

OneApp Pro Forms Design User Guide

Technical Documentation –Version 5.3

This documentation provides information and instruction regarding forms design in OmniForm as it relates to OneApp Pro. This documentation also includes instructions for using OneApp Pro design elements—including an explanation of how each piece works together to pinpoint the data needed for providers on credentialing applications.

Revised: 07/2010

Chapter 1: Introduction to OmniForm and its Basic Features1

Section 1.1 – OmniForm Overview & Support Disclaimer..... 1

Section 1.2 – Forms: Scanning & Initial Configuration 1

Opening OmniForm1

Scanning Forms1

Saving Forms2

Reordering Pages2

Adjusting the View2

Section 1.3 – OmniForm Toolbars 2

The Design Toolbar2

The Arrange Toolbar3

The Proofing Toolbar3

The Font/Text Toolbar3

The Drawing Toolbar – Design Element Types4

Section 1.4 – OmniForm Limitations 5

OmniForm Field Name Length Limit (50 Characters).....5

OmniForm Page Limit for Forms (100 Pages)5

Unique Field Name Identifiers5

Chapter 2: Mapping Forms in OmniForm6

Section 2.1 – Managing and Placing OmniForm Design Fields 6

Inserting Fields6

Moving or Resizing Fields.....6

Changing Field Names.....6

Section 2.2 – Introduction to OmniForm Fillable Field Types..... 7

Fill Text Fields.....7

Comb Fields.....7

Checkbox Fields.....7

Circle Text Fields7

Section 2.3 – Introduction to the Design Element Clipboard 8

Accessing the Design Element Clipboard8

Documentation Disclaimer: Using the Design Element Clipboard to Map Forms8

Section 2.4 – Mapping OmniForm Fields with OneApp Pro Design Elements..... 8

Selecting a Design Element with the Design Element Clipboard8

Mapping the OmniForm Field in OmniForm9

Unique Field Name Identifiers9

Adding Blank fields.....9

Appendix A: Design Elements Listings10

Appendix Section A.1 – Design Element Parts 10

Section10

Subsection.....10

Record Number10

Field.....11

Format.....11

Appendix Section A.2 –Design Element Sections 12

Default Provider Level Sections12

Other Default Sections.....13

Special Feature Sections13

Premium Module Sections.....14

Appendix Section A.3: Design Element Formats with Examples 15

Address15

Attachment15

Date.....15

Option16

Phone Number16

State16

TriOption16

Appendix B: Advanced OmniForm Design Techniques.17

Appendix Section B.1 – Pre-Filling Values for Fields..... 17

Pre-Filling Text and Comb Fields17

Pre-Filling Circle-Text and Checkbox Fields.....17

Displaying the Current Date on a Form17

Appendix Section B.2 – Other Advanced OmniForm Techniques 17

Design Element Validation.....17

Appendix Section B.3 – Advanced OneApp Techniques..... 18

Adding User Defined Fields to the Design Element Clipboard.....18

Appendix C: OmniForm & OneApp Forms Completion Configuration19

Appendix Section C.1 – OmniForm Initial Configuration 19

Turning Off “Tip of the Day”19

Turning Off “Form Assistant”19

Setting up Scanners to Work With OmniForm.....19

Setting up Toolbars20

Appendix Section C.2 – OneApp Pro Forms Configuration..... 21

Organizing Forms into a Centralized Location21

Configuring the Default Forms Folder21

Chapter 1: Introduction to OmniForm and its Basic Features

Section 1.1 – OmniForm Overview & Support Disclaimer

OmniForm is used to scan any form to be populated by the OneApp Pro database. Once a form has been scanned using OmniForm, saved, and mapped to the OneApp Pro database, it can be populated with provider data.

OmniForm is a 3rd party software application developed by Nuance Communications and used in conjunction with OneApp Pro. Sy.Med Development, Inc. does not distribute, license, nor sell OmniForm to its clients. The following instructions are intended to assist with using OmniForm specifically for use with OneApp Pro. Please consult the OmniForm manual for additional instructions and support.

Section 1.2 – Forms: Scanning & Initial Configuration

This section describes how users would scan in new forms and get OmniForm configured for form design.

Opening OmniForm

To open OmniForm, click Start > Programs > ScanSoft OmniForm 5.0 > OmniForm 5.0

Scanning Forms

1. Place the first page of a form in the scanner bed. If the scanner being used has an Automatic Document Feeder (ADF), then place the entire form in the ADF tray.
2. Click **File > Scan Form** or click the Scan Form button  in the toolbar.
3. Select the **Scanner** Source. *(If scanner is not available, see **Appendix Section C.1** for scanner setup instructions.)*
4. Select **Auto** as the Orientation. When Auto is selected, OmniForm will interpret the orientation of the page and scan accordingly. The orientation may be changed to correct misinterpreted pages.
5. **Important: Uncheck** Convert Form Image to Editable Text.
6. Check **Auto Form Straightening**.
7. Check **Add Page(s) to Current Form** only if scanning multi-page documents without using an ADF. This option is not necessary when scanning page 1. It can also be used for adding addendums to various applications.
8. To scan the next page in the form, when not using an ADF, repeat the steps above. The setting should save automatically.



OneApp Pro 5.3 Design Element & OmniForm User Guide

Saving Forms

Once the form has been completely scanned, it is recommended that the form be saved.

1. Click **File > Save As** and name the form appropriately.
2. Save the form in a subfolder of the default OneApp forms folder along with other credentialing applications*

***Note:** If locating the OneApp Default Forms Location is a problem, see **Appendix Section C.2** for details on how to find it.

Reordering Pages

There is a menu in OmniForm that allows users to reorder a form's pages; this is especially helpful if a new page has been scanned and added after the initial scanning process. Click **Edit > Reorder Pages** to use this feature.

Adjusting the View

If unable to easily view the form on the computer screen, adjust the view using the following steps:

1. Select **View > Zoom**.
2. Choose one of the pre-set Zoom options or enter a custom percentage and then click **OK**.

Note: The view can also be changed by adjusting the percentage from the **Zoom** dropdown  on the menu bar.

Section 1.3 – OmniForm Toolbars

This section describes each toolbar in OmniForm and explains the functions that are commonly used with OneApp Pro forms design.

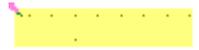
The Design Toolbar

The Design toolbar contains most of the general OmniForm functions. Many of these functions are similar to those in other applications. From left to right this tool bar contains the following command icons:

New, Open, Save | Scan Form, Form Assistant | Print, Print Preview, Spelling | Cut, Copy, Paste |
Zoom | Highlight Fillable Fields | Object Appearance, Object Definition, Size & Position
Calculation, Tools, Help



Highlight Fillable Fields  – This command highlights all of the fillable fields in the form yellow.



Calculation  – This button turns the Calculation toolbar on and off.



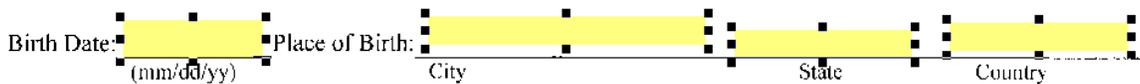
The Arrange Toolbar

The Arrange toolbar contains tools to help align fields with other fields and objects in the form. Multiple fields and/or objects must be selected in the form to use these features. This toolbar will be disabled without two or more fields selected. Users can either click multiple fields while holding down the SHIFT key or use the mouse to draw a box around the fields they wish to select. From left to right, this toolbar has the following command icons: Bring to Front, Send to Back | Align Left, Align Right, Center Horiz. | Align Top, Align Bottom, Center Vertically

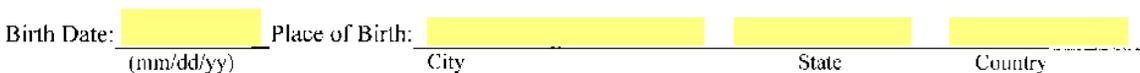


Example: The selected fields below can be aligned using the Align Bottom button. 

Before:

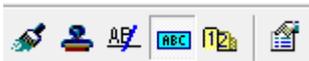


After:



The Proofing Toolbar

This toolbar has many useful options; however, most of them will not be used on a regular basis for forms mapping. For this purpose we will only cover the **Field Name** command icon.



Note: If users are interested in the other features on the proofing toolbar, they can refer to the OmniForm help menu for additional information.

Field Name  – This button toggles the field names on and off. When this button is selected, green labels will appear next to each fillable field. This is convenient when mapping forms because the field name can quickly be changed to one of the OneApp Pro *Design Elements*.* Please note, users will not be able to select or move any fields in the form while this button is turned on. See below for an example:



*More information about OneApp Pro Design Elements can be found in **Chapter 2** of this documentation.

The Font/Text Toolbar

The Font/Text toolbar contains many of the typical options for changing font style, alignment and size. To use this toolbar, select one or more items in the form. This toolbar will be disabled without any fields selected.



The Drawing Toolbar – Design Element Types

The drawing toolbar has a number of commands that prove useful in the form mapping process. This documentation only goes into detail with the command icons that will be used the most during form mapping. This toolbar, by default, appears on the far left side of the OmniForm interface.



Cursor (Select Objects) – This is selected by default and refers to the Windows mouse arrow.

Label, Line, Oval, Rectangle, Graphic – These next five field types do not apply to form design as it relates to OneApp Pro.

Fill Text  – This field type is used for the majority of the fields being mapped in credentialing applications.

Note: For additional Information about the form mapping process, please refer to chapter 2 of this documentation.

Comb  – This field type allows users to fill Comb fields that may appear on electronically scannable forms. These fields require one character per box. The number of boxes for the comb fields can be changed by right-clicking on them and editing their **Object Definition** settings, specifically their **Number of Elements** attribute. The *Design Element Format** for this field type have **Comb** or **C** at the end and deal mainly with formatted numbers (i.e. Phone Numbers, Dates, Zip Codes).

***Note:** Detailed information about OneApp Pro **Design Element Formats** can be found in Appendix Section A.3.

Check Box  – This fillable field type allows users to fill checkboxes as they relate to information in the form. The fill format can be changed by right-clicking and selecting **Object Definition**. In the Object Definition menu select the **Filling** tab and change the value under the **Mark** section.

Circle Text  – This field type allows users to fill circles around text; this is useful, for example, in cases where questions that ask to circle yes or no to answer.

Section 1.4 – OmniForm Limitations

This section describes limitations on various features in OmniForm (i.e. Field Name length limits).

OmniForm Field Name Length Limit (50 Characters)

OmniForm has a set length limitation on field names. It will not allow users to create field names longer than 50 characters.

Note: This limit is not reached with most OneApp design element combinations (Discussed in Chapter 2 and Appendix A). Prior to OneApp Pro 5.3, formats would make extraordinarily long OneApp design elements pass the limit by a few characters. If this is the case, try using a format with a shorter character length; again, this problem was mostly eliminated in OneApp Pro 5.3 where some formats and subsections were shortened in the system.

OmniForm Page Limit for Forms (100 Pages)

OmniForm restricts the number of pages that a form can have. Any form requiring more than 100 pages, should be broken up into multiple forms.

Unique Field Name Identifiers

OmniForm requires that field names be unique. If the exact same field name is needed in other locations on the form, simply add a number at the end of the field name. For example, many forms require the provider’s full name at the top or bottom of each page. The example below shows this but refers to OneApp Pro design elements; these will be covered in more detail in Chapter 2 of this documentation:



Chapter 2: Mapping Forms in OmniForm

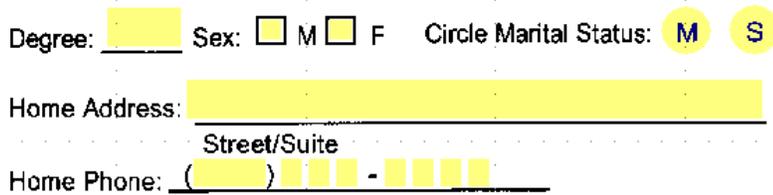
Once all pages of the form have been scanned and the document has been saved, the form mapping process can begin. This section shows the different steps needed in order to perform the mapping process. This is not a step-by-step tutorial but rather a reference guide to assist with form mapping. It is suggested that users undergo forms training for a more detailed and formal walkthrough.

Section 2.1 – Managing and Placing OmniForm Design Fields

The first step to mapping a form, for use with OneApp Pro, is to place fillable fields on the form; each text, checkbox, and circle field being pulled from OneApp should have a fillable field associated with it on the form. This section will discuss putting each type of fillable field into a credentialing application.

Inserting Fields

To insert a new field on the form click the icon associated with the field type that’s needed in the **Drawing Toolbar**. Next, position the Window’s mouse cursor where the new field should appear and left-click to insert the new field. Here is an excerpt from our training form containing a number of different field types.



Degree: Sex: M F Circle Marital Status: M S

Home Address:

Street/Suite

Home Phone: () -

Moving or Resizing Fields

The fields can be moved by selecting and dragging them to the desired location. They can be resized by using the black squares that appear around the field once it has been selected.



Note: If the **Field Name** viewer  in the **Proofing** toolbar is turned on, users will not be able to select, move, resize or in any way, edit the fields in the form except for their field name.

Changing Field Names

Once the field is placed into the form, it is often necessary to change the field names. Click the **Field Name***  button in the Proofing toolbar to turn on the field name labels. Simply click one of the green labels to highlight it, and then delete all of the text inside. Finally, paste or type the desired field name into the label.

Note: If the **Field Name** viewer  in the **Proofing** toolbar is turned on, users will not be able to select, move, resize or, in any way, edit the fields in the form except for their field name.

Section 2.2 – Introduction to OmniForm Fillable Field Types

This section discusses the different fillable field types in OmniForm and how they are used to fill in answers for specific types of questions.

Fill Text Fields

Fill Text  fields are located on the **Drawing Toolbar** and are by far the most commonly used field type in form design, depending on the form. They are used for general alphanumeric data. Most fill in the blank questions will use this field type (i.e. Addresses, Names, Dates, etc...). For example, the screenshot below uses a Fill Text field for the Home Address.

Home Address:

Comb Fields

Comb  fields are used to accommodate fields that require one character per box instead of a Fill Text field. It can also be used to accommodate specific formatting of text as required by the form. Most formatting needs are covered by our built in formats but in some cases comb fields can be used instead. For example, the screenshot below shows the Home Phone number utilizing a comb field for the last 7 digits of the phone number, (A Fill text is used for the area code.)

Home Phone: () -

Checkbox Fields

Checkbox  fields, also located in the **Drawing Toolbar** in **OmniForm**, are used to fill option type questions from OneApp (i.e. Gender, Marital Status, Yes/No, True/False, etc...). For example, the screenshot below uses checkboxes to select a provider's gender.

Sex: M F

Circle Text Fields

Circle Text  fields are also used to fill option type questions from OneApp (i.e. Gender, Marital Status, Yes/No, True/False, etc...). Depending on the format of the option type question in the form, one or the other is necessary. For example, the screenshot below uses Circle Text fields to indicate the provider's Marital Status.

Circle Marital Status: M S

Section 2.3 – Introduction to the Design Element Clipboard

The OneApp Pro Design Element Clipboard should be the primary source for selecting design elements for the form mapping process. This tool in OneApp’s **Tools** menu and allows users to construct the design element they need through its selection process. The selected item is copied and can be pasted in the appropriate field name on forms in OmniForm. These design elements drill down into the data to pinpoint the information needed from OneApp to put into the field in a credentialing application for a given provider.

Accessing the Design Element Clipboard

In OneApp Pro select the **Tools** option from the Main Menu; then click **Design Element Clipboard**.

Documentation Disclaimer: Using the Design Element Clipboard to Map Forms

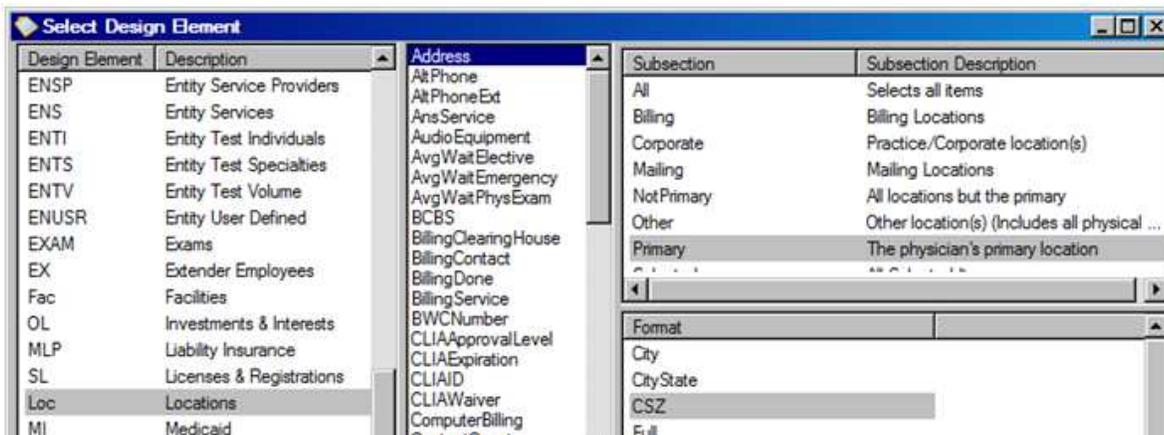
The remainder of this documentation assumes that users are using the **Design Element Clipboard** in **OneApp Pro** to select design elements. We are also going to assume that the **Convert Form Image to Editable Text** checkbox was unchecked when the form was scanned into OmniForm.

Section 2.4 – Mapping OmniForm Fields with OneApp Pro Design Elements

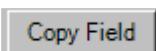
This section takes users step-by-step in mapping an OmniForm Field using the Design Element Clipboard to select the desired element.

Selecting a Design Element with the Design Element Clipboard

This section describes each part of a design element and how to select one for use in a form. For the purposes of this section, let’s use the, **Loc_Primary_1_Address_CSZ**, as an example. There are four parts to the Design Element Clipboard. Three of these parts require a selection in order to copy the design element. The fourth part, **Format**, is only required if it is applicable to the Design Element type that’s selected. The example below shows the selections needed for the Primary Office Address using the CSZ format.



Once a selection is made, click the **Copy Field*** button on the bottom the Design Element Clipboard, to the right.



*Clicking this button copies the desired design element into the Microsoft Windows clipboard; it works exactly like the **Copy** feature in Windows when trying to “Copy & Paste” something from one place to another. The next step is to map the form field with the OneApp design element.

Mapping the OmniForm Field in OmniForm

After selecting the desired field from OneApp's Design Element Clipboard, switch back over to OmniForm and click the **Field Name**  button in the Proofing toolbar to turn on the field name labels; Click the green label next to the field that is going to be used for this design element to highlight all of the text inside. Then paste the design element from the Design Element Clipboard over the existing text. (Pasting can be done by using the **Ctrl+V** key combination on the computer keyboard or by right-clicking the highlighted text and selecting **Paste**).

Reminder: Clicking the Copy Field in the Design Element Clipboard copies that design element to the Windows Clipboard ready to paste into the field name for one of the OmniForm fields. After pasting the design element into the field, the only parts of the name that may need to be changed are the range number or adding a unique identifier at the end of the field name.

Repeat this process of selecting a Design Element from the Design Element Clipboard and pasting it in the field names of their associated OmniForm Field. Once all of the design elements are in place, the form is mapped. Please check the appendices of this document for additional information regarding design elements and other useful information.

Unique Field Name Identifiers

OmniForm requires that field names be unique. If the exact same field name is needed in other locations on the form, simply add a number to the end of the OneApp Design Element to make this field name unique. Be sure to avoid using the same number twice. For example, many forms require the provider's full name at the top or bottom of each page. The example below shows The OneApp Pro design element for a physician's last name; it has the number 1 at the end because this design element has been used previously in the form.

Phy_All_1_LastName1

Name: 

Last

Adding Blank fields

Once all of the fields are mapped, in the OmniForm document, that have an associated OneApp design element, some fields will be left over. There will likely be some fields on the form that won't have a built-in OneApp Pro field and/or design element. For now, just place blank fields here as place-holders to manually fill in the data after each form completion. As the data in OneApp Pro is developed over-time, user-defined fields can be added to accommodate any fields in the forms that do not have a built-in OneApp Pro field. These user-defined fields can be created on many of the screens themselves or in the User Defined screen for providers, offices, and practices. If they are created on the screens themselves, a design element is automatically generated. User-defined fields created in the User Defined screens require design elements to be created through a manual process; see **Appendix Section B.3** under the sub-heading, **Adding User Defined Fields to The Design Element Clipboard** for more details.

Additionally, some data (Today's Date, Checkboxes and Circle text values, Text values, etc...) can be programmed to automatically generate into the form field using the **Calculation** feature of OmniForm. For details on how to do this, see **Appendix Section B.4** for details. These fields should have generic names, such as FillText1, CheckBox1, CircleText1, or Comb1 so they do not conflict with OneApp Pro design Elements. The numbers increment depending on how many times the fields are used. See below for an example of a generic Fill Text field:

FillText214



Appendix A: Design Elements Listings

This appendix provides a listing of many of the design element sections formats, and more that are delivered with OneApp Pro.

Appendix Section A.1 – Design Element Parts

This section describes each part of a design element. For the purposes of this section, let's use the, **Loc_Primary_1_Address_CSZ**, as an example.

There are five pieces to OneApp Pro Design Elements. The fifth piece, **Format**, is only required if it is applicable to the Design Element type that is selected; otherwise, without a format, the design element only has 4 pieces. See the explanations below for each design element piece and how they are used to pinpoint the exact information needed from OneApp.

Section – The first column in the Design Element Clipboard. Sections refer to the general location in the program where the information is stored in OneApp—this usually refers to a specific OneApp screen or Database Table. A full listing of design element sections is provided in **Appendix Sections A.2** of this documentation.

In example used here, **Loc** is the section abbreviation for locations, which refers to the **Office Locations** screen in OneApp Pro. Sometimes sections will refer to more than one related screens, but is very rare.

Subsection – The top of the third column in the Design Element Clipboard. Subsections refer to a specific selection of the selected data; they are designed to exclude records that are not relevant to the users' specific needs.

In our example, **Primary** is the subsection and refers to the **Primary Office Location** as indicated by the primary checkbox in the **Office Locations** screen. This will only look for offices with that Primary checkbox checked. This would exclude all offices except for the Primary Office Location from the data selection.

Note: The **All** subsection is present for all sections and selects all of the records associated with that section/field combination. In this example, **all** may select the primary office but could also select another office that the selected provider is located in.

Record Number – There is not a place for this in the Design Element Clipboard; this part of the design element defaults to **1** and can be manually configured when put into the field name label on the OmniForm Document.

In our example **1** refers to the first record from the results that are pulled for that design element. Incrementing this number would refer to subsequent records that may or may not be present in the results that are pulled for that design element. For some design elements, in the case of a Primary Office Location for example, only one result is pulled and incrementing this number would result in a blank record since the provider only has one result.

OneApp Pro 5.3 Design Element & OmniForm User Guide

Field – The second, or center, column in the Design Element clipboard. This part refers to the field in OneApp Pro containing the data needed in the form. There is typically a design element field for every field in every screen in OneApp Pro; some exceptions may apply; that is, a small number of fields in OneApp Pro may not have design elements associated with them.

In our example **Address** refers to the address for the **(Primary) Office Location Address**. Typically this is the last piece displayed in the design element; the only time there would be something after this part is if a Design Element Format is necessary.

Note: If the same design element is used more than once in a form, a number may follow the design element to make the field name unique in OmniForm. See the **Unique Field Name Identifiers** heading in **Section 2.5** of this documentation for more details.

Format – This is the bottom of the third column in the Design Element Clipboard. This part of the design element allows formatting options for certain types of fields. It is only required for five types of fields, **Address, Date, Phone Number, Option, TriOption**. A full listing of design element Formats is provided in **Appendix Section A.3** of this documentation.

Appendix Section A.2 –Design Element Sections

This Appendix Section lists all of the Design Element Sections in OneApp Pro, their associated screen, and other related information for each screen.

Default Provider Level Sections

This is a list of Design Element sections associated with the **Provider** that come with OneApp Pro and are not associated with OneApp Pro Premium or Special Features.

| Screen/Section Name | Section |
|--------------------------------|---------|
| Board Certifications | SP |
| Checklist | CL |
| Claims & Complaints | MPC |
| Continuing Education | CME |
| Covering Providers | RP |
| DEA & CDS Registrations | DEA |
| Disciplinary Actions | Sac |
| Documents (Provider) | DOC |
| Education | ED |
| Emergency Contacts | EMRG |
| Exams | EXAM |
| Extender Employees | EX |
| Facilities | Fac |
| *Health Status | Phy |
| Investments & Interests | OL |
| Liability Insurance | MLP |
| Licenses & Registrations | SL |
| Locations (Office Locations) | Loc |
| Medicaid | MI |
| Military Service | MExp |
| Payers | PAY |
| Personal Demographics | Phy |
| Professional Affiliations | PA |
| Provider Attestation Questions | PAT |
| Publications & Presentations | PUB |
| References | PRef |
| Services | SER |
| Taxonomy | TAX |
| User Defined (Provider) | USR |
| Work History | WH |

*Some screens may have their design elements located in with the design elements for another screen. This is sometimes the case when screens are small, contain very little data and can be tied to another screen with similar information.

OneApp Pro 5.3 Design Element & OmniForm User Guide

Other Default Sections

This section lists OneApp Pro design element sections that are associated with Offices, Practices, Facilities, and Facility Provider levels of the tree. This section only shows sections associated with screens that come with OneApp Pro and are not associated with OneApp Pro Premium or Special Features.

| Screen/Section Name | Section |
|-------------------------------|---------|
| Documents (Office) | DOCO |
| Documents (Practice) | DOCP |
| Documents (Facility Provider) | DOCFP |
| Statistics (Practice) | PS |
| Site Visits (Practice) | SV |
| Taxonomy Practice (Practice) | TAXP |
| User Defined (Office) | OUSR |
| User Defined (Practice) | PUSR |

Special Feature Sections

This section does not apply to all clients; this lists sections that may have been created for special features used by some of our clients. Some, or all, of these may not apply to most users.

| Screen/Section Name | Section | Associated Project |
|-----------------------------------|---------|---------------------------------------|
| ApplySmart Identification Numbers | ASID | Minnesota Credentialing Collaborative |
| ApplySmart Licenses | ASLIC | Minnesota Credentialing Collaborative |
| ApplySmart Work Gaps | ASGAP | Minnesota Credentialing Collaborative |

OneApp Pro 5.3 Design Element & OmniForm User Guide

Premium Module Sections

These OneApp Pro Design Element Sections are associated with various premium features. The NotiPhy, OneApp Facility, NPDB, Verification, and Privileging modules require an additional fee. They may, or may not, have been purchased with the the initial purchase of OneApp Pro. Check in the **About** section of the OneApp's Help menu for specific client licensing details. For more information about these and other premium modules, including purchasing, please contact our support department.

| Screen/Section Name | Section | Tree Level | Module |
|--------------------------------|---------|-------------------------------------|-----------------|
| Alert Email Fields | Alert | N/A | NotiPhy |
| NPDB | NPDB | Provider | NPDB |
| Privileging | PRV | Facility/Provider | Privileging |
| Verification | VER | Provider | Verification |
| Entity Accreditation | ENAC | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Attestation Questions | ENAT | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Bed Count (Beds Bottom) | ENBC | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Beds (Beds Top Grid) | ENBD | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Billing | ENBL | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Contacts | ENCT | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity DEA Numbers | ENDEA | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Demographics | ENDM | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Details | ENDT | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Disciplinary Action | ENDA | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Equipment | ENEQ | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Fines | ENFI | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Investments | ENIV | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Laboratory Services | ENLS | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Lease | ENLE | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Liability Insurance | ENLI | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Licenses | ENLC | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Malpractice Claims | ENMC | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Medicaid | ENMI | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Officers | ENOF | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Offsite | ENOS | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Ownership | ENOW | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Payers | ENPAY | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Radiology Services | ENRS | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Service Providers | ENSP | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Services | ENS | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Test Individuals | ENTI | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Test Specialties | ENTS | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity Test Volume | ENTV | Entity (Practice, Office, Facility) | OneApp Facility |
| Entity User Defined | ENUSR | Entity (Practice, Office, Facility) | OneApp Facility |

Appendix Section A.3: Design Element Formats with Examples

Address – The Address formats allow OneApp to break addresses into different parts to fit the formatting requested by a form. The following Formats are associated with the address field type:

| Format | Description | Example |
|-----------|---------------------------------------|--|
| City | city | New York |
| CityState | city and state | New York, NY |
| CSZ | city, state, and zip | New York, NY 12345-6789 |
| Full | street, suite, city, state, zip | 100 8th Ave. Apt C, New York, NY 12345-6789 |
| NameFull | name, street, suite, city, state, zip | ABC, Inc. 100 8th Ave. Apt C, New York, NY 12345 |
| State | state | NY |
| Street | street | 100 8th Ave. |
| StrSuite | street and suite | 100 8th Ave. Apt C |
| Suite | suite | Apt C |
| Zip | zip | 12345-6789 |
| ZipComb | zip comb | 1 2 3 4 5 6 7 8 9 |

Attachment – This format is to facilitate document attachments on form. This corresponds to a feature in 5.3 where documents can be generated and printed with enrollment application.

| Format | Description | Example |
|--------|------------------------------|---------|
| Attach | Document or Email Attachment | N/A |

Date – The date formats allow OneApp to format or break up dates into different parts to fit the formatting requested by a form. The following formats are associated with the Date field type:

| Format | Description | Example |
|--------|---------------------------------------|-----------------|
| DD | 2-Digit Day | 22 |
| MDY2C | 2-Digit Month, Day, and Year Comb | 1 0 2 2 9 5 |
| MDY4C | 2-Digit Month, Day, 4-Digit Year Comb | 1 0 2 2 1 9 9 5 |
| MM | 2-Digit Month | 10 |
| MMDDYY | 2-Digit Month, Day, and Year | 10/22/95 |
| MMYY | 2-Digit Month and Year | Oct-95 |
| MMYYYY | 2-Digit Month, 4-Digit Year | 10/1995 |
| MY2C | 2-Digit Month and Year Comb | 1 0 9 5 |
| MY4C | 2-Digit Month, 4-Digit Year Comb | 1 0 1 9 9 5 |
| Short | Full Date (MM/DD/YYYY) | 10/22/1995 |
| YY | 2-Digit Year | 95 |
| YYYY | 4-Digit Year | 1995 |

OneApp Pro 5.3 Design Element & OmniForm User Guide

Option – The Option formats allow OneApp to format certain single checkboxes, yes/no, and other field types where two options are available that equate to Yes/No or True/False. These formats are used to format option type design elements different ways to meet the formatting requirements requested by the form. The following formats are associated with the Option field type:

| Format | Description | Example |
|--------|------------------------------|---------|
| ChkN | check if no | X |
| ChkY | check if yes | X |
| CirN | circle if no | O |
| CirY | circle if yes | O |
| TF | T if true, F if false | T |
| TrFa | True if true, False if false | TRUE |
| YesNo | Yes if yes, No if no | Yes |
| YN | Y if yes, N if no | Y |

Phone Number – The phone number formats allow OneApp to format phone numbers into different parts to fit the formatting requested by the form. The following formats are associated with the Phone Number field type:

| Format | Description | Example |
|--------|------------------------------------|---------------------|
| AC | area code | 888 |
| ACComb | area code comb | 8 8 8 |
| Local | local (no area code) | 796-3388 |
| LocalC | local (no area code) comb | 7 9 6 3 3 8 8 |
| Long | area code + local | 888-796-3388 |
| LongC | area code + local comb | 8 8 8 7 9 6 3 3 8 8 |
| Parens | area code (in parentheses) + local | (888) 796-3388 |

State – This format was added in 5.3 and allows OneApp to apply different formats to the state design elements throughout the program. The following formats are associated with the State field type:

| Format | Description | Example |
|---------|---------------------------------|-----------|
| StLng | Non-Abbreviated State | Tennessee |
| StShort | Abbreviated State (U.S. Postal) | TN |

TriOption – The TriOption formats allow OneApp to format certain yes/no/Not-Applicable and other field types where three options are available that equate to Yes/No/Not-Applicable. These formats are used to format TriOption type design elements different ways to meet the formatting requirements requested by the form. The following formats are associated with the TriOption field type:

| Format | Description | Example |
|--------------|-------------|---------|
| TriCheckNA | NA value | X |
| TriCheckNo | No value | X |
| TriCheckYes | Yes value | X |
| TriCircleNA | NA value | O |
| TriCircleNo | No value | O |
| TriCircleYes | Yes value | O |

Appendix B: Advanced OmniForm Design Techniques.

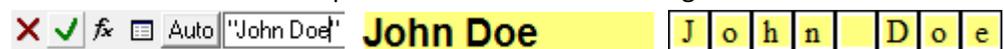
This chapter covers some advanced techniques that seasoned OneApp Pro and OmniForm users might find a need for. These techniques will not likely be needed for basic form design.

Appendix Section B.1 – Pre-Filling Values for Fields

OmniForm’s calculation function can also be used to display permanent values for fields that will have the exact same value every time the form is completed. Use generic names for these fields so that OneApp doesn’t try to overwrite them with information. First, turn on the Calculation field on by clicking *Tools > Calculation*. Then, click on the field that needs to pre-filled and click into the blank calculation field. Use the instructions below and continue for the field type being filled.

Pre-Filling Text and Comb Fields

Place the “desired text” in quotation marks and click the green check mark in the calculation toolbar.



Pre-Filling Circle-Text and Checkbox Fields

Place the number 1 without any other text in the calculation field and click the green check mark in the calculation toolbar. In the examples below, the circle text field for Female and the second checkbox had a calculated value of 1 which causes them to be circled or checked respectively every time a form is filled from OneApp.



Displaying the Current Date on a Form

OmniForm’s calculation function can also be used to display the current date in the field. First, turn on the Calculation field on by clicking *Tools > Calculation*. Then, click on the field where the date should be filled. In the calculation field, type `Date()` and click the green check mark in the calculation toolbar. When form is completed, this field will display the current date.



Appendix Section B.2 – Other Advanced OmniForm Techniques

This section discusses advanced techniques that may be needed when designing forms in OmniForm.

Design Element Validation

OmniForm fields can be validated to make sure that the completed form isn’t printed with important fields that are blank but need to be filled. To require that a specific field be filled, right-click on the desired field and choose **Object Definition**; then select the Validation tab and check the checkbox next to **Must be Filled in**. Before the form can be closed or printed, OmniForm will display a warning if the validated field is empty. This can be done for as many fields as needed in a form, but OmniForm will generate a different validation message for each individual field that is blank.

OneApp Pro 5.3 Design Element & OmniForm User Guide
Appendix Section B.3 – Advanced OneApp Techniques

This section covers advanced techniques related to OneApp Pro that may be needed with form design.

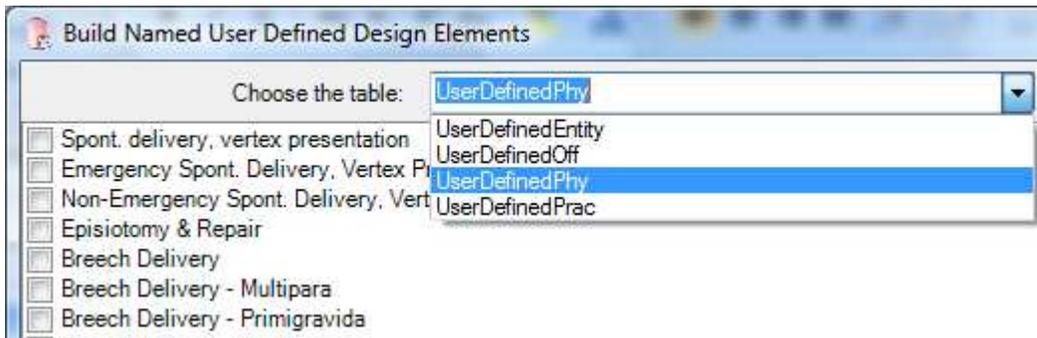
Adding User Defined Fields to the Design Element Clipboard

Access the **Design Element Editor** in OneApp by clicking **Configure > Design Elements**. The following steps will guide users through accessing the information to use in forms design:

1. Select the appropriate User Defined section from the section list on the left. See chart below for descriptions:

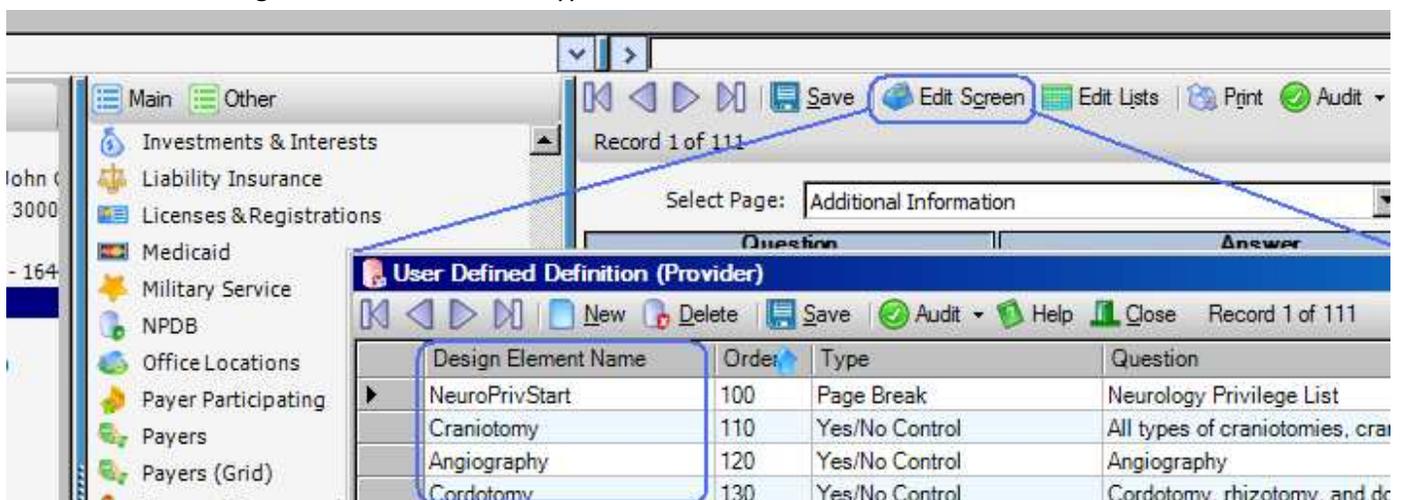
| Section Name | Description | Associated Table |
|--------------|--|-------------------|
| USR | User Defined Section for Providers | UserDefinedPhy |
| OUSR | User Defined Section For Offices | UserDefinedOff |
| PUSR | User Defined Section For Practices | UserDefinedPrac |
| ENUSR | User Defined Section For Entities (Practice, Office, Facility) | UserDefinedEntity |

2. Click the User **Defined Field Wizard** button at the top in the Design Element Editor’s **Action Toolbar**.
3. Select the appropriate table (See chart Above) to add design elements from:



A list of questions from the selected section will appear. Be sure to only select the new records that need to be added to the Design Element Clipboard. Selecting a question that has already been added to the Design Element Clipboard will result in a duplicated field name. Once selections have been made, click **OK**. The design elements for the questions that were selected will now be available in the design element clipboard for use with Forms Mapping.

Important Note: Before selecting any of these items in the checklist, verify that appropriate values are entered for the Design Element Name, in the User Defined Definitions screen, for the items needed. Do not enter a Design Element Name for Page Break and Line Break type User Defined Definitions.

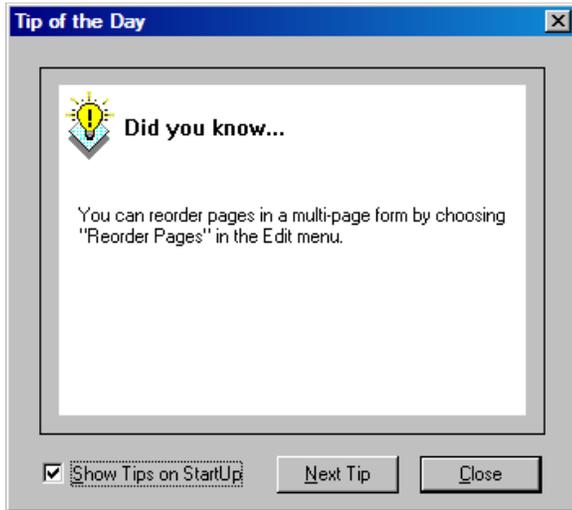


Appendix Section C.1 – OmniForm Initial Configuration

This section describes how to configure OmniForm for use with OneApp Pro forms.

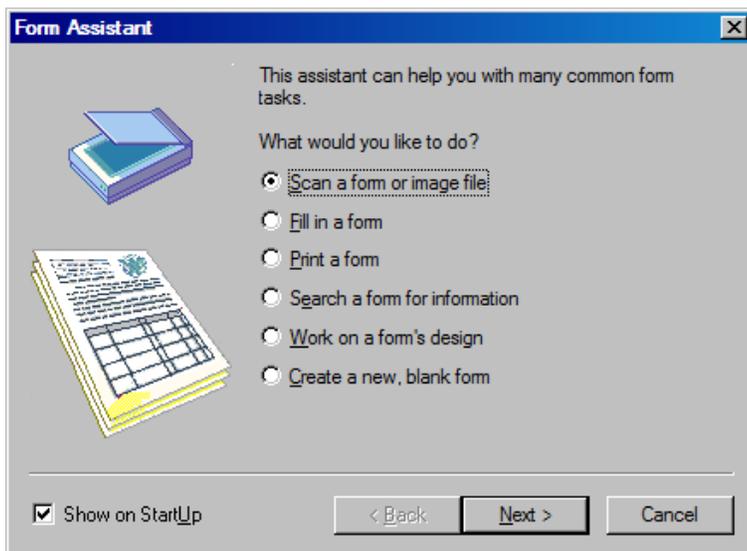
Turning Off “Tip of the Day”

When OmniForm first loads, the **Tip of the Day** screen comes up. This is rarely helpful is often an annoyance when opening OmniForm since it will come up every time OmniForm is opened unless turned off. To turn this off, simply uncheck the box next to **Show Tips on StartUp** and click **Close**.



Turning Off “Form Assistant”

When OmniForm first loads, in addition to the Tip of the Day, the **Form Assistant** comes up. Again, this is rarely helpful especially when using OmniForm to manage forms for OneApp Pro. This will come up every time OmniForm is loaded unless it is turned off. To turn this feature off, uncheck the checkbox to the left of **Show on StartUp** and click **Cancel**.



Setting up Scanners to Work With OmniForm

OneApp Pro 5.3 Design Element & OmniForm User Guide

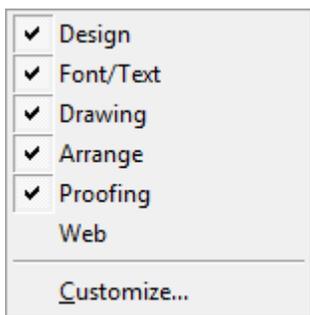
OmniForm 5.x is compatible with a variety of scanner types and brands. To check a scanner's compatibility with OmniForm, go to <http://support.nuance.com/compatibility/>. In our experience, most TWAIN compatible scanners that are not listed in this list will probably work with OmniForm 5.x.

OmniForm behaves differently with different scanners, drivers, and native scanning interface combinations. The OmniForm user's manual or your IT staff for help configuring the scanner to work with OmniForm. To select a scanner, click **File > Select Scanner**. If the scanner is properly connected to the computer, the appropriate scanner TWAIN driver should come up. Go through the wizard to test and configure the scanner appropriately.

Setting up Toolbars

Most of the toolbars will be needed for the form design process. Use the following steps to enable the needed toolbars.

1. With the **Form Designer** tab selected, click the **View > Toolbars** menu.
2. Ensure that the following toolbars are checked:

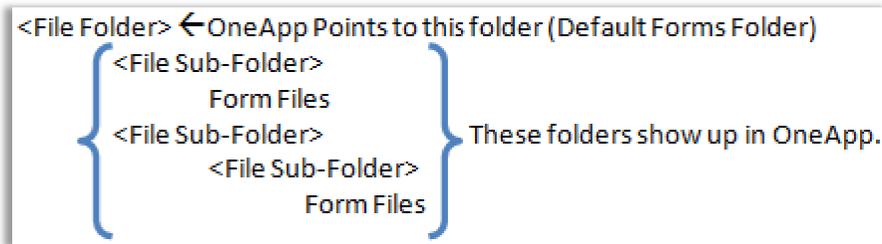


Appendix Section C.2 – OneApp Pro Forms Configuration

This section describes any initial setup required in OneApp Pro in order to use the Forms Completion feature.

Organizing Forms into a Centralized Location

OneApp Pro requires that all forms, being used with the Form Completion feature, be organized into one centralized location. Although there are many methods as to how those forms are organized in this location, there are a few basics that need to be covered. OneApp Pro has a feature that allows users to point it to one starting folder, this folder should contain only sub-folders; those sub-folders would contain the forms needed in OneApp. Forms or files located directly in the directory that OneApp points to will not be accessible in OneApp. See the sample structure below for example:



Configuring the Default Forms Folder

To configure OneApp to point to a Default Form location, use the following steps:

1. Log into OneApp as an Administrative User.
2. Click **Configure > Forms** and then select the **Change Directory** option from the Action Toolbar.
3. Select the folder that contains the form folders and click **OK**.

