean field type is used as a binary test for a logic test. A logic test can be something as simple as a basic question, or a complex question that can be answered with binary answers (Either the statement is True(Yes), or the Statement is False(No).

The Boolean field type's default value is False (No).

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Checked	The default value is switched to Yes (True).	
Checked If	The default value is switched to Yes (True) if a condition has been met.	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn

		patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	

Text

The Text field type is used to enter a String value into the text field. This field's input can be used to provide an answer for a prompt that may not necessarily be answered with a binary answer or a choice from a set of answers.

Configuration

Type

Text

☒ Enabled
 ☐ Enabled If

☒ Required

☒ Minimum Length

☒ Maximum Length

☐ Hint

☒ Pull From

0

0

Select

▼

DISCARD

SAVE

Preview

Text *

Field is required

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal

		Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	It makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Minimum Length	Enter an integer value to set a lower character limit for the String input the user provides.	Default Value:0
Maximum Length	Enter an integer value to set an upper character limit for the String input the user provides.	Default Value:0
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Parameter: First Name Last Name Name patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups

Date

The Date field type is used to enter a date value for any given purpose. This data type can be configured to autofill the date with the current date or record the date in different formats.

Configuration

Type

Date

☒ Enabled
 ☐ Enabled if

☒ Required

☐ Autofill current date

Format

YYYY-MM-DD

☐ Pull From

DISCARD

SAVE

Preview

Date *

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Autofill Current Date	Uses the system date data to autofill the field.	
Format	Changes the date display format	Options: YYYY-MM-DD MM/DD/YYYY DD/MM/YYYY
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	

Date+Time

The Date field type is used to enter a date value for any given purpose. Additionally, this field also features the time of a certain event (current time, time of event occurrence, etc.).

The screenshot shows the configuration and preview for a Date+Time field. The configuration section includes options for Type (Date + Time), Enabled (checked), Enabled If (unchecked), Required (checked), Autofill current time (unchecked), Format (Select), and Pull From (checked). There are Discard and Save buttons. The preview section shows the field rendered as 'Date+Time *' with a calendar icon and 'Please select a date' text, and 'Time *' with a clock icon and 'Please select a time EDT' text.

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.
Autofill Current Date	Uses the system date data to autofill the field.	
Format	Changes the date display format	Options: YYYY-MM-DD MM/DD/YYYY DD/MM/YYYY
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Date Date+Time

Dosage

The Dosage field type is used to enter the value of a substance dosage that the system needs to record. This field can be used to document anything from medication consumption to any weight or volume that can be measured.

The Units of measurement are as follows:

- ml
- mg
- other

The screenshot shows the configuration interface for a 'Dosage' field. In the 'Configuration' section, the 'Type' is set to 'Dosage'. The 'Enabled' checkbox is checked, and the 'Required' checkbox is also checked. There are 'DISCARD' and 'SAVE' buttons. The 'Preview' section shows a 'Dosage' field with a dropdown menu for 'Units' open, displaying options: 'ml', 'mg', and 'other'.

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.

Drop-down

The drop-down field type is used to create a set of options listed in an expandable/collapsible drop-down format.

Whatever Options are added to the configuration will appear in the order in which they were added.

Configuration

Type

Drop-down

☒ Enabled
 ☐ Enabled If

☒ Required
 ☐ Hint

Option #1

Dessert

Option #2

Dried Goods

Option #3

Soups

Option #4

Stews

Preview

Favorite Food Type

Dessert

Dried Goods

Soups

Stews

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	

Email

The email field type is used to log a Patient's email address.

Configuration

Type

Email

☒ Enabled
 ☐ Enabled If

☒ Required
 ☐ Hint

☐ Pull From

DISCARD

SAVE

Preview

Email *

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a	Parameter:

	condition has been met	patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Email

Frequency

The Frequency field type records the number of instances a certain event occurs or produces a certain outcome.

The Frequency field type can only take integer values for the following time measurements.

- Hour
- Day
- Week
- Month
- Year

Configuration	Function	Details
Enabled	Makes a field instance visible by default	

Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.

Markdown

The Markdown field type allows users to insert Markdown texts into the Quick Forms.

Markdown is a lightweight markup language for creating formatted text using a plain-text editor. Its main purpose is to control the display of the document and enrich its content to facilitate processing. The contents of the Markup field type are not visible to the Patients.

Configuration

Type

Markdown

B I U H1 H2 x₂ x²

This is a test Markdown Field

The Save button is blue colored.
The Discard button is red colored.

DISCARD SAVE

Notice

The Notice field type allows users to insert notice texts, images, and other attachments into the Quick Forms.

Unlike Markups, the main purpose of Notices is to communicate messages with the Patients as they're filling the Quick Forms

Configuration

Type

Notice

B I U H1 H2 x₂ x²

This is a test Notice

DISCARD SAVE

Number

The Number field type allows Patients to enter an integer value as a response to a prompt. The uses for this particular field type vary greatly, as the user input can be the response to virtually any question that can be answered with an integer, as long as it is suitable in the context of the form.

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Minimum Length	Enter an integer value to set a lower character limit for the String input the user provides.	Default Value:0
Maximum Length	Enter an integer value to set an upper character limit for the String input the user provides.	Default Value:0
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	

Pain Scale

The Pain Scale field type allows Patients to quantify the level of pain they are experiencing by ranking it on a scale. It should be assumed that there is no quantitative method to accurately measure a person's felt pain level and compare it to someone else's (with the given tools). The pain scale is a qualitative measure of pain intensity.

The pain scale classifies pain intensity as:

0-5: No-Moderate Pain

5-10: Moderate-Critical Pain

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Pain Scale

Phone Number

The Phone Number field type is used to record a Patient's phone number. The default area code for this field is +1 (USA & territories, Canada).

Configuration

Type

Phone Number

☒ Enabled
 ☐ Enabled If

☒ Required
 ☐ Hint

☐ Pull From

DISCARD

SAVE

Preview

+1

Phone # *

Phone Number Required

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Phone

Radio Buttons

The Radio Buttons field type allows the users to create multiple-choice answers for a given prompt. This field type offers a great deal of versatility, as the Options accept String-type responses, which can be configured to fit a wide range of use cases that require a multiple-choice answer.

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Row	When toggled, the Radio Buttons are juxtaposed instead of listed in an ascending order.	
Option	When filled in, the values will appear as choices to Patients	To save the field, the user must add at least two Options.

Ratings

The Ratings field type is used to gather a Patient's rating on any particular prompt. The answers provided in this section can be later viewed in the Patient Feedback dashboard in the Reports Module>Virtual Visits Activity.

Configuration

Type Ratings

☒ Enabled ☐ Enabled If

☒ Required

☐ Numbers

DISCARD SAVE

Preview

Ratings *

☆☆☆☆☆

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.
Numbers	When toggled, Numbers will appear instead of stars as a measure of rating	

Signature

The Signature field type is used when there is a need to obtain a Patient's electronic signature. Once the patient uses the signature marking pad and completes the form, their drawn input is saved as a PNG and can be viewed in the Form Submissions Subsection in the Reports Module.

Configuration

Type

Signature

Name

Patient Signature

☒ Enabled
 ☒ Required


DISCARD

SAVE

Preview

New field: *

CLEAR



Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	"[FIELD NAME]" is a required field.

Text

The Text field type allows Patients to respond to a prompt using a String response. This field can be used in a variety of ways by adjusting the character limit. For example, the field can be used for a Patient to write a long explanation of their situation when the character limit is set high or briefly describe their issue in fewer than 30 characters.

Configuration

Type

Text

☒ Enabled
 ☐ Enabled If

☒ Required

☐ Minimum Length

☐ Maximum Length

☐ Hint

☐ Pull From

DISCARD

SAVE

Preview

Text *

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Minimum Length	Enter an integer value to set a lower character limit for the String input the user provides.	Default Value:0
Maximum Length	Enter an integer value to set an upper character limit for the String	Default Value:0

	input the user provides.	
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Parameter: First Name Last Name Name patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob patient.groups

Time

The Time field type is used to record the time during which an event occurs(ed). This field type allows the Patients to autofill the current time if they choose.

Configuration

Type

Time

☒ Enabled
 ☐ Enabled If

☒ Required

☐ Autofill current time

☐ Hint

☐ Pull From

DISCARD

SAVE

Preview

🕒 Time *

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber patient.email patient.dob

		patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Autofill Current Time	When toggled, the system time will be used to populate this field.	
Hint	Provides the Patients with a hint message that prompts them to input a value for the field.	
Pull From	Pulls data from outside of the Quick Form to populate the field when the icon is clicked.	Time of Day

Upload a File

The Upload a File field provides Patients with the tools to upload file(s) and specify the types of files they can upload as a part of their submission.

Configuration

Type

Upload a File

☒ Enabled
 ☐ Enabled If

☒ Required

☒ Multiple Files

☒ Specific Kind

Select

DISCARD

SAVE

Preview

New Field *

+

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn

		patient.mobileNumber patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.
Multiple Files	When toggled, allows the submission of multiple files	
Specific Kind	When selected, the user will be able to determine what file types can exclusively be uploaded to the field.	File Categories: Images Videos Word Documents PDFs

Weight

The Weight field type allows users to specify the weight of either their person or an object.

For instance, depending on the use case of the form, the patient might enter their weight, or use the weight field to specify the weight of food they’ve consumed (e.g., 400g lean ground beef).

Configuration	Function	Details
Enabled	Makes a field instance visible by default	
Enabled if	Makes a field instance visible if a condition has been met	Parameter: patient.firstName patient.lastName patient.middleName patient.mrn patient.mobileNumber

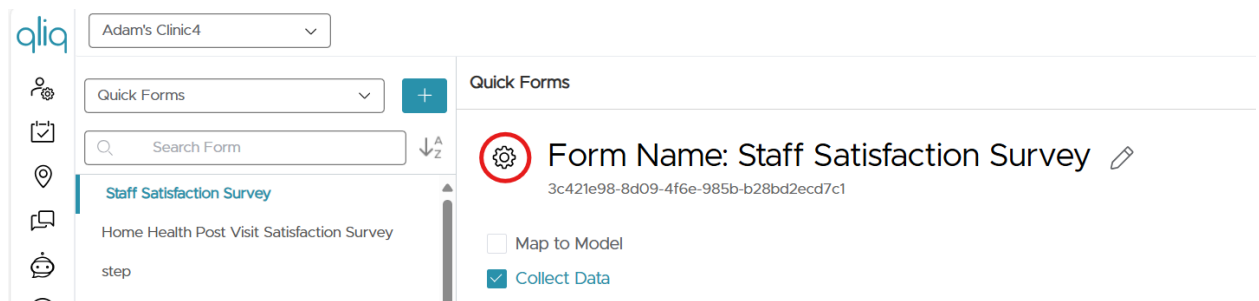
		patient.email patient.dob patient.groups Conditions: Equal to Does Not Equal Is Less Than Is Greater Than Is Less Than Or Equal To Is Greater Than Or Equal To
Required	Makes the user input mandatory to complete the form submission.	“[FIELD NAME]” is a required field.

Settings

The Settings tab allows the user to configure the settings of each Quick Form for the following attributes:

- Email Settings
- EMR Upload Settings
- Scored Form Settings
- Step-by-Step Form Settings

To access Settings, select the Quick Form and then click on the gear icon



Email Settings

The Email Settings Section allows the user to configure a target email address that will receive all the form submissions that are made by Patients. The main purpose of using this feature is to either manually track when a submission is made or use an API to track and log any submission data that is sent over, which can then be used for various purposes.

Email Settings

☒

Form 1-Includes all fields

Email Address *

peanut@butter.com

Email Address *

abc@123.com

ADD ADDRESS

SAVE

EMR Upload Settings

If the organization has EMR settings enabled, then the users have direct access to the Patients' Emergency Medical Records when this setting is toggled on. They can then use this direct access to upload EMR data obtained in the Quick Form and then use it in various QliqSOFT application functions.

EMR Upload Settings



Automatic Upload ☒

0

Folder Path

Mark as Reviewed ☒

Assign To

SAVE

Scored Forms

Scored Forms enables the administrator to

- Identify which questions in the Quick Form will be scored
- Attach a discrete numeric value to each answer
- Total all scores associated with answers selected by the patient
- Group scores into categories

To enable a Quick Form to be scored by clicking the Scored Forms toggle on.

 Form Name: Medication Therapy Check in 
5a0ff5a3-275d-4b65-9866-0ce304e3ef93

Scored Form 

Next, toggle on the questions that you want to score, and then add scores to each question.

Question	Scored						
Have You Talked to Your Doctor or Pharmacist about your Issue(s)?	<input type="checkbox"/> Off >						
Would You Like Your Doctor's Office to Contact You to Develop a Better Plan?	<input checked="" type="checkbox"/> On >						
<table border="1"> <thead> <tr> <th>Option</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>10</td> </tr> <tr> <td>No</td> <td>0</td> </tr> </tbody> </table>	Option	Score	Yes	10	No	0	
Option	Score						
Yes	10						
No	0						
What Would Help You Most to Stick to Your Medication Routine?	<input type="checkbox"/> Off >						

Finally, create and name the categories and indicate the answer totals that will be associated by each category. Press **Save**.

Administrators have the option to select the colors used in the report pie chart, if desired. To select colors, tap into the color bar and either type in the display color or click on the color visual to choose the desired color and click **OK**.

Score Classification



Define score ranges and categories for result classification.

Classification 1

Min Score

0

^

v

Max Score

0

^

v

Classification Color

i

Classification 2

Min Score

4

^

v

Max Score

10

^

v

Classification Color

i

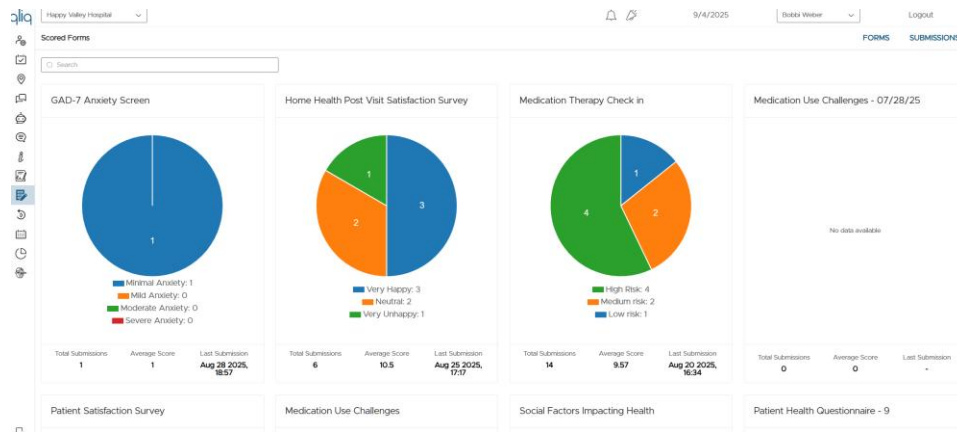
+ ADD CLASSIFICATION

NOTE: Once any recipient has completed the form, the answer values cannot be changed. This prevents corruption of the Score Form reports. Administrators can change category names and ranges at any time, and these changes are applied to the historical data in the Scored Forms report.

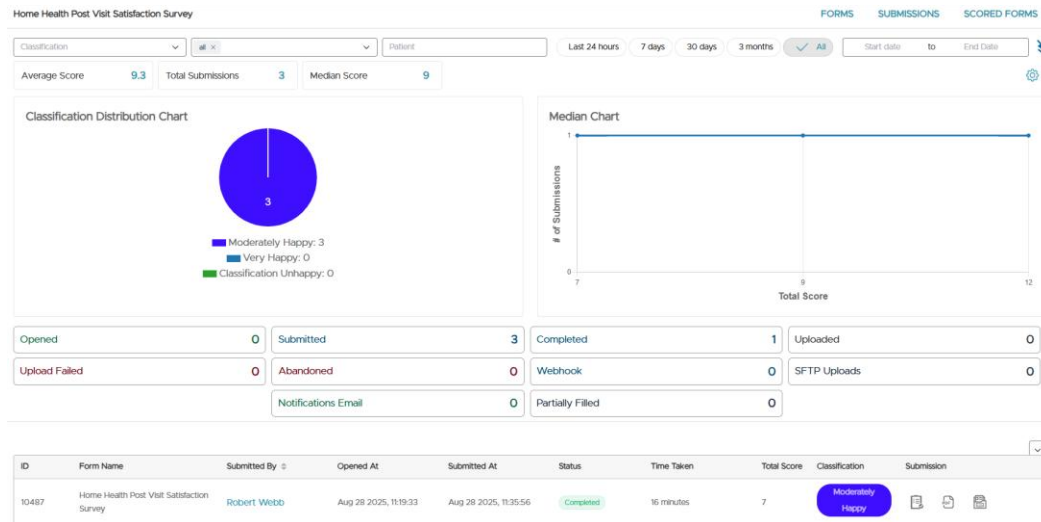
Once a Scored Form is saved, it dynamically creates a report for administrators to use to track and analyze patient or recipient responses. That report can be accessed by clicking on the Scored Forms link.

A new page launches which contains all the Scored Forms saved and any patient/recipient data submitted to date.

NOTE: Patients and recipients see only the questions and answers. They do not see their individual answer scores or the category associated with their score.



Administrators can click into any pie chart to filter the data and see details of patient responses.



Scored Forms report status definitions


Status	Definition
Abandoned	A scored form was sent to the patient or recipient and was not completed
Submitted	A completed scored form was received from the patient or recipient
Completed	The scored form detail was opened by the administrator and marked as complete.


Details can be reviewed by clicking on the icons


Icon	Uses
	View recipient answers, score, classification and mark the document as complete.
	View recipient answers, score, classification and download the PDF.
	View status details for the form.


The administrator views the details, checks the "Mark as Complete" checkbox, and then presses Submit.


Submission

















Do you feel ready to take care of your health after the visit?

☐ Yes
☒ Somewhat
☐ No

Would you recommend us to a friend?

☒ Yes
☐ Maybe
☐ No

Score Classification: Moderately Happy

Score Summary: Total Score 7 / 19

Field Label	Score	Patient Response
How happy are you with the care you got during the visit?	1	Very Happy
Did the nurse or helper listen to you and answer your questions?	1	Yes
Did the nurse or helper arrive on time?	1	Yes
Did the nurse or helper explain things so you could understand?	1	Yes
Do you feel ready to take care of your health after the visit?	2	Somewhat
Would you recommend us to a friend?	1	Yes

☐ Mark as Completed SUBMIT

Step-by-Step Forms

Step-by-step forms guide the recipient through a form one field at a time. To set this up, administrators click the gear icon within a specific Quick Form.

Quick Forms



Form Name: Medication refill 


04fb96cf-f54b-4334-8a8c-f7391d1357c9

☒ Map to Model
☐ Collect Data

Prescription

A new window appears. Toggle the **Step-by-Step Form** on.

Quick Forms

Form Name: Medication refill 

04fb96cf154b-4334-8a8c-f7391d1357c9

Scored Form Off >

Step-by-Step Form On > Email Settings Off >

EMR Upload Settings Off >

To return to the main forms screen, click on the paper and pencil icon.

Submissions

The Submissions subsection contains the log of all Patient form submissions, Webhook Calls, and Email Notifications

The Form Submissions Subsection's filtration methods are:

- Filtering by Form Name
- Filtering by Form Status (all/submitted/opened)
- Filtering by Patient Name
- Filtering by Time Periods (24 hours, 7 days, 30 days, 3 months, All)
- Filtering by Start & End Dates

The Form Submission subsection contains the following counters:

- Opened
- Submitted
- Abandoned
- Upload failed

The Form Submission Subsection has three tabs that provide logs on the instances of the following features:

- Tab 1: Form Submissions
- Tab 2: Webhook Calls
- Tab3: Email Notifications















Note: The counters values are the same between the tabs.

Form Submissions

The Form Submissions Tab contains all the Patient submissions that have been made during their virtual visit.

The Form Submissions categories are as follows:

- ID
- Form Name
- Submitted By
- Opened At

ID	Form Name	Submitted By	Opened At	Submitted At	Status	Time Taken	Submission
56123	Test Form	person one	2023-02-09 16:47		Submitted	a few seconds	
56116	Test Form	Person one	2023-02-09 16:41		Submitted	a few seconds	
56104	Test Form	random person	2023-02-09 12:22		Submitted	a few seconds	
56103	Test Form	random person	2023-02-09 12:21		Submitted	a few seconds	
56102	Test Example	any 1	2023-02-09 12:00		Submitted	a few seconds	
56101	Test Form	any 1	2023-02-09 11:59		Submitted	a few seconds	
56100	Test Form	any 1	2023-02-09 11:59		Submitted	a few seconds	
560...	Test Example	test email	2023-01-25 16:03		Submitted	a few seconds	
560...	Test Example	test email	2023-01-25 16:00		Submitted	a few seconds	
560...	Test Form	patient 1	2022-12-30 16:55		Opened	a few seconds	
560...	Test Example	Visitor	2022-12-28 10:39		Opened	a few seconds	
55958	Test Form	visitor 3	2022-11-10 13:40		---	a few seconds	
55957	Test Form - copy	patient 1	2022-11-10 13:30		---	a few seconds	
55956	Test Form	patient 1	2022-11-10 13:29		---	a few seconds	
55955	Test Form	patient 1	2022-11-10 13:28		---	a few seconds	

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- **Submitted At**
- **Status**
- **Time Taken**
- **Submission** [button]-click on this button to view user submissions.
















Webhook Calls

The Webhook Calls tab contains all the system-defined HTTP callbacks that have been sent out during a form submission. [VERIFY]

Note: Webhook calls are methods for augmenting or altering the behavior of a web page or web application with custom callbacks.

The Webhook Call categories are as follows:

- **ID**
- **Last**
- **Form Name**
- **Status**
- **Webhook URL**
- **Submission** [button]-click on this button to view user submissions.

ID	Last	Form Name	Status	Webhook URL	Submission
56123		Formulaire sans titre 6	Submitted	No webhook url	
56116		Formulaire sans titre 6	Submitted	No webhook url	
56104		Formulaire sans titre 6	Submitted	No webhook url	
56103		Formulaire sans titre 6	Submitted	No webhook url	
56102		Formulaire sans titre 1	Submitted	No webhook url	
56101		Formulaire sans titre 6	Submitted	No webhook url	
56100		Formulaire sans titre 6	Submitted	No webhook url	
560...		Formulaire sans titre 1	Submitted	No webhook url	
560...		Formulaire sans titre 6	Submitted	No webhook url	
560...		Formulaire sans titre 6	Opened	No webhook url	
560...		Formulaire sans titre 1	Opened	No webhook url	
55958		Formulaire sans titre 6	---	No webhook url	
55957		Formulaire sans titre 6	---	No webhook url	
55956		Formulaire sans titre 6	---	No webhook url	
55955		Formulaire sans titre 6	---	No webhook url	
















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Email Notifications

The Email Notifications tab contains all the email form notices that have been sent out to the patients.

The Webhook Call categories are as follows:

- **ID**
- **Submission Time**
- **Form Name**
- **Subject**
- **Address**
- **Submission** [button]-click on this button to view user submissions.

ID	Submission Time	Form Name	Subject	Address	Submission
56123		Formulaire sans titre 6	No Email Subject	No email adress	
56116		Formulaire sans titre 6	No Email Subject	No email adress	
56104		Formulaire sans titre 6	No Email Subject	No email adress	
56103		Formulaire sans titre 6	No Email Subject	No email adress	
56102		Formulaire sans titre 1	No Email Subject	No email adress	
56101		Formulaire sans titre 6	No Email Subject	No email adress	
56100		Formulaire sans titre 6	No Email Subject	No email adress	
560...		Formulaire sans titre 1	No Email Subject	No email adress	
560...		Formulaire sans titre 1	No Email Subject	No email adress	
560...		Formulaire sans titre 6	No Email Subject	No email adress	
560...		Formulaire sans titre 1	No Email Subject	No email adress	
55958		Formulaire sans titre 6	No Email Subject	No email adress	
55957		Formulaire sans titre 6	No Email Subject	No email adress	
55956		Formulaire sans titre 6	No Email Subject	No email adress	
55955		Formulaire sans titre 6	No Email Subject	No email adress	

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