penelope

case management software

DOCUMENT BUILDING

v4.0 and up

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documents: the basics

ABOUT DOCUMENTS

Documents are custom templates that you can create to track data about clients, staff members, and Blue Book contacts. The Documents feature also enables you to transform your paper-based forms into an electronic format to help simplify data collection and reporting. You may create as many Documents as you like, each containing as many questions as you like, and can be modified as your data collection needs evolve.

You can create custom Documents and associate them with any level of the system (i.e. Service File, Service Event, Group, Funder, Individual, Case, etc.). You can also create Service or Program-specific Documents that only appear for applicable programs. Staff members can then complete these Documents at the assigned level.

The Documents can include as many questions as you like. You can set up your Document to include a variety of different questions whose answers can be captured as long-form text responses, selections from a drop-down list, multiple-choice responses, etc.

VIEW THE LIST OF EXISTING DOCUMENTS

Depending on your security settings, you may be able to view the full list of existing Documents. The Documents List includes both active and inactive Documents marked by a green or red radio button respectively.

1. On the homepage expand the **Setup** section.
2. Click **Document List**.
3. If required, in the **Search Criteria** section, choose criteria to narrow the search results.
4. Click **Go**.

TYPES OF DOCUMENTS

There are four different types of Documents (or classes) to choose from: form, letter, outcomes assessment, and survey.

Document class	Description	Suggested use case(s)
Form	Forms are the most comprehensive and flexible Document type. Forms can include the features of Outcomes Assessments (i.e. scores, staging, etc.), but they aren't restricted to being filled out at the Service File or Service Event level. Forms cannot, however, be graphically represented like an Outcomes Assessment.	Risk assessments Supplemental intake forms Contact log Service plan
Letter	A letter Document can be used to create letters to send to clients, funders, Blue Book entries, etc. or to attach to a client's record (for example, a signed consent form). When creating your letter, you can include data fields and data lists to pre-populate the letter with data from the client's	Appointment reminders Referral letters Consent forms

file. You can also include a series of questions for users to fill out and populate the variable components of the letter with. Finally, you can customize the formatting and layout of the letter.

Letters can be assigned to any Class so that they can be filled out at various levels in the system, but they cannot use pages, scored questions, or stages.

Outcomes Assessment	Outcomes Assessments are very similar to Forms but also allow you to track change over time and are only available at the Service File level. Outcomes Assessments automatically include stages for tracking change over time; they include one initial and closing stage respectively and can have one or more progress stages. You can view the progress of a client's responses in a graphical format within their Service File in the Assessments tab.	Treatment plans Goal planning Health assessments
Survey	Surveys are most useful for tracking change over time for simpler point-based questions (for example, satisfaction on a scale of 1-10). They automatically include stages, but they can only include one initial, progress, and close stage each. Surveys are mostly commonly used for Documents completed at the Individual Profile, Case, and Anonymous Service levels.	Client satisfaction surveys Staff evaluations Presentation surveys

DOCUMENT STYLES

Styles affect the appearance of your Document. You can apply a single style to an entire Document, or you can mix and match styles throughout individual sections of the Document.

Document style	Example
Boxed	

Lined

Add Document

Document
Case Manager Quarterly Visit Note
Document Date 10/09/2014
For Individual Smith, Bawa
Document Description

Case Manager Quarterly Visit Note

Patient Name:	Bawa Smith	MID number:	
Date of Visit	mm/dd/yyyy	Time Ended	
Time Started		Total Minutes	

cancel   back   update   next   finish

Minimal

Add Document

Document
Case Manager Quarterly Visit Note
Document Date 10/09/2014
For Individual Smith, Bawa
Document Description

Case Manager Quarterly Visit Note

Patient Name:	Bawa Smith	MID number:	
Date of Visit	mm/dd/yyyy	Time Ended	
Time Started		Total Minutes	

cancel   back   update   next   finish

Shaded

Add Document

Document
Case Manager Quarterly Visit Note
Document Date 10/09/2014
For Individual Smith, Bawa
Document Description

Case Manager Quarterly Visit Note

Patient Name:	Bawa Smith	MID number:	
Date of Visit	mm/dd/yyyy	Time Ended	
Time Started		Total Minutes	

cancel   back   update   next   finish

creating new documents

PROCESS FLOW: CREATING A NEW DOCUMENT

1. Create the Document
2. Assign the Document to a Class and, if applicable, a Case Service
3. Customize the Document
   a. Create one or more scores if applicable
   b. Add elements as required to customize the Document
   c. Add signatures if applicable
   d. If you're creating a Letter Document, customize the layout
4. Preview the Document
5. Add Action Triggers if applicable
6. Finalize the Document

NEW DOCUMENT SETTINGS

There are a number of customization options when setting up a new Document:

Option	Description
Title	The title is name of the Document and what staff members will see when selecting which new Document to fill out for a client. The title is a required field.
Short Title	The short title is a shortened version or abbreviation of the Document title and is used behind the scenes for reporting purposes. The short title is a required field.
Class	Class refers to the type of Document that you are creating. There are four Document classes or types available: Form, Letter, Outcomes Assessment, or Survey. For more information about Document classes, view the Types of Documents topic.
Completed for	You use this drop-down list to indicate whom the finished Document will be filled out for: an individual (client), a worker (staff member), or a Blue Book entry. Note: Outcomes Assessments can only be completed for an Individual (Individual will automatically be selected).
Document Style	You use this drop-down list to indicate which style (Shaded, Boxed, Lined, or Minimal) your Document will have. The Document Style affects how your Document appears when printed out. Pages and sections within the Document can inherit the main Document style or have their own style.
Use Pages	Use this option to separate your Document across multiple pages. Enabling pages means that users will be required to click "next" when filling out the Document to move on to the next page. This option is particularly useful for longer Documents as it allows the person

completing the Document to save their work as they go automatically. Note: If you select the Use Pages option, you cannot deactivate it later.

Description	You have the option of including a description of the Document that you're creating.

CREATE A NEW DOCUMENT

1. On the homepage expand the **Setup** section.
2. Click **Document List**.
3. In the **Results** section, click **Add New Document**.
4. In the **Title** field, type the name of the Document.
5. In the **Short Title** field, type an abbreviation of the Document title.
6. In the **Class** section, choose the type of Document.
7. If you have enabled the Engage feature, to make the Document accessible for clients to complete, click the **Client Facing** option.
8. In the **Completed for** drop-down list, choose whom the Document will be created for.
9. In the **Document Style** drop-down list, choose the visual style of the Document.
10. If necessary, click the **Use Pages** option.
11. If necessary, in the **Description** field, type a description for the Document.
12. Click **Save**.

After you finish: Customize the questions and layout of the new Document as required.

CREATE A NEW DOCUMENT BASED ON AN EXISTING DOCUMENT

You can create a new Document based on an existing Document. When you create a copy of a Document, you create another occurrence of the Document; i.e. two unique Documents become available in the Documents or Outcomes Assessments sidebar. The new Document will include the same layout and questions as the original Document, which can then be modified as needed. If you have multiple new Documents to create that are very similar, it may be more efficient to create one Document that can serve as a template or basis for the remaining Documents.

1. View the Document that you would like to use as the template for your new Document.
2. In the Document, click **Copy Document**.
3. In the **Title** field, update the title of the Document as required.
4. In the **Short Title** field, update the short title of the Document as required.
5. In the **Class** section, choose the type of Document.
6. In the **Completed for** drop-down list, choose whom the Document will be created for.
7. In the **Document Style** drop-down list, choose the visual style of the Document.
8. Click **Save**.

After you finish: Customize the questions and layout of the new Document as required.

Note: When you copy a Document, the questions in the Document are considered shared by default. To make changes to the questions (for example, changing the text of a question), you must delete and re-add the question.

assigning documents to classes and services

ABOUT ASSIGNING DOCUMENTS TO CLASSES AND SERVICES

You can specify where a Document is available to be completed. You can choose one or more levels in Penelope; for example, Individual, Service File, Case, Group Event, Funder, Indirect Event, etc. If you assign a Document to be available at the Service File or Service File Event level, you also have the option of specifying which Case Service the Document is applicable to.

ASSIGN A CLASS TO A DOCUMENT

You can specify where a Document is available to be completed. You can choose one or more levels in Penelope; for example, Individual, Service File, Case, Group Event, Funder, Indirect Event, etc.

1. In the Document, expand the **Assigned Classes** sidebar.
1. In the **Assigned Classes** sidebar, click **Add.**
2. In the **Class Entity** list, complete one of the following options:
    a. To select all available classes, click **Select All**.
    b. To select specific classes, click the checkbox next to the class name.
3. Click **Save**.

ASSIGN A CASE SERVICE TO A DOCUMENT

If you assign a Document to be available at the Service File or Service File Event level, you also have the option of specifying which Case Service the Document is applicable to.

1. In the Document, expand the **Case Services** sidebar.
2. In the **Case Services** sidebar, click **Add.**
3. In the **Service Name** list, complete one of the following options:
    a. To select all available services, click **Select All**.
    b. To select specific services, click the checkbox next to the service name.
4. Click **Save**.

REMOVE AN ASSIGNED CLASS FROM A DOCUMENT

1. In the Document, expand the **Assigned Classes** sidebar.
2. In the **Assigned Classes** sidebar, click the ⊖ icon next to the class that you want to remove.

REMOVE AN ASSIGNED CASE SERVICE FROM A DOCUMENT

1. In the Document, expand the **Case Services** sidebar.
2. In the **Case Services** sidebar, click the ⊖ icon next to the service that you want to remove.

customizing documents

SCORES

ABOUT SCORES

The Scores feature enables you to create scores and associate them with questions to record assessment-type tracking in a Document. The score itself can be set to calculate the sum or the average of the user's response to the scored questions in the Document. Further, you can create classifications to show a rating or significance to a range of results. If you are going to include scored questions in your Document, we recommend creating the score(s) first to avoid having to convert standard questions to scored questions.

Documents can include one or more scores. You can also create a summary score that incorporates and tallies multiple sub-scores in the Document. Scores are unique to the Document that you create them in; you cannot use the same score across multiple Documents. If you copy a Document that includes a score, you must create a new score and associate the score with the required questions.

The following types of questions can be created as scored questions: Numbers, Dates, and Lists. When you create a new question, you can choose to create a "New Scored Question" and associate the question directly with a score. You can also customize the weight of the question by adjusting the operator (i.e. add, divide, exponent, multiply, or divide) and the weight value. Scored questions require responses, but the questions automatically include a "required with n/a" option allowing responders to select "n/a" if the question does not apply to them. By choosing "n/a," the score of the question acts as a "0" value and therefore does not count towards the overall score.

SCORE OPTIONS

Section	Setting	Description
Un	Class	**Question Scores** are scores associated with specific questions and are used to calculate responses to those questions.
		Summary Scores are used to total sets of Question Scores.
	Calculation	**Average** totals all of the scored question response values and divides that total by the number of scores included.
		Sum totals the scored question response values.
	No Response Limit	You can specify the number of questions associated with the score that can be left unanswered by the responder while still allowing a score to be calculated.
	Threshold	You can specify a numerical value to indicate a standard or normal score. The threshold acts as an indicator if the responder is above or below the standard value.

Statistic	Mean	You can specify a numerical value to indicate the expected or anticipated average score.
	Standard Deviation	The amount of variation from the average (mean) score.
	Show ZScore	The raw score to be standardized minus the mean of the population over the standard deviation of the population. The ZScore indicates how many standardized deviations above or below the mean the score is (i.e. a way of standardizing or normalizing the data).
Comment		A rich text field where you can include comments about the score to staff members. Any text included in the comments will only be accessible by editing the Document and not when a staff member fills out the Document.

ADD A SCORE

1. In the Document, expand the **Scores** sidebar.
2. Click **Add**.
3. In the **Score Name** field, type a name for the score.
4. From the **Class** drop-down menu, select the appropriate score class.
5. From the **Calculation** drop-down menu, select how the score should be calculated.
6. If required, in the **No Response Limit** field, type the number of questions that can be left unanswered.
7. If required, in the **Threshold** field, type the threshold value.
8. If required, in the **Mean** field, type the mean value.
9. If required, in the **Standard Deviation** field, type the standard deviation value.
10. If required, select the **Show ZScore** option.
11. If required, in the **Comment** field, type a description for the score.
12. Click **Save**.

ADD A TOTAL SCORE CLASSIFICATION

Total Score classifications enable you to attach a rating or significance to a range of results. For example, you could say that a total score in the range of 10-20 is "moderate". You can assign a name to your Total Score range (for example, Mild, Moderate, and Severe), an "Up To" limit (for example, 10, 20, 0, -10), and text that will accompany that result).

If you create a classification value of 10, the limit will initially show as "0 to 10.00" in the Total Score box. If you then create another classification value of 20, the limit will show as "Greater than 10.00 to 20.00". If you then create a classification value of 0, the limit will show as "Equals to 0," and your original "0 to 10.00" range will now show as "Greater than 0 to 10.00".

1. Locate the Score that you want to add a classification to.
2. In the **Component** section, click the **Classification** tab.
3. In the **Total Score** section, click **Add**.
4. In the **Name** field, type a name for the classification.

5. In the **Up To** field, type the numerical value of the classification limit.
6. In the **Comment** field, type any text that will accompany the result.
7. Click **Save**.

ADD A CHANGE IN SCORE CLASSIFICATION

The Change in Scores classification allows you to attach a rating to a range of score changes. For example, if a Document is filled out for a client multiple times, the client's score will change over that time. Change in Score classifications allow you to attach significance to those changes; for example, a change of 0 to 5 might be moderate, a change of -10 to -5 might be severe, etc.

You can include a Change in Score classification for Outcomes Assessments and Surveys.

1. Locate the Score that you want to add a classification to.
2. In the **Component** section, click the **Classification** tab.
3. In the **Change In Scores** section, click **Add**.
4. In the **Name** field, type a name for the classification.
5. In the **Up To** field, type the numerical value of the classification limit.
6. In the **Comment** field, type any text that will accompany the result.
7. Click **Save**.

CONVERT A QUESTION TO A SCORED QUESTION

You can convert standard questions to scored questions after they have been created. The following types of questions can be converted to scored questions: Numbers, Dates, and Lists. If you are converting a question to a scored question, the question can no longer include the "Use Other" option and the question will now be "Required with n/a" by default. Converting a question to a scored question is an irreversible action.

Prerequisite: If you are converting a List-based question to a scored question, the List-based question must employ a scored list. For more information about ensuring your List-based question includes a scored list, see the Convert a list to a scored list topic.

1. Locate the question that you want to convert to a scored question.
2. To the right of the question, expand the **Show Detail** option.
3. Click **Add Score**.
4. Click the **Convert Question** option.
5. From the **Score** drop-down list, select which score the question should be added to.
6. If applicable, click the **Reverse Scale** option.
7. From the **Weight Operator** drop-down list, select which operator you'd like to use.
8. In the **Weight Value** field, type the weight value for the question.
9. Click **Save**.

ADD AN EXISTING SCORED QUESTION TO THE SCORE QUESTION LIST

You can add existing scored questions to the Score's question list through one of two ways: from Question List within the score (best for adding multiple questions to list successively) or from the "Show Detail" option for the question.

Prerequisite: To add a question to the Question List of a score, the question must be a scored question type. You can convert existing standard questions to scored questions if needed.

Option 1: From the Question List

8. In the Document, expand the **Scores** sidebar.
9. In the **Score Name** list, click the name of the score whose Question List you want to edit.
10. Click the **Questions** tab.
11. In the **Questions List** section, click **Add**.
12. From the **Question** drop-down, select which question you want to add.
13. From the **Weight Operator** drop-down list, select which operator you'd like to use.
14. In the **Weight Value** field, type the weight value for the question.
15. Click **Save**.

Option 2: From "Show Detail"

1. Locate the question that you want add to a score.
2. To the right of the question, expand the **Show Detail** option.
3. Click **Add Score**.
4. From the **Score** drop-down list, select which Score the question should be added to.
5. If applicable, click the **Reverse Scale** option.
6. From the **Weight Operator** drop-down list, select which operator you'd like to use.
7. In the **Weight Value** field, type the weight value for the question.
8. Click **Save**.

REMOVE A QUESTION FROM THE SCORE QUESTION LIST

You can remove scored questions from the Score's question list through one of two ways: from Question List within the score (best for removing questions from the list successively) or from the "Show Detail" option for the question.

Option 1: From the Question List

1. In the Document, expand the **Scores** sidebar.
2. In the **Score Name** list, click the name of the score whose Question List you want to edit.
3. Click the **Questions** tab.
4. In the **Questions List**, next to the name of the question, click the click the ⊖ icon.
5. Click **Okay**.
6. Repeat steps 4-5 for each remaining question you want to delete.

Option 2: From "Show Detail"

1. Locate the question that you want remove from the Score's question list.
2. To the right of the question, expand the **Show Detail** option.
3. Next to the name of the Score, click the click the ⊖ icon.
4. Click **Okay**.

ADD A SUB-SCORE TO THE SUB-SCORE LIST

1. In the Document, expand the **Scores** sidebar.

2. In the **Score Name** list, click the name of the summary score whose Sub-score List you want to edit.
3. Click the **Sub-Scores** tab.
4. In the **Sub-score List**, click **Add**.
5. Complete one of the following options:
    a. To add all scores to the Sub-Score list, click **Select All**.
    b. To add individual scores to the Sub-Score list, in the **Score Name** list, select the scores.
6. Click **Save**.

UPDATE A SCORE

1. In the Document, expand the **Scores** sidebar.
2. In the **Score Name** list, click the name of the score you want to edit.
3. Click **Edit**.
4. Make changes to the score as required.
5. Click **Save**.

DELETE A QUESTION SCORE

You cannot delete a question score that is associated with a question; you must remove all questions from the Question List before deleting the score. You also cannot delete a question score that has been used in a completed Document.

1. In the Document, expand the **Scores** sidebar.
2. Complete one of the following options:
    a. If there are no questions associated with the score, in the **Score Name** list, next to the score that you want to remove, click the ⊖ icon.
    b. If there are questions associated with the score, proceed to Step 3.
3. In the **Score Name** list, click the name of the score you want to delete.
4. In the **Component** section, click the **Questions** tab.
5. In the **Questions List**, next to the name of the question, click the click the ⊖ icon. Repeat for each remaining question.
6. Click **Delete**.
7. Click **Okay**.

DELETE A SUMMARY SCORE

You cannot delete a summary score that is associated with a sub-score; you must remove all sub-scores from the Sub-Scores List before deleting the summary score. You also cannot delete a summary score that has been used in a completed Document.

1. In the Document, expand the **Scores** sidebar.
2. Complete one of the following options:
    a. If there are no sub-scores associated with the score, in the **Score Name** list, next to the summary score that you want to remove, click the ⊖ icon.
    b. If there are questions associated with the score, proceed to Step 3.
3. In the **Score Name** list, click the name of the score you want to delete.
4. In the **Component** section, click the **Sub-Scores** tab.

5. In the **Sub-Scores List**, next to the name of the score, click the click the ⊖ icon. Repeat for each remaining score.
6. Click **Delete**.
7. Click **Okay**.

ELEMENTS

ELEMENTS CLASSES

Elements are the items that you use to populate your Document; they include sections, questions, groups, and composite questions.

Element	Description
Section	Sections are used as a mechanism for organizing similar questions together. For example, you may have several questions related to a client's social history, their health history, and their current mental status that should be organized into individual sections. Sections can be added to the Main Body, a page, and other sections.
Questions	Questions make up the majority of your Document. They can be created to pull information from other areas of Penelope through data lists and data fields or they can server as a mechanism for collecting new information. Questions can be added to the Main Body, a page, sections, groups, and composite questions. For a full list of available question types, see the Question Types topic.
Group	Group questions are used to group a series of questions together in a table-style format. For example, you may have a series of mental health questions that you'd like a client to rate on a scale of 1-5. Group questions can be added to the Main Body, a page, and sections. You can include one or a mix of different question types. Group questions that are composed only of number-based questions will automatically total for you in a completed Document.
Composite question	Composite questions allow you to create a set of questions across the same horizontal line and allow the responder to answer the set of questions as many times as applicable. In a composite question, you create a key question (or first question) and the remaining question titles are shown as column headers. For example, you may have a series of questions related to goal planning for a client, and the client may have more than one goal to Document. A composite question will allow the client to respond to the questions as many times as need. Composite questions can be added to the Main Body, a page, sections, and groups. You can include multiple question types (for example, text, drop-down, date, etc. questions).
Pages	Pages are used to separate your Document across multiple pages. Enabling pages means that users will be required to click "next" when filling out the Document to move

on to the next page. This option is particularly useful for longer Documents as it allows the person completing the Document to save their work as they go automatically. Note: If you select the Use Pages option, you cannot deactivate it later.

ABOUT FLOATING ELEMENTS

Floating an element allows you to position multiple sub-sections, groups, or composite questions next to each other in a Document. When you float an element, you can set the width (i.e. how much horizontal space you want the element to take up on the screen or page).

In the example below, you can see two sub-sections that have been set to float at 50% width each.

You are not technically limited to having two elements side-by-side on the page, though aesthetically, we recommend floating no more than three elements next to each other.

REORDER AN ELEMENT

1. In the element that you want to reorder, click **Reorder**.
2. In the **Elements in Page** list, complete the following actions as required.
   a. To move an element up, next to the element, click ▲.
   b. To move an element down, next to the element, click▼.
3. Click **Save**.

MOVE AN ELEMENT

1. In the element that you want to move, click **Move**.
2. In the **Move Into** list, click the element you want to move the current element into.
3. Click **Save**.

REMOVE AN ELEMENT

1. Complete one of the following actions:
   a. To remove a Section, Group, or Composite question, next to the element, click **Remove**.
   b. To remove a question, click **Show Detail** > **Remove**.
2. Click **Okay**.

SECTIONS

Sections are used as a mechanism for organizing similar questions together. Sections can be added to the Main Body, a page, and other sections.

SECTION OPTIONS

Section	Setting	Description
General	Name	The Name is the text that is displayed in the setup section of the Document to identify the question. The Name does not appear in the printed Document.
	Float Element	Floating an element allows you to position multiple sub-sections, groups, or composite questions next to each other in a Document.
Numbering	Number Section	If checked, the section title will be numbered.
	Sub Element Format	You can choose to number any sub elements included in the section. The drop-down list includes formatting options.
		Customization options include:
		Tier Numbering: This option combines the main element and sub element numbers. For example, 1.1, 1.2, 2.1, etc.
		Continuous Numbering: This option will number questions in a continuous sequence regardless of whether the questions are included in the same or different sections.
Displayed Text	Title	The Title is the text that will appear in a printed Document. A title is not required.
	Style	The style drop-down allows you to specify unique formatting for the section. By default, the section will inherit the style selected for the main Document.
	Header	Any text that you include in the header field will appear before the questions that you add to the section.

| Footer | Any text that you include in the footer field will appear after the questions that you add to the section. |

ADD A SECTION

Sections are used as a mechanism for organizing similar questions together. Sections can be added to the Main Body, a Page, and other sections.

1. In the Document, complete one of the following options:
   a. To add a section from the **Main Body** or a **Page**, click **Add Element**.
   b. To add a section within another section, click **Add**.
2. From the **Class** drop-down list, click **Section**.
3. In the **Name** field, type a name for the section.
4. To float the section, click **Float Element**. In the **Width** field, specify the percentage of horizontal space you want the section to occupy.
5. To number the section, in the **Numbering** section, click the **Number Section** option.
6. To specify the formatting of the section, in the **Numbering** section, expand the **Sub Element Format** drop-down list. Select a format.
7. To include a displayed title for the section, in the **Displayed Text** section, in the **Title** field, type a title.
8. To specify the style of the section, complete one of the following options:
   a. To use the same style as the main Document, in the **Style** drop-down list, click **Inherit**.
   b. To use a different style than the main Document, in the **Style** drop-down list, select one of the other available styles.
9. If required, in the **Header** section, type the header text.
10. If required, in the **Footer** section, type the footer text.
11. Click **Save**.

After you finish: Add another section, add a group, add a composite question, or add a question.

QUESTIONS

Questions can be added to the Main Body, a page, sections, groups, and composite questions. If your Document includes scoring, you can optionally create new scored questions for Number, Date, and List questions.

QUESTION TYPES

The table below provides information about each of the available question types including formatting options and customization options available for the specific question type.

Type	Format options		Description
Number	Integers	##0	**Use case**: For questions where the response is a number. For example, a dollar value, weight, the number of times a client has experienced an issue, etc.
	Currency	$###.##	
	Percentage	###%	

	Point scale		Number-based questions require a numerical input to respond to the question. For currency and percentage questions, responders are only required to type a numerical value into the response field as formatting for response is automatically included in the finished Document.
	Separated	###,##.##	
	Slider		
	Spinner input		
			Depending on the format that you select, you can specify the **decimal place**. For example, to format a number that appears as "10.55," set the decimal place to 2.
Text	Short text	Interviewer:	**Use case**: For questions where the response is a text-based answer.
	Rich text	Reason for clinical risk assessment: 	The **short text** option provides a small text field and is designed for capturing short text responses from the responder (though there is no limitation to the number of characters that you can type in the short text box). The **rich text** option provides a large text field with formatting capabilities and is designed to capture long text responses from the responder.
Yes/No	Yes Check Box	Did you serve in the Military? ☐	**Use case**: For questions where the response is a yes or no. For example, if a client has experimented with drugs or alcohol in the past 6 months.
	Yes/No Radio	Are you over age 65? ◯ Yes ◯ No	For **Yes Check Box** questions, clicking the box indicates "yes," and leaving the box unchecked indicates "no." Yes/No questions are automatically required questions, but you can choose to include "n/a" as a response option.
Date	Date input	Date: yyyy/mm/dd 📅	**Use case**: For questions where the response is a date. For example, the date of the client's last medical examination.
	Date input with age in years	Date: yyyy/mm/dd 📅	For the **Date input with age in days** format, the age in days is calculated (after the Document is finished) based on the Document date and the date entered in the date field.
	Date input with age in days	Date: yyyy/mm/dd 📅	

For the **Date input with age in years**, the age in years is calculated (after the Document is finished) based on the Document date and the date entered in the date field.

			Use case
List	Check box list	Colors ☐ Blue ☐ Red ☐ Green ☐ Yellow	**Use case**: For questions where the response is selected from a pre-defined list of options.
	Drop-down	Colors [⬍]	You can choose to include a new list of response options or you can select an existing list of responses from the **Shared List Group**.
	Radio list	Colors ◯ Blue ◯ Red ◯ Green ◯ Yellow	
	Suggested lookup	Colors [ ]	You can specify to **Use Other, which** will include an additional "Other" option in list.
			For check box list questions, you can choose to only show the selected responses in a completed Document by selecting the **Show Only Selected** option.
User			**Use case**: For questions where the response is a worker's name.
			The response field is a suggested lookup and pulls from a list of active workers in your Penelope database.
Service	Check box list		**Use case**: For questions where the response is one or more services (Case Services, Informal Services, and Anonymous Services) provided by your agency.
	Drop-down		
	Radio list		
			The Service question option displays a list of all active Services as the response options. Depending on the format that you select, the responder can choose one or more list options.
Case Service	Check box list		**Use case**: For questions where the response is one or more Case Services provided by your agency. For example, if you want to specify the Case Service that you recommend for the client as a result of completing a supplemental Intake Document.
	Drop-down		
	Radio list		

		The Case Service question option displays a list of active Case Services as the response options. Depending on the format that you select, the responder can choose one or more list options.
Comment		**Use case**: To create a comment between questions. Comments can be used to provide additional information to the person completing the Document, context for upcoming questions, etc.
Data Field		**Use case**: For questions where you want to populate the response automatically based on single-field data that is already captured elsewhere in Penelope. For example, if you record a client's ethnicity on their Individual Profile, you can automatically populate the response with that data. Data Field questions pull the data live from Penelope regardless of what state the Document is in (i.e. unlocked or locked). For example, if you include a data field question for a client's date of birth, the field will automatically update to the current date of birth as of the day you view the already completed Document; i.e. if you need to capture the client's static date of birth, you should consider using the Date question type.
Data List		**Use case**: For questions where you want to populate the response automatically based on list-based data that is already captured elsewhere in Penelope. For example, a list of Collateral Contacts. Data List questions pull the data live from Penelope regardless of what state the Document is in (i.e. unlocked or locked).
Site	Drop-down Suggested lookup	**Use case**: For questions where the response is one of the sites of operation at your agency.

QUESTION RESPONSE OPTIONS

Depending on the question type that you select, you can customize the following response options:

Option	Description
Question answer	You can specify whether or not responding to a question is optional or required. Depending on the question type, the Question Answer drop-down list may include the following options: **Optional**: The responder does not have to provide an answer to continue completing the Document. **Required**: The responder must provide an answer to the question to continue completing the Document. **Required with n/a**: The responder must provide an answer to the question but is given an additional option of "n/a".
Default	You can specify a default answer for a question. Depending on the question type that you select, the way you set the default response may vary. For example, to set a default response to a text-based question, you would type the default text whereas to set a default response to a yes/no-based question, you would select the yes, no, or no default radio button.
Lower limit	For number-based questions, you can specify the lower limit or the minimum numerical value that a responder can indicate.
Upper limit	For number-based questions, you can specify the upper limit or the maximum numerical value that a responder can indicate.

QUESTION DISPLAYED TEXT OPTIONS

Depending on the question type that you are adding to your Document, you may be able to customize the following display options:

Option	Description
Number question	If checked, the question will be numbered.
Inline question	If checked, the response area will be displayed inline or next to the question. If unchecked, the response area will be displayed directly below the question. Note: this formatting option is not available for Rich Text questions.
Comment type	You can add a text/comment box after a question to provide the responder an additional space to type information about their response. You can choose to include a short text (for short responses) or rich text (for long responses) comment type.

Comment label	If you include a comment type, you can also specify a comment label. The comment label can serve as a way to provide additional information or context to the responder for the type of information they should include in the comment.
Abbreviation	The abbreviation option allows you to specify an abbreviated version of a question name for use with composite questions. The abbreviated text will appear as the question name when the question is included within the composite question type but not for other question types. This option is particularly useful if you are including a shared question within a composite and the standard question name is quite long.
Help text	You can include helper text or an explanation of the question that will appear when the responder mouses over the question.
Lower end point text	For slider number-based questions, you can specify text that appears at the lower end point of the slider. For example: unsatisfied, unhappy, low, etc.
Upper end point text	For slider number-based questions, you can specify text that appears at the upper end point of the slider. For example: very satisfied, happy, high, etc.

NEW QUESTIONS

ADD A NEW NUMBER QUESTION

Number questions are used for questions where the response is a numerical value; for example, a dollar value, weight, or the number of times a client has experienced an issue, etc. If your Document includes scoring, you can optionally create new scored Number question.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question** or **New Scored Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Number**.
3. From the **Question Format** drop-down list, select the desired number format.
4. To allow for decimals, in the **Decimal Place** field, specify how many decimal places to include.
5. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.
2. If required, in the **Default** field, type a default response.
3. If required, in the **Lower Limit** field, specify the minimum numerical response value.
4. If required, in the **Upper Limit** field, specify the maximum numerical response value.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.
6. If you are creating a slider number question, in the **Lower End Point Text** and **Upper End Point Text** fields, optionally type text that appears at the upper end point of the slider.

Step 5: Customize score information (if applicable)

1. From the **Score** drop-down list, select which score you'd like to apply to the question.
2. From the **Weight Operator** drop-down list, select which operator you'd like to use.
3. In the **Weight Value** field, type the weight value for the question.

Step 6: Save the question.

1. Click **Save**.

ADD A NEW TEXT QUESTION

For questions where the response is a text-based answer.

Step 1: Create the question

1. Complete one of the following options:
     a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
     b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Text**.
3. From the **Question Format** drop-down list, select the desired text format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.
2. If required, in the **Default** field, specify a default response.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option. **Note**: This option is not available for Rich Text questions.
3. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
4. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW YES/NO QUESTION

Yes/No questions are used for questions where the response is a yes or no. For example, if a client has experimented with drugs or alcohol issue in the past 6 months.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Yes/No**.
3. From the **Question Format** drop-down list, select the desired yes/no format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.
2. If required, in the **Default** field, select a default option.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW DATE QUESTION

Date questions are used for questions where the response is a date. If your Document includes scoring, you can optionally create new scored Date question.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question** or **New Scored Question**..

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Date**.
3. From the **Question Format** drop-down list, select the desired date format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.
2. If required, in the **Default** field, specify the default date.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Customize score information (if applicable)

1. From the **Score** drop-down list, select which score you'd like to apply to the question.
2. From the **Weight Operator** drop-down list, select which operator you'd like to use.
3. In the **Weight Value** field, type the weight value for the question.

Step 6: Save the question.

1. Click **Save**.

ADD A NEW LIST QUESTION

List questions are for questions where the response is selected from a pre-defined list of options. If your Document includes scoring, you can optionally create a new scored List question.

Step 1: Create the question

1. Complete one of the following options:
     a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
     b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question** or **New Scored Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **List**.
3. In the **List Group** section, complete one of the following options:
     a. To create a new list, click the **New List** option.
     b. To use an existing list that has been shared, click the **Shared List** option. From the **Shared List Group** drop-down list, select the desired list.
4. From the **Question Format** drop-down list, select the desired list format.

5. To include the term "Other" as an optional value in the list, click the **Use Other** option.
6. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Customize score information (if applicable)

1. From the **Score** drop-down list, select which score you'd like to apply to the question.
2. If applicable, to reverse the normal scoring scale for the question, select the **Reverse Scale** option.
3. From the **Weight Operator** drop-down list, select which operator you'd like to use.
4. In the **Weight Value** field, type the weight value for the question.

Step 6: Save the question.

2. Click **Save**.

After you finish: If you elected to include a New List, you will need to create the list.

ADD A NEW USER QUESTION

User questions are used for questions where the response is a worker's name.

Step 1: Create the question

1. Complete one of the following options:
   a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
   b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **User**.
3. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.

3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW SERVICE QUESTION

Service questions are used for questions where the response is one or more services (Case Services, Informal Services, and Anonymous Services) provided by your agency.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Service**.
3. From the **Question Format** drop-down list, select the desired Service list format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW CASE SERVICE QUESTION

Case Service questions are used for questions where the response is one or more Case Services provided by your agency. For example, if you want to specify the Case Service that you recommend for the client as a result of completing a supplemental Intake Document.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Case Service**.
3. From the **Question Format** drop-down list, select the desired Case Service list format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW COMMENT QUESTION

Comment questions are used to create a comment between questions.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the comment.
2. From the **Question Type** drop-down list, click **Comment**.
3. To share the question for future use, click the **Share Question** option.

Step 3: Save the question.

1. Click **Save**.

ADD A NEW DATA FIELD QUESTION

Data field questions are used for questions where you want to populate the response automatically based on single-field data that is already captured elsewhere in Penelope. For example, if you record a client's ethnicity on their Individual Profile, you can automatically populate the response with that data.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Data Field**.
3. To share the question for future use, click the **Share Question** option.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. If required, in the **Help Text** field, type an explanation for the question.
4. From the **Data** drop-down list, select the data source.
5. From the **Data Field** drop-down list, select the specific data field you want to reference.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW DATA LIST QUESTION

Data list questions are used for questions where you want to populate the response automatically based on list-based data that is already captured elsewhere in Penelope; for example, a list of Collateral Contacts.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Data List**.
3. To share the question for future use, click the **Share Question** option.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.

2. If required, in the **Help Text** field, type an explanation for the question.
3. From the **Data** drop-down list, select the data source.
4. From the **Data Field** drop-down list, select the specific data list you want to reference.

Step 5: Save the question.

1. Click **Save**.

ADD A NEW SITE QUESTION

Site questions are used for questions where the response is one of the sites of operation at your agency.

Step 1: Create the question

1. Complete one of the following options:
    a. To add a question from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a question within another element, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **New Question**.

Step 2: Customize new question information

1. In the **Name** field, type the question.
2. From the **Question Type** drop-down list, click **Site**.
3. From the **Question Format** drop-down list, select the desired Site list format.
4. To share the question for future use, click the **Share Question** option.

Step 3: Customize response information

1. From the **Question Answer** drop-down menu, select a response requirement.

Step 4: Customize displayed text information

1. To apply numbering to the question, click the **Number Question** option.
2. To locate the response area next to the question, click the **Inline Question** option.
3. To include a text field for additional comments after the response, from the **Comment Type** drop-down list, select a comment type. If required, in the **Comment Label** field, type instruction text.
4. If required for a composite question, in the **Abbreviation** field, type an abbreviation.
5. If required, in the **Help Text** field, type an explanation for the question.

Step 5: Save the question.

1. Click **Save**.

SHARED QUESTIONS

SHARE A QUESTION

You can share questions that you create to use in other Documents. If you share a question, it will appear the same for every Document that you use it in. Further, if you make a change to the question, the change will affect all Documents that use the question.

When you create a new question, you have the option to share the question for future use. You can also choose to share a question after it has been created.

1. Locate the question that you want to share.
2. Click the question name.
3. Click the **Share Question** option.
4. Click **Save**.

ADD A SHARED QUESTION

You can add shared questions to your Document. Questions can be added to the Main Body, a page, sections, groups, and composite questions.

1. Complete one of the following options:
   a. To add a section from the **Main Body** or a **Page**, click **Add Element**.
   b. To add a section within another section, click **Add**.
2. From the **Class** drop-down list, click **Question**.
3. In the **Add** section, click **Shared Question**.
4. In the **Question** field, type the name of the question you want to use. Note: the name of the question corresponds exactly with the value typed in the Name field.
5. Complete one of the following options:
   a. To select the question from the suggested lookup list, click the question.
   b. To view the full list of shared questions, click **Show All** then select the question.
6. Click **Save**.

LISTS

CREATE A NEW LIST

Step 1: Edit the list settings

1. Next to your list question name, click **New List**.
2. In the **New List** page, click **Edit**.
3. In the **Name** field, type a name for the list. Note: If you are going to share the list for future use, we recommend including an easily identifiable name for the list.
4. To share the list, click the **Share List** option.
5. To determine the sorting of the list, in the **Sort List By** section, select a sorting method.
6. In the **Number of Columns** field, specify how many columns you'd like to appear.
7. If required, click the **Score List** option.
8. Click **Save**.

Step 2: Create the list values

1. In the **Active Values** section, click **Add**.
2. In the **Name** field, type the value.
3. To set the value as the default response, click **Make Default**.
4. Click **Save**.
5. Repeat steps 1-4 as required.

SHARE A LIST

You can share lists that you create for use in other Documents. If you share a list, it will appear the same for every Document that you use it in. Further, if you make a change to the list, the change will affect all Documents that use the question.

Sharing lists is particularly useful for group questions that require you to answer several questions from the same list of values; for example, if you have 10 questions that require responses on a scale like: very likely, likely, somewhat likely, unlikely, very unlikely. This scenario requires that you create the list once for the first question and then use a shared list for all remaining questions.

1. Click the list.
2. In the **Question List Group** page, click **Edit**.
3. In the **Name** field, type a name for the list.
4. Click the **Share List** option.
5. Click **Save**.

CONVERT A LIST TO A SCORED LIST

You can convert lists to scored lists after they have been created. Converting a list to a scored list is an irreversible action.

1. Locate the list that you want to edit.
2. Click the list name.
3. Click **Edit**.
4. Click the **Score List** option.
5. Click **Save**.

CONDITIONS

ABOUT CONDITIONS

There are two types of conditions available: standard conditions and flagged conditions. Standard conditions enable you to affect other elements in the Document based on how a question is answered; you can hide, show, collapse, expand, grey-out, or disable greyed-out for other questions, entire sections, groups, or composite questions. Flagged conditions enable you to prompt users to do something after a Document is completed. You can also create Document-based Action Triggers based on flagged questions to initiate additional processes.

Conditions can include one or more criteria, and you can choose to apply the condition when any criteria are met or when all criteria are met. The criteria itself can be no response (i.e. when the question is not answered) or a specific response which requires that you set the specified response. After configuring the condition, you can set up the applicable elements.

ADD A STANDARD CONDITION

Standard conditions enable you to affect other elements in the Document based on how a question is answered; you can hide, show, collapse, expand, grey-out, or disable greyed-out for other questions, entire sections, groups, or composite questions.

Step 1: Create the condition

1. Locate the question that you want to add a condition to.
2. Next to the question, click **Show Detail**.
3. Click **Add Condition**.
4. In the **Name** field, type a name for the condition.
5. In the **Rule** section, select a criteria option.
6. In the **Criterion** section, in the **Answer** section, select a response type.
7. If you selected the **Specific response** option, complete the following actions:
    a. From the **Operator** drop-down list, select an operator.
    b. From the **Response** drop-down list, select a response.
8. Click **Save**.

Step 2: If necessary, create additional criteria

1. In the **Criteria** section, click **Add**.
2. In the **Criterion** section, in the **Answer** section, select a response type.
3. If you selected the **Specific response** option, complete the following actions:
    a. From the **Operator** drop-down list, select an operator.
    b. From the **Response** drop-down list, select a response.
4. Click **Save**.
5. Repeat steps 1-4 as necessary.

Step 3: Select applied elements

1. In the **Applied Elements** section, click **Add**.
2. In the **Action** section, select the type of action to take.
3. In the **Apply on** section, select which element you want to affect.
4. Click **Save**.
5. Repeat steps 1-4 as necessary.

ADD A FLAGGED CONDITION

Flagged conditions enable you to prompt users to do something after a Document is completed. You can also create Document-based Action Triggers based on flagged questions to initiate additional processes.

Step 1: Create the condition

1. Locate the question that you want to add a condition to.
2. Next to the question, click **Show Detail**.
3. Click **Add Condition**.
4. In the **Name** field, type a name for the condition.
5. Click the **Flag** option.
6. In the **Rule** section, select a criteria option.
7. If you have chosen to flag the condition, in the **Flag Condition** section, complete the following options:
    a. In the **Note** field, type the flag note.
    b. In the **When evaluated to true** section, select a flag option.
8. In the **Criterion** section, in the **Answer** section, select a response type.
9. If you selected the **Specific response** option, complete the following actions:
    a. From the **Operator** drop-down list, select an operator.
    b. From the **Response** drop-down list, select a response.

10. Click **Save**.

Step 2: If necessary, create additional criteria

1. In the **Criteria** section, click **Add**.
2. In the **Criterion** section, in the **Answer** section, select a response type.
3. If you selected the **Specific response** option, complete the following actions:
   a. From the **Operator** drop-down list, select an operator.
   b. From the **Response** drop-down list, select a response.
4. Click **Save**.
5. Repeat steps 1-4 as necessary.

REMOVE A CONDITION

1. Locate the question whose condition you want to remove.
2. To the right of the question, expand the **Show Detail** option.
3. Next to the name of the condition, click the click the ⊖ icon.
4. Click **Okay**.

REMOVE A CONDITION'S CRITERION OR APPLIED ELEMENT

1. Locate the question whose condition criterion or applied element you want to remove.
2. To the right of the question, expand the **Show Detail** option.
3. Click the name of the condition.
4. In the Criteria or Applied Element section, next to the name of the criterion or applied element, click the click the ⊖ icon.
5. Click **Okay**.

GROUPS

Group questions are used to group a series of questions together in a table-style format. Group questions can be added to the Main Body, a page, and sections.

GROUP OPTIONS

Section	Setting	Description
General	Name	The Name is the text that is displayed in the setup section of the Document to identify the question. The Name does not appear in the printed Document.
	Float Element	Floating an element allows you to position multiple sub-sections, groups, or composite questions next to each other in a Document.
Group Option	Display Radio	For groups that will include Yes/No or List questions, the Display Radio option displays the questions added to the group as radio buttons and the column headings are the list values.

		Customization options include:
		Show All Labels: If checked, this option displays each of the list values as the column heading title. If unchecked, only the lowest and highest list values will be displayed.
		Sub Label: If text is entered as a sub label, additional text will display above the group questions. You can use the sub label to provide additional information or directions regarding the questions.
	Show Totals	If you create a group with only numbered questions, the Show Totals option will automatically calculate the total of the numbers for you on the completed Document.
Numbering	Number Group	If checked, the group title will be numbered.
	Sub Element Format	You can choose to number any sub elements included in the group. The drop-down list includes formatting options.
		Customization options include:
		Tier Numbering: This option combines the main element and sub element numbers. For example, 1.1, 1.2, 2.1, etc.
		Continuous Numbering: This option will number questions in a continuous sequence regardless of whether the questions are included in the same or different sections.
Displayed Text	Title	The Title is the text that will appear in a printed Document. A title is not required.
	Style	The style drop-down allows you to specify unique formatting for the group. By default, the group will inherit the style selected for the main Document.
	Header	Any text that you include in the header field will appear before the questions that you add to the group.
	Footer	Any text that you include in the footer field will appear after the questions that you add to the group.

ADD A GROUP

Group questions are used to group a series of questions together in a table-style format. Groups can be added to the Main Body, a Page, and sections.

1. In the Document, complete one of the following options:
    a. To add a section from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a section within another section, click **Add**.

2. From the **Class** drop-down list, click **Group**.
3. In the **Name** field, type a name for the group.
4. To float the group, click **Float Element**. In the **Width** field, specify the percentage of horizontal space you want the group to occupy.
5. If applicable, in the **Group Option** section, click the **Display Radio** option. **Note:** This functionality is only available for Yes/No and List question types.
    a. If required,
6. If applicable, in the **Group Option** section, click **Show Totals**.
7. To number the group, in the **Numbering** section, click the **Number Group** option.
8. To specify the formatting of the group, in the **Numbering** section, expand the **Sub Element Format** drop-down list. Select a format.
9. To include a displayed title for the section, in the **Displayed Text** section, in the **Title** field, type the group title.
10. To specify the style of the group, complete one of the following options:
    a. To use the same style as the main Document, in the **Style** drop-down list, click **Inherit**.
    b. To use a different style than the main Document, in the **Style** drop-down list, select one of the other available styles.
11. If required, in the **Header** section, type the header text.
12. If required, in the **Footer** section, type the footer text.
13. Click **Save**.

After you finish: Add a question.

PAGES

PAGE OPTIONS

Section	Setting	Description
General	Name	The Name is the text that is displayed in the setup section of the Document to identify the question. The Name does not appear in the printed Document.
Numbering	Number Page	If checked, the page title will be numbered.
	Sub Element Format	You can choose to number any sub elements included in the page. The drop-down list includes formatting options.
		Customization options include:
		Tier Numbering: This option combines the main element and sub element numbers. For example, 1.1, 1.2, 2.1, etc.
		Continuous Numbering: This option will number questions in a continuous sequence regardless of whether the questions are included in the same or different sections.

Displayed Text	Title	The Title is the text that will appear in a printed Document. A title is not required.
	Style	The style drop-down allows you to specify unique formatting for the page. By default, the section will inherit the style selected for the main Document.
	Header	Any text that you include in the header field will appear before the questions that you add to the page.
	Footer	Any text that you include in the footer field will appear after the questions that you add to the page.

ADD A PAGE

Pages are used to separate your Document across multiple pages. Enabling pages means that users will be required to click "next" when filling out the Document to move on to the next page.

Prerequisite: To add a new page to your Document, the Pages feature must be enabled. If pages are not currently enabled for your Document, see the Update your Document to include Pages topic for more information.

1. In the Document, in the **Main Body**, click **Add Page**.
    a. To add a section within another section, click **Add**.
2. In the **Name** field, type a name for the page.
3. To include a displayed title for the page, in the **Displayed Text** section, in the **Title** field, type a title.
4. To specify the style of the page, complete one of the following options:
    a. To use the same style as the main Document, in the **Style** drop-down list, click **Inherit**.
    b. To use a different style than the main Document, in the **Style** drop-down list, select one of the other available styles.
5. If required, in the **Header** section, type the header text.
6. If required, in the **Footer** section, type the footer text.
7. Click **Save**.

After you finish: Add a section, add a group, add a composite question, or add a question.

COMPOSITE QUESTIONS

Composite questions allow you create a set of questions across the same horizontal line and allow the responder to answer the set of questions as many times as applicable. Composite questions can be added to the Main Body, a page, sections, and groups.

COMPOSITE QUESTION OPTIONS

Section	Setting	Description

General	Name	The Name is the text that is displayed in the setup section of the Document to identify the question. The Name does not appear in the printed Document.
	Float Element	Floating an element allows you to position multiple sub-sections, groups, or composite questions next to each other in a Document.
Composite Question Option	Show Totals	If you create a composite question with only numbered questions, the Show Totals option will automatically calculate the total of the numbers for you on the completed Document.
	Use Abbreviation	If checked, this option will make use of any abbreviated question names that you have setup for questions included within the composite question.
Numbering	Number Composite Question	If checked, the composite question title will be numbered.
Displayed Text	Title	The Title is the text that will appear in a printed Document. A title is not required.
	Style	The style drop-down allows you to specify unique formatting for the composite question. By default, the composite question will inherit the style selected for the main Document.
	Header	Any text that you include in the header field will appear before the questions that you add to the composite question.
	Footer	Any text that you include in the footer field will appear after the questions that you add to the composite question.

ADD A COMPOSITE QUESTION

Composite questions allow you create a set of questions across the same horizontal line and allow the responder to answer the set of questions as many times as applicable. Composite questions can be added to the Main Body, a page, sections, and groups.

1. In the Document, complete one of the following options:
    a. To add a section from the **Main Body** or a **Page**, click **Add Element**.
    b. To add a section within another section, click **Add**.
2. From the **Class** drop-down list, click **Composite Question**.
3. In the **Name** field, type a name for the section.
4. To float the section, click **Float Element**. In the **Width** field, specify the percentage of horizontal space you want the section to occupy.
5. If applicable, in the **Composite Question Option** section, click **Show Totals**.
6. If applicable, in the **Composite Question Option** section, click **Use Abbreviation**.
7. To number the composite question, in the **Numbering** section, click the **Number Section** option.

8. To include a displayed title for the composite question, in the **Displayed Text** section, in the **Title** field, type a title.
9. To specify the style of the composite question, complete one of the following options:
    a. To use the same style as the main Document, in the **Style** drop-down list, click **Inherit**.
    b. To use a different style than the main Document, in the **Style** drop-down list, select one of the other available styles.
10. If required, in the **Header** section, type the header text.
11. If required, in the **Footer** section, type the footer text.
12. Click **Save**.

After you finish: Add a key question.

ADD A KEY QUESTION

A key question is the first question that a responder answers as part of a composite question. Answers for key questions are required. The following types of questions can be used as key questions: Number, Text, Yes/No, Date, List, User, Service, Case Service, and Site.

1. In the **Composite Question** section, click Add **Key Question**.
2. In the **Add** section, complete one of the following options:
    a. To add a new question as the key question, click **New Question**. Continue on to Step 3.
    b. To add a previously shared question as the key question, click **Shared Question**. In the **Question** field, type the name of the question that you want to add and select. Click **Save**.
3. In the **New Question** section, in the **Name** field, type the name of the question.
4. In the **Question Type** drop-down list, select the question type.
5. Complete the remaining fields as required. For more information about creating questions, see the New questions topic.
6. Click **Save**.

After you finish: Add a question or add a shared question to your composite question.

SIGNATURES

ABOUT SIGNATURES

The Signatures feature enables you to capture electronic signatures on completed Documents and to automatically create signature lines for printed Documents. Signatures can be added to all Document types (i.e. Forms, Surveys, Outcomes Assessments and Letters), and you can include as many signatures in a Document as you'd like. You can also choose to include optional header and/or footer text.

You can use the Signatures feature to capture the signature of a staff member, a client, an associate, etc. For more information about the types of signatures available, see the Signature Types topic.

SIGNATURE TYPES

Signature type	Description

Blue Book	**Use case**: To capture the signature of someone who had been previously added to your Blue Book.
	The signature line in the Document is a lookup field that allows you to search current Blue Book entries. Subsequently, the name of that Blue Book entry appears below the signature line in the Document. The Blue Book contact can then sign the Document electronically or sign a printed copy.
Individual	**Use case**: To capture the signature of someone who has been entered as an Individual in your Penelope database.
	The signature line in the Document is a lookup field that allows you to search for Individuals. Subsequently, the name of the Individual appears below the signature line in the Document. The individual can then sign the Document electronically or sign a printed copy.
Individual Completing Document	**Use case**: To capture the signature of the person who the Document is being completed for.
	The signature field is automatically populated with the name of the individual the Document is being completed for as identified when initially filling out the Document. Subsequently, the name of the Individual appears below the signature line in the Document. The individual can then sign the Document electronically or sign a printed copy.
Not Identified	**Use case**: To capture the signature of a person who is not entered in your your Penelope database in any capacity. For example, capturing a witness signature.
	The Not Identified signature field is a simple short text field that you can populate with the name of the appropriate person.
User	**Use case**: To capture the signature of a worker when they will not be electronically or physically signing the Document.
	The signature line in the Document is a lookup field that allows you to search for worker names.
User Secured	**Use case**: To capture the signature of a worker.
	The signature line is automatically populated with the name of the worker logged into Penelope. Subsequently, the name of the worker appears below the signature line in the Document. The worker can then sign the Document electronically or sign a printed copy.

ADD A SIGNATURE TO A DOCUMENT

1. In the **Revision** section, click the **Signature** tab.
2. In the **Signatures List** section, click **Add**.

3. From the **Type** drop-down, select the type of signature you want to add.
4. In the **Text** field, type a label for the signature.
5. To set the location of the signatures, in the **Location** section, customize the following options:
    a. In the **Row** number field, set which row number you'd like the signature to appear on.
    b. Select a **Position**.
6. Click **Save**.

REMOVE A SIGNATURE FROM A DOCUMENT

1. In the **Revision** section, click the **Signature** tab.
2. In the **Signatures List** section, next to the signature that you want to remove, click the ⊖ icon.

ADD HEADER TEXT BEFORE YOUR DOCUMENT SIGNATURES

1. In the **Revision** section, click the **Signature** tab.
2. In the **Header** section, click **Edit**.
3. In the **Title** field, type a title for the signature header.
4. In the rich text field, type the header text.
5. Click **Save**.

ADD FOOTER TEXT AFTER YOUR DOCUMENT SIGNATURE

1. In the **Revision** section, click the **Signature** tab.
2. In the **Footer** section, click **Edit**.
3. In the **Title** field, type a title for the signature footer.
4. In the rich text field, type the footer text.
5. Click **Save**.

LAYOUTS

ABOUT LETTER LAYOUTS

When creating your letter, you can include data fields and data lists to pre-populate the letter with data from the client's file. You can also include a series of questions that you respond to in order to populate the variable components of the letter. Finally, you can customize the formatting and layout of the letter.

You can populate the content of the letter with fixed paragraphs of text as well as auto-populate client-specific information from the questions that you set up. Client-specific information can be added to the body of the letter by including a series of formatted tags; for example, you can include Document, Agency, Agency Address, Question, and Signature tags. For example, if you want to include your Agency Logo in the top left-hand corner of the letter, you would copy and paste the [~AgencyLogo~] tag into the top left of the layout editor.

To auto-populate client information from the questions that you set up previously, you would copy and paste the relevant [~QuestionX~] tag into the body of the letter. For example, if the first question in the Main Body of the letter is a data field question for Client Name (meaning you will be pulling that data directly from the client's file),

you would copy and paste "Dear [~Question1~]" in your letter layout. When printing the completed letter for any client, the Document will then automatically insert their name here.

LAYOUT TAG TYPES

Tag type	Description
Document tags	To automatically populate the Letter with system generated information about the Document. Options include: • [~DocName~] • [~DocDate~] • [~EnteredBy~] • [~LastModBy~]
Agency tags	To automatically populate the Letter with information about your agency or organization. A user configures the fields listed below from the System Administration panel in your Penelope database in the Agency section. Options include: • [~AgencyLogo~] • [~AgencyName~] • [~AgencyPhone~] • [~AgencyFax~] • [~AgencyEmail~] • [~AgencyURL~]
Agency Address tags	To automatically populate the Letter with the mailing address of your agency or organization. A user configures the fields listed below from the System Administration panel in your Penelope database in the Agency section. Options include: • [~AgencyAddress1~] • [~AgencyAddress2~] • [~AgencyCity~] • [~AgencyStateOrProv~] • [~AgencyCountry~] • [~AgencyPostalZip~]
Question tags	To automatically populate the Letter with client-specific information from the questions that you set up. The question tags will appear with the following formatting: • [~Question1~] Question Name
Signature tags	To automatically populate the Letter with the signatures captured in the Document. The list of available signatures reflects the specific list of signatures that you configure for the Document. The signature tags will appear with the following formatting:

- [~SignedBy1L~]
- [~ESig1L~]
- [~SignatureDate1L~]

SUB-DOCUMENTS

ABOUT SUB-DOCUMENTS

The sub-Documents feature enables you to add an existing finalized Document from your database into the Document that you're creating. Using sub-Documents allows users to fill both Documents out at the same time if needed. You can choose to make the sub-Document required or optional.

ADD A SUB-DOCUMENT

1. In your Document, in the **Main Body** section, click **Add Sub Document**.
2. From the **sub Document** drop-down list, select a **Document**.
3. To make the completion of the **sub-Document** required, click the **Required** option.
4. Click **Save**.

Once you have added the sub-Document, a Converted Body section will be available. You can edit whether the sub-Document is required or not or remove it entirely from the Document from the Converted Body section.

STAGES

ABOUT STAGES

The Stages feature enables you to set Initial, Progress, and Close stages for Documents that may need to be filled out at various points of service for clients. Outcomes Assessments and Surveys automatically include Stages, but you can choose to include Stages for Forms. Documents that make use of Stages can only include one Initial and Close stage respectively. Outcomes Assessments and Forms can include multiple Progress stages.

STAGE RULES

Stage Rules can be set for the Initial, Progress, and Close stages such that certain questions or groups of questions can be shown or hidden depending on when the Document is being filled out.

Rule option	Description
Display Initial Stage	Shows data from a chosen section or question from an Initial Stage Document when filling out at the Progress or Close stage
Hide For This Stage	Hides a chosen section or question so it cannot be filled out on a given stage

Only Show For This Stage   Shows a chosen section or question only when filling out at the selected stage

ADD A STAGE RULE

1. In the Document, in the **Revision** section, click the **Stage Rules** tab.
2. In the stage you want to apply the stage rule to, click **Add**.
3. From the **Rule** drop-down list, select a rule option.
4. In the **Apply** on section, select the element the rule should be applied to.
5. Click **Save**.

TURN ON THE STAGES FEATURE FOR A FORM DOCUMENT

1. In the Document, click **Use Stage**.
2. From the **Stage** drop-down list, select the stage that you want to add.
3. In the **Name** field, type a name for the stage.
4. Click **Save**.
5. Repeat steps 2-4 as required.

ADD A STAGE TO A DOCUMENT

Documents can include only one Initial and Close stage respectively. Outcomes Assessments and Forms can include multiple Progress stages.

1. In the Document, in the **Stage List** section, click **Add**.
2. From the **Stage** drop-down list, select a stage.
3. In the **Name** field, type a name for the stage.
4. Click **Save**.

REMOVE A STAGE FROM A DOCUMENT

1. In the Document, in the **Stage List** section, locate the stage that you want to remove.
2. Next to the stage that you want to remove, click the ⊖ icon.

CHANGE THE NAME OF A STAGE

1. In the Document, in the **Stages List** section, click the name of the stage you want to change.
2. In the **Name** field, type a new name.
3. Click **Save**.

creating client facing documents

ABOUT CLIENT FACING DOCUMENTS

When the Engage feature is enabled, Client Workflows can be initiated allowing clients to complete Documents outside of Penelope. Client Workflows can be two types: New Document and Checklist tasks. You can send either one or many Documents to a client.

To make a Document available to be sent to a client through a New Document or Checklist workflow, the Document must be flagged as client facing. You should also follow the considerations outlined in the Best practices for client facing Documents topic.

Documents that are used in Client Workflows can be assigned to the following levels in Penelope: Individual, Case, Service File, and Service Event.

BEST PRACTICES FOR CLIENT FACING DOCUMENTS

The following items are best practices and general considerations when developing Documents for clients.

Document element	Best practices and considerations
Sub Documents	Sub Documents cannot be used for client facing Documents.
Data fields, data lists	Data field and data list question types are not displayed in client facing Documents, as these question types display information that is stored locally in Penelope. Engage displays information in a publicly accessible webpage, so we cannot display this type of information in order to avoid making client information publicly accessible.
Stage rules	Some stage rules do not apply to client facing Documents; for example, stage rules that display questions from a previous stage (these questions will not be shown).
User question type	The User question type will not display in client facing Documents.
Group totals	Group totals do not display to the client while completing the Document, but they are displayed in Penelope once the Document is completed.
Scores	Scores do not display to the client while completing the Document, but they are displayed in Penelope once the Document is completed.
Flags	Flags do not display to the client, but they are displayed in Penelope once the Document is completed.
Signatures	Signatures are not included in client facing Documents.

| Dates | For the "Date with age in days" and "Date with age in years" questions, the calculated age does not display to the client while completing the Document, but it will display for the worker reviewing the Document. |

MAKE AN EXISTING DOCUMENT CLIENT FACING

Before making an existing Document client facing, you should review the best practices and considerations outlined in the Best practices for client facing Documents topic.

1. In the Document information section, click **Edit**.
2. Click the **Client Facing** option.
3. Click **Save**.

previewing documents

ABOUT PREVIEWING DOCUMENTS

You can preview your Document throughout the creation process to review its layout and functionality. In preview mode, the functionality of the Document will operate normally, and you can fill out your Document exactly as a user would. For example, required questions will apply in the preview just as they would in production.

You can preview your Document as many times as you like. Each instance of the Document preview will appear in the Previews sidebar until the Document has been finalized (at which time all previews will be automatically erased). The preview functionality remains available until the Document is finalized.

PREVIEW A DOCUMENT

1. In the Document, expand the **Previews** sidebar.
2. Click **Add**.
3. In the **For Individual** field, type the name of a client or test client.

A preview of the Document will appear.

PREVIEW A CLIENT FACING DOCUMENT

1. In the Document, expand the **Previews** sidebar.
2. Click **Client Facing Preview**.
3. In the **Client Preview** window, click the link to view the Document.

A preview of the Document will appear.

creating action triggers

ABOUT ACTION TRIGGERS FOR DOCUMENTS

There is set of Action Triggers specific to Documents that are available to those workers who have access to the Document List. These Action Triggers operate in the same manner as the standard set of Action Triggers in that they enable you to send automated messages to your staff members in Penelope based on a set of parameters that you define. The key differences include where the Action Triggers are set up (on the user side in the Setup Sidebar in the Document List), and the Action Triggers are set up on a Document-by-Document basis. This type of set up allows you to customize the Action Triggers to the specific Document (for example, you can flag specific questions in a Document or monitor the change in score).

For more information about Action Triggers, see the Action Triggers Guide.

SET UP AN ACTION TRIGGER FOR DOCUMENTS

When setting up an Action Trigger for Documents, you can customize the Rule Category, defining parameters, the type of action, and who receives the action.

Step 1: Create the Action Trigger

Complete this setup to configure which Rule Category and Action Trigger you'd like to enable as well as the Rule Name and Defining Parameters as applicable.

Prerequisite: You must be logged in to Penelope using a worker account that has access to the Document List.

1. Expand the **Setup** sidebar.
2. Click **Document List**.
3. In the **Results** list, under **Title**, click the name of the Document that you want to add an Action Trigger to.
4. In the **Revision** section, click **Action Trigger**.
5. Click **Add**.
6. In the **Action Trigger** drop-down list, select an Action Trigger.
7. In the **Rule Name** field, type a name for the Action Trigger.
8. If required, in the **Defining Parameters** section, specify any additional parameters for the Action Trigger.
9. Click **Save**.

Step 2: Configure What Action to Take

You can determine what type of message should be sent to staff: an alert, a notification, or a workflow task.

1. In the **What Action to Take** section, click **Edit**.
2. In the **Action Type** section, select which type of action you want to send (Alert, Notification, or Workflow).
3. In the **Title** field, type a name for the Action Trigger.
4. In the **Priority** drop-down list, select a priority.
5. In the **Attach Action To** section, select which layer the Action Trigger is attached to.
6. Complete one of the following options:
   a. If you selected Alert or Notification in Step 2, proceed to step 7.
   b. If you selected Workflow in Step 2, complete the remaining fields.
      i. In the **Workflow Type** drop-down list, select which type of workflow task to create.

       ii.   In the **Assigned To** drop-down list, select who the task should be assigned to.

      iii.   In the **Due** field, type the number of days in which the task is due.

7. If required, in the rich text field, type any additional information that you want to include in the message.
8. Click **Save**.

Step 3: Configure Who Receives the Action

You can determine who receives the message. Depending on which Action Trigger you are configuring, you will have the option of sending the action to a worker category, a specific worker, the reports of a specific worker, etc.

1. In the **Who Receives the Action** section, click **Edit**.
2. If applicable, in the **Worker Category** drop-down list, select a worker category.
3. If applicable, in the **Other** section, specify individual workers who should receive the message.
4. Click **Save**.

Step 4: Enable the Action Trigger

1. Click **Enable**.

DISABLE A DOCUMENT ACTION TRIGGER

Disabling an Action Trigger stops the Action Trigger from sending the associated message to workers. The Action Trigger will still appear in the Action Triggers list as "Inactive".

Prerequisite: You must be logged in to Penelope using a worker account that has access to the Document List.

1. Expand the **Setup** sidebar.
2. Click **Document List**.
3. In the **Results** list, under **Title**, click the name of the Document whose Action Trigger you want to disable.
4. In the **Revision** section, click **Action Trigger**.
5. In the **Results** section, under **Rule Name**, click the Action Trigger that you want to disable.
6. Click **Disable**.

DELETE A DOCUMENT ACTION TRIGGER

Deleting an Action Trigger stops the Action Trigger from sending messages to workers based on the defined criteria and removes it from the Action Triggers list.

Prerequisite: You must be logged in to Penelope using a worker account that has access to the Document List.

1. Expand the **Setup** sidebar.
2. Click **Document List**.
3. In the **Results** list, under **Title**, click the name of the Document whose Action Trigger you want to delete.
4. In the **Revision** section, click **Action Trigger**.
5. In the **Results** section, under **Rule Name**, click the Action Trigger that you want to delete.
6. Click **Delete**.
7. Click **okay**.

UPDATE A DOCUMENT ACTION TRIGGER

Prior to making changes to an Action Trigger that is currently in use, you must disable the Action Trigger temporarily. You can edit the Rule Name, Defining Parameters, Criteria, and Action settings of the Action Trigger.

Prerequisite: You must be logged in to Penelope using a worker account that has access to the Document List.

1. Expand the **Setup** sidebar.
2. Click **Document List**.
3. In the **Results** list, under **Title**, click the name of the Document whose Action Trigger you want to edit.
4. In the **Revision** section, click **Action Trigger**.
5. In the **Results** section, under **Rule Name**, click the **Action Trigger** that you want to edit.
6. Click **Disable**.
7. Make the desired changes to the Rule, Criteria, and Action.
8. Click **Enable**.

CREATE A NEW ACTION TRIGGER FOR DOCUMENTS BASED ON AN EXISTING ACTION TRIGGER

Creating a new Action Trigger based on an existing Action trigger takes a copy of the current Action Trigger and allows you to make modifications. This feature is particularly useful for when you want to set up a similar trigger (i.e. with the same Rule Category and Action Trigger type) but make modifications to the name, defining parameters, criteria, and action.

Prerequisite: You must be logged in to Penelope using a worker account that has access to the Document List.

1. Expand the **Setup** sidebar.
2. Click **Document List**.
3. In the **Results** list, under **Title**, click the name of the Document whose Action Trigger you want to copy.
4. In the **Revision** section, click **Action Trigger**.
5. In the **Results** section, under **Rule Name**, click the **Action Trigger** that you want to copy.
6. Click **Copy Action Trigger**.
7. In the **New Rule Name** field, type a name for the Action Trigger.
8. Click **Save**.
9. Make the desired changes to the Rule, Criteria, and Action.
10. Click **Enable.**

finalizing documents

ABOUT FINALIZING A DOCUMENT AND REVISIONS

When you have finished making changes to your draft Document, you can finalize the Document to make it available to users to complete. Each time you finalize a Document, you create a new Revision. Once a Document has been finalized, the components of the revision that you can modify are limited. Some modifications require that you create a new Document revision while some modifications require that you create an entirely new Document.

Changes allowed after finalizing the Document	• Document title and short title • Adding or removing stages • Adding or removing assigned classes and/or Case Services • Modifying the formatting of existing elements • Modifying lists • Editing the header or footer of the signature • Adding, removing, or modifying some Action Triggers • Modifying the layout of a Letter Document
Changes that require a new Document Revision	• Adding or deleting elements • Adding or deleting signatures • Using pages • Modifying the Question Tags in a Letter Document
Changes that require a new Document	• Modifying scoring

FINALIZE A DOCUMENT

1. In the Document, click the **Component** tab.
2. Click **Finalize**.

VIEW THE REVISION HISTORY OF A DOCUMENT

You can view the Revision History of your Document to see how often the Document template has been changed.

1. Locate the Document.
2. In the **Revision** section, click **Show Revision History**.

Each revision is listed including the date of last modification and status.

CREATE A NEW REVISION

The New Revision feature enables you to create ongoing revisions of a single occurrence of a completed Document. A revision does not create a copy but allows you to revise an existing Document without creating another occurrence as well as retaining the history of each time the Document was revised.

Note: Adding a revision to a Document automatically locks the previous revision but not the Document itself. The Document is not locked and can still be edited or revised, but the previous revision is locked.

1. Locate the Document.
2. In the **Revision** section, click **Show Revision History**.
3. Click **Add**.
4. Click **Okay**.
5. Modify the Document as required.

updating documents

CHANGE WHO A DOCUMENT IS COMPLETED FOR

1. In the Document, in the **Revision** section, click the **Component** tab.
2. Click **Edit**.
3. From the **Completed** for drop-down list, select a new option.
4. Click **Save**.

UPDATE YOUR DOCUMENT TO INCLUDE PAGES

Enabling the Pages feature for your Document is an irreversible action for the current and future revisions.

1. In the Document, in the **Revision** section, click the **Component** tab.
2. Click **Edit**.
3. Select the **Use Pages** option.
4. Click **Save**.

MAKE AN INACTIVE DOCUMENT ACTIVE

1. In the Document, click **Edit**.
2. Click the **Status** option.
3. Click **Save**.

MAKE AN ACTIVE DOCUMENT INACTIVE

1. In the Document, click **Edit**.
2. Clear the **Status** option.
3. Click **Save**.

UPDATE THE SHORT TITLE OF A DOCUMENT

1. In the Document, click **Edit**.
2. In the **Short Title** section, type a new short title
3. Click **Save**.

UPDATE THE TITLE OF A DOCUMENT

1. In the Document, click **Edit**.
2. In the **Title** section, type a new title
3. Click **Save**.