

Form Builder for Credible Care and Client Portal 2.0

The notes apply to the Credible Care for iOS and Android apps, and forms in Client Portal 2.0.

Credible Care

- **Test thoroughly!** If you anticipate that a form will be completed by users on mobile devices, test the form in all the environments in use at your Agency.
- **Questions types and form functionality** are supported on Credible Care.
 - **Is Lookup** questions are supported if the question uses **LookupDict** as the data source.
 - **Data Mapping** is supported.
 - **Form Groups** and **Group Visits** with **Schedule Groups** are supported.
- **Custom Styles and HTML:** Credible Care has its own way of displaying forms that varies from the standard web version. Please note that all styling and custom HTML is stripped out of forms before they are displayed in a Mobile solution.

Client Portal Forms

- For a form to be assigned to a Client Portal Visit, it must be created as **Form Type: Client Portal**.
- Existing Forms cannot be converted to Client Portal Forms; they must be recreated.
- To work on the widest variety of devices and screens, Client Portal Forms ignore most formatting set in Form Builder. The Preview available in Form Builder will still display the selected formatting; however, it will not display when the form is viewed in the portal.
- The **Push Button** and **Numeric Push Button** answer formats do not work in client portal forms.