

AES

Adaptive Enterprise

Solutions

...unlocking the dawn of better results for your organization

SMART FORMS

USER GUIDE

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Overview of ICR – Smart Forms

ICR – Intelligent Character Recognition – forms are documents that can be generated from the Reports section, filled out quickly and easily by hand, and then scanned into the system, cutting down on the amount of time needed for data input.

Agencies will print out the forms the same as a Management Report and complete them as needed. There are forms for Intake – Head of Household and Additional Family Members, Program Entry, Program Exit, and Services. Each Client will be given a unique Client Personal Identifier number; this number insures that the Program Entry and Program Exit records will be attached to the correct Client.

The Basic Process for Using Smart Forms

- 1 Print form(s)
 - a These can be printed in quantity and kept in reserve
 - b There may be specific setting for your printer
- 2 Fill out form(s) for Client
- 3 Scan form(s)
 - a There may be specific settings for your scanner

Printing the Smart Forms

Smart Forms are printed from a Management Report.

- Multiple pages of a form are linked together by the **Form Set Number**. Each time the report is opened, the Form Set Number will be a successive number. The Form Set Number is printed near the bottom of each page.
 - *For example*, Intake will have a Cover page and a Head of Household page; they will both have the same Form Index Number printed at the bottom of the page. If there are additional members of the household, the Additional Household Member page must have the same Form Set Number.
- Forms may be printed in quantity and held in reserve, as long as the pages of a Form Set are kept together.

Printers

- Printers must be able to print in color

Printing process

- 1 Select Report Menu
 - 2 Select Management Report
- In the Internet Browser window that opens:
- 3 Select the Report to print
- In the new Internet Browser window that opens:
- 4 Select Parameters
 - a Different report types may have slightly different parameters
 - b Number of Form Sets to print is the quantity of forms to print
 - 5 Click VIEW REPORT

When the report appears:

- 6 Select Adobe (PDF) file in the *Select a format* field
- 7 Click EXPORT link

You will see a message asking if you want to open or save the file.

- 8 Select OPEN

The report will open in Adobe Acrobat.

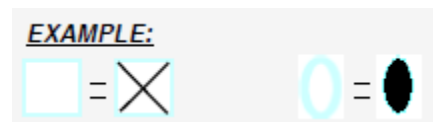
- 9 Select the File Menu and Print or click the Printer icon button
- 10 On the Print popup window,
 - a **Select NONE for Print Scaling**
 - b **Make sure you are printing in color on a color printer**
 - c **Always print just one copy of a form**
 - i) The number of form sets was already defined as a parameter

Some Clients may have a separate Intake Additional Member form that will be printed separately and used as needed.

Now you are ready to fill out the forms, see next page for instructions.

Filling Out Forms

- The forms have three kinds of data input:
 - Boxes to write a letter or numeral (names, addresses, etc)
 - Squares to mark when more than one selection may be made
 - Ovals to mark indicating only one selection may be made
- Handwriting Guidelines
 - When entering letters and numerals, handwriting is critical, the system will do its best to decipher handwriting but fewer errors will be made if the writing is clear and legible
 - Block capital letters must be used
 - Write in ALL CAPS
 - Use a ballpoint pen with BLACK ink
 - Keep the writing within the squares or ovals
 - Square: Use an X in the square; mark ALL that apply
 - Oval: Color in the complete oval; mark ONLY ONE
 - Do not make any additional marks outside the square or oval boundaries
 - If the entire letter or mark is within the boundary, the better chance of a successful read



- Do not fold or tear the form
- For Intake, there must be a Cover page and Head of Household page
 - If there is an additional member of the Household, the Additional Member page should be used and the Form Set number entered on the page
 - One page should be used for each additional member of the household
 - The Form Set number guarantees that all members of the household will be kept together
 - Some Clients may have an Additional Members page that is included in the Form Set, and if there is more than one additional member of the household, the page will need to be copied for each member
- Each form MUST have a full Client Personal Identifier; the last four digits of the Client Social Security Number is required

Now the Form is ready to be scanned, see next page for instructions.

Scanning Forms

Your Scanner may have specific settings that have already been determined by your Network Administrator.

Default Scanner settings:

- Output = TIFF (.tif)
- Mode = B&W
- Create single page items – this means a 3-page form should be 3 separate TIF files
- File size must be less than 100KB

- Scan the forms of a set together
 - Processing will be faster when Form Sets are scanned together and in the correct order, but if forms do accidentally get mixed up, they will still be processed correctly
 - Intake forms will be placed on Hold until all forms for the entire household have been scanned

Making Corrections

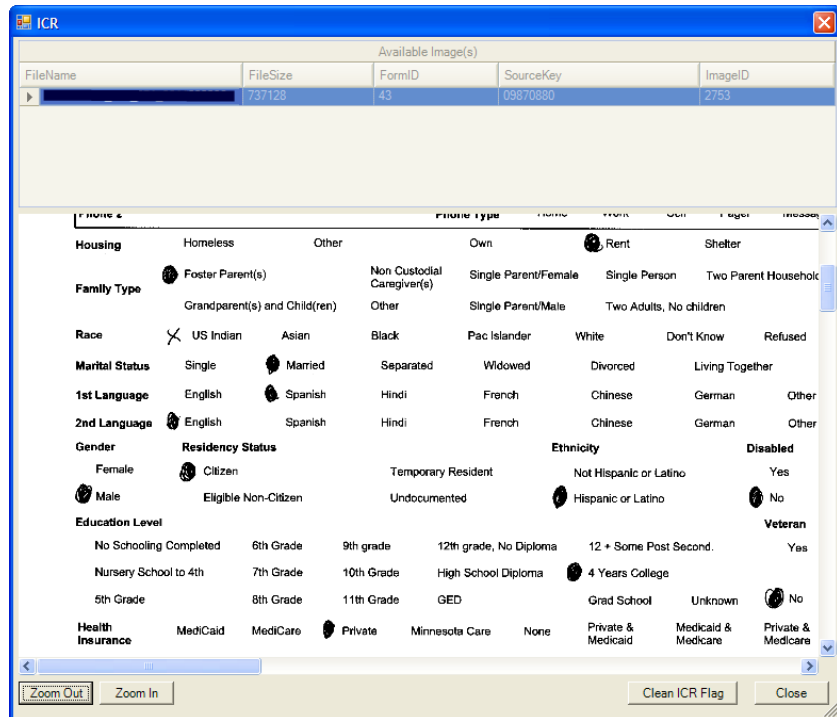
- Scanned images will be available on the Client’s Central Intake Documents page

- If corrections need to be made to a Client record, they should be made in Central Intake

- If a red outline appears around a field on a Client record, it indicates an uncertain read
 - Click in one of the fields of items to be corrected
 - Click the ICR button in the toolbar at the top of the page



- The original scanned form will open in its own window, use this to find the correct information
- Zoom In or Out with the buttons in the lower left corner
- Click CLOSE to close the ICR form window
- Make all corrections to the record, all fields needing possible corrections will be outlined in red
- Save the changes with the SAVE button
- Click the ICR button again
- Click the CLEAR ICR FLAG button at the bottom of window



- If Client information is changed in Central Intake after the Program Entry form is scanned, remember to update the Client’s Snapshot

- If scanning forms for Program Entry, Program Components and Activities will not be created automatically

Glossary

Information shown at the bottom of each printed form:

The diagram shows a horizontal line representing the bottom of a form. Below this line, several fields are listed. Yellow boxes with numbers 1 through 7 are placed above and below the fields to indicate their corresponding definitions. Field 1 is 'Form ID' with value '1'. Field 2 is 'HMISINTAKE'. Field 3 is 'Region1'. Field 4 is 'TRN'. Field 5 is '22345'. Field 6 is 'Form Index' with value '1 - 3'. Field 7 is 'Page 1 - 3'.

- 1 **Form ID** – identifies the Type of Form (Entry, Intake, etc.); each form type has a unique Form ID
- 2 **Name of Form** – each form is identified as being Intake, Entry, Exit, etc. along with type of module
- 3 **Region Name** – identifies Organization printing form
- 4 **Org Code** – identifies the Organization printing form
- 5 **Form Set Number** – this number links multiple pages of a form
 - a *For example*, the Intake will have a Cover page and a Head of Household page; they will both have the same Form Set Number printed at the bottom of the page. If there are additional members of the household, the Additional Household Member page must have the same Form Set Number.
 - b Each time the report is printed, the Form Index Number will be a successive number
- 6 **Form Index** – internal Adsystem required field for identifying form
- 7 **Page Number** – shows current page number and total number pages of this form

Form Set – a set of forms that are dependent on each other for successful processing into the AES Enterprise system; each Form Set is identified by a unique Form Set Number entered or printed on the form. Each form in the Form Set must be successful in order for the set of pages to be processed.

For example, the Intake Form Set consists of a cover page, a Head of Household page and a page for each additional member of the Household; a Program Entry Form Set may contain multiple pages depending on the information collected

Form Source Key – identifies the specific location a particular form is coming from; it is created on the Smart Form Setup page in the Data Conversion Library and linked to a specific file location path on the Smart Form Service Setup popup window

ICR (Intelligent Character Recognition) – a software process used to convert hand printing to text; used primarily in structured forms, this process works best when the form contains boxes for hand entry such as the hand printed entry for a name or address

Pixel (short for **P**icture **E**lement) – is the smallest addressable screen element; the address of a pixel corresponds to its coordinates

Reference Key – black squares located in three corners of all forms that ensure correct alignment of the form

Smart Form – an electronic form with capabilities beyond a traditional paper form, such as electronic completion, dynamic sections, and electronic submission