



Product Brief

# Custom Form Builder

## Become Completely Paperless with This Innovative Tool

**BEHAVIORAL HEALTH HISTORY**

1. Are you currently receiving any behavioral health services from any other provider?  Yes  No  
If yes, where: \_\_\_\_\_ Service type: \_\_\_\_\_

2. Previous behavioral/psychiatric history?  Yes  No  
1) If yes, where: \_\_\_\_\_ Dates of services: \_\_\_\_\_  
Reason for services and outcome: \_\_\_\_\_

2) If yes, where: \_\_\_\_\_ Dates of services: \_\_\_\_\_  
Reason for services and outcome: \_\_\_\_\_

If currently receiving Clinical Home Services, has the agency been contacted?  Yes  No  
(please contact, list specifics): \_\_\_\_\_

Date of last Psychological Assessment: \_\_\_\_\_

**LIVING SITUATION**

1. Where are your living arrangements?  
A.  Living w/ relatives  Homeless  Living in structured care environment  Foster Care  Nursing Home  
 Living by self  Living with friends  Supported Housing/Transitional  Supported Housing /Permanent

Sample Assessment

Date: 7/18/2012 Client: Zippy, John M \* Completed By: \_\_\_\_\_

**BEHAVIORAL HEALTH HISTORY**

Are you currently receiving any behavioral health services from any other provider?  
If yes, indicate where and what services were provided

Previous behavioral/psychiatric history?  
If yes, indicate where and what services were provided

Reason for services and outcome

If currently receiving Clinical Home Services, has the agency been contacted?  
(please contact, list specifics)

**LIVING SITUATION**

\* Where are your living arrangements?

- Living w/ relatives
- Homeless
- Living in structured care environment
- Foster Care
- Nursing Home

\* What is your ownership status?

- Rent
- Own
- Temporary
- Transitional

Ease the transition from paper documents to electronic records!

### Video



View an online demonstration at [ClinicTracker.com/video/FormBuilder](http://ClinicTracker.com/video/FormBuilder)

### The Custom Form Builder makes going paperless simple

Managing paper forms is a headache for everyone in your clinic. They are cumbersome to update, file, track, secure, mail, and audit. But the thought of converting dozens of forms into a digital format is enough to intimidate anyone who is considering purchase of an electronic medical record.

The Custom Form Builder makes the changeover to an EMR pain free. If you have forms different from those in ClinicTracker Connect’s inventory of templates, you can use the Custom Form Builder to create digital versions that capture whatever patient or program information you need. You can even embed a custom form in existing stock forms and include digital signatures from clients or staff.

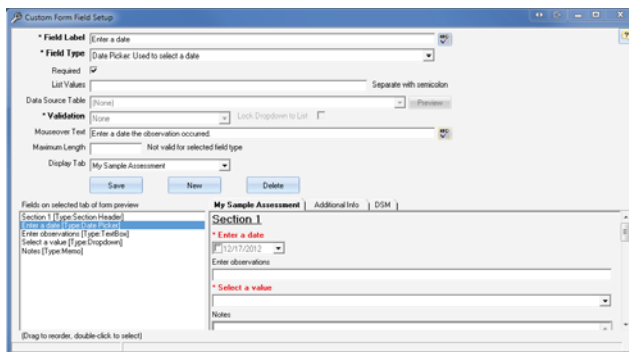
### Custom Form Builder delivers value because it eliminates:

- The cost and hassle of paper forms
- Searching for and misfiling paper case folders
- Security concerns around accessing client information



## Are the forms I create fully integrated into ClinicTracker's data management system?

Any paper document that you convert using the Custom Form Builder becomes fully incorporated into ClinicTracker Connect's system. When a digitized form is completed for a patient, it is linked directly to that patient's chart and can be exported to Microsoft Word for printing, faxing, or emailing. All the data the new form captures are, therefore, fully accessible for tracking and review. In addition, the form itself will look like all the forms pre-stored in ClinicTracker Connect. Users will be completely comfortable working with the forms you create.



## What kinds of forms can I build?

You can create any form you choose. Clinics have created customized HIPAA consent forms, financial policy documents, and specialized intake forms. The capacity to capture digital signatures makes the process especially flexible.

## Create new forms by following a few easy steps:

1. Give the form a name and create as many distinct tabs as you need
2. Decide if it will be standalone, embedded within an existing form, or both
3. Select the fields you want to capture: Choose from drop-down lists, check boxes, list boxes, text fields, section headers, date fields, repeating lists, and more
4. Identify the list values, required fields, and data validations
5. Preview the form in real time as you build it to see the effects of your changes
6. Add or remove fields in your form even after it's been distributed, and ClinicTracker will handle the multiple versions of the form
7. Save the form and begin using it immediately via the paperwork menu

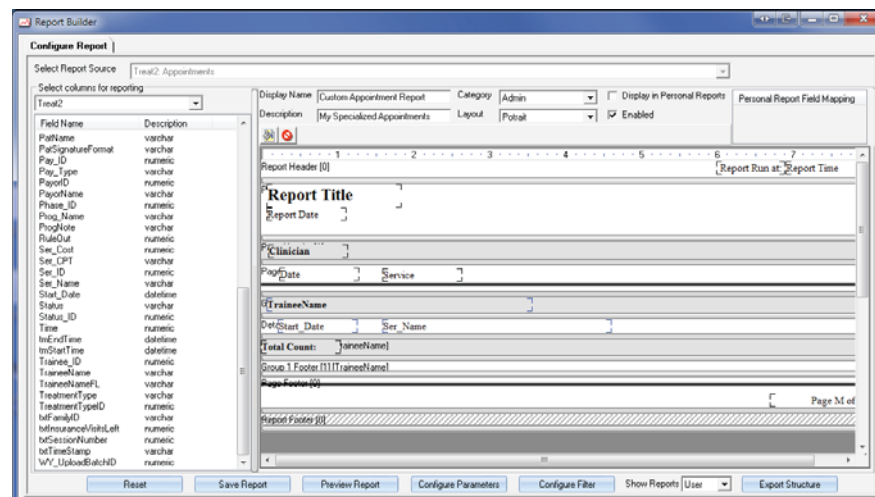
## After the form is created, you can:

- Access it as you would any other form in the system
- Load information from one form to another
- Save new records and access historical records
- Automatically load and update a patient's latest diagnosis
- Preview, print, or export the custom form
- Collect staff, patient, and witness signatures



## Data analysis

The Custom Form Builder is fully integrated with the ClinicTracker Custom Report Builder to deliver instant analysis of any data you've captured with your custom forms. It's as simple as selecting the fields you want to display and dragging them on the reporting canvas. You can run ad-hoc reports, or save them for future access by any of your staff, through ClinicTracker Connect's Standard Reporting module. It's another way that ClinicTracker Connect helps solve your form and report issues with easy to use utilities.



## Document Management

ClinicTracker Connect pairs the Custom Form Builder with the eForms and Report Builder utilities to offer you paperless electronic forms and report creation. Because these systems are integrated with ClinicTracker Connect, you can create staff or patient forms and control the content and design of a report with ease. Adding/tracking new services or managing regulatory changes becomes a simple process – another way ClinicTracker Connect can increase the value and productivity of your practice.

For more information contact us at 315.633.4240 or [hello@ClinicTracker.com](mailto:hello@ClinicTracker.com)