

INSTRUCTIONS FOR USING HEALTHCARE TEMPLATES (WITH TVR ID ADDED).

(See our online help guide for full instructions on any of the steps)

1. Save the segment and form files on your computer.
2. Open the segment file in the segment editor. This can be done by double clicking on the file and FormReturn will open automatically.
3. Adjust the size of the barcode area at the top to suit the size of your barcode labels. If you're not using labels, delete the area by clicking on it and pressing your delete key.
4. Type the question text in the text areas for each question by double clicking on the text area. To change the font size, select all the text areas at once and change the font size in the panel at left.
5. If you need to change the number of checkboxes in the mark area or the size and style of the checkboxes, double click on one of the mark areas to open the Mark Area Properties dialog and change the style to what you want and save the setting as a new pre-set style. Then select all the mark areas at once and choose that Preset Style from the Mark Areas panel at the left of the page and Apply Style.
6. When you have finished editing the segment, SAVE it and add it to the form template.
7. Open the form template file, click on the segment part of the form to select it and press the delete key. SAVE the template and then add a new empty segment area by clicking on the segment tool in the toolbar and then drag a small area on the form page. Click load segment in the panel on the left, choose the segment and click OK. The segment will load onto the page.
8. In the space at the top of the form, where it says Template Variable Replacement, type in your data table fieldnames that you want to be printed on the form. Eg: <<firstname>> <<lastname>>. Type them like this, surrounded by the less than and greater than symbols. Use the rest of the space at the top of the form to add any other text you want printed on the form.
9. Click on the Recognition Preview tab and make sure the barcodes, the segment and the fragments (mark areas) are all detected.
10. Please Contact us through the FormReturn website if you have any problems, by sending us an email with your segment and form files attached.
11. Next do a test preview by printing a form, (there is a print button in Recognition preview) fill in some of the bubbles in the mark areas and then scan it and save the image to your computer. Click browse images and open the form image in Test Preview and click all the Preview Check boxes. Make sure all your handmarks are detected properly. (you can double click to zoom in on each mark area)This is a test for your scanner's settings and whether it produces a good form image. A quality form image is vital for accurate OMR detection.
12. The next step is Form Publication and printing the forms to be distributed. Add a data table to Source data (FormReturn's database). This data table will hold your patient's records who will be completing the forms. There are 4 steps in the Publication process – Choose a data table, type a name for your publication, Click on Verify form structure and OK in the dialog that opens... (this verifies a form ID barcode is on every page that will be published), and keep the Form ID-Append only, publication type selected. Click the publish and PDF button and the publication will be saved to a PDF file on your computer. (take note of where you save it) Open the PDF file and print the forms. A form should be printed for each record in the data table you selected.
13. When the forms are returned, scan them and save to your computer.
14. Open the Processing Queue and click Upload Image to upload your form images into FormReturn's form processor.
15. Click on Captured Data and select the publication name to see the captured response data from each form. Click Forms, select a form and then click Form pages.

ID	Publication ID	Form ID	Page Number	Page Score	Processed Time
130	28	99	1	0.0	September 18, 2009
131	28	99	2	0.0	September 18, 2009
132	28	99	3	0.0	September 18, 2009
133	28	99	4	0.0	September 18, 2009

Field Name	Captured Value	Mark
fieldname1	B	0.0
fieldname2	A	0.0
fieldname3	A	0.0
fieldname4	B	0.0
fieldname5	B	0.0
fieldname6	C	0.0
fieldname7	B	0.0
fieldname8	C	0.0

16. To Export the captured data from the publication, click the publications tab again, select the publication name and click Export Data in the panel on the left. Click OK for the data to be saved to a CSV file. Open the CSV file from where it was saved and Click OK again. A spreadsheet will open from whatever application you have installed on your computer.