

# Builder

## Expirations & Restrictions FAQ

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Expirations and Restrictions are two common ways of creating and filtering for questions, and making edits in bulk.

Using both the Filter List to narrow down your subset of questions, and the Bulk Edits tool, you can quickly and easily make updates to your participant forms.

This guide provides answers to frequently-asked questions (FAQs) and best practices for using Expirations and Restrictions in Builder.

# Expirations

Expirations are dates set on steps and questions that are used to prompt returning participants to reconfirm their existing information (**Review & Confirm - Step Expiration**) or to collect new information from returning participants (**Question Expiration**). *By default, information from your returning participants will carry over from year to year.*

Types of Expirations include:

- **Standard Expirations**
  - Review & Confirm (Step) Expirations
  - Question Expirations
- **Specialized Expirations** (*\*for upload fields only*)
  - Interval
  - Relative

## Frequently Asked Questions (FAQs)

### Q: What's the difference between Review & Confirm (Step) and Question expirations?

1. **Review & Confirm (Step) Expirations:** For returning participants, all answers will carry over from the previous year, and they will need to confirm it is still correct or update their entries.
  - **TIP:** We recommend automatically setting each step to Review & Confirm.
2. **Question Expirations:** If a field or form header has an expiration set, the previous answers will be cleared out completely, and the participant must re-answer the question.
  - **TIP:** We recommend expiring questions (i.e., have the participant re-answer) fields like the following:
    - Authorizations/Waivers
    - Information that changes from year to year (e.g., Grade, T-shirt Size)
    - Any time-sensitive question (e.g., 'recent' or 'within the past 12 months')

# Expirations

## FAQs

### Q: What's the difference between Interval and Relative expirations?

Interval and Relative expirations are only available for upload fields.

1. **Interval Expirations:** Used to reset information on a set interval (e.g. every 18 months). Once a participant uploads their file, the timeline for the interval begins.
2. **Relative Expirations:** Used to confirm the date of an event tied to an upload field, often a physical exam or certification (e.g. date of exam can be no earlier than XX date).

**Important:** Interval and Relative expirations **cannot** be updated in bulk. Upload fields with these expirations will need to be individually updated. Note, however, that upload fields with Standard expirations **can** be expired in bulk.

### Q: When should expirations be set up?

- If you're a returning organization, you'll work with your Client Success Team to set up Expiration Dates in year two of using our application.
- If you're past your two-year mark, you'll need to reset your expirations.
- If possible, expirations should be reset while your account is dormant so that no active participant's health profiles are cleared out and become incomplete.
  - **TIP:** Expiration dates in the past or in the future can be used to help minimize the effect on your current participants' completion percentages.

# Expirations

## FAQs

**Q: My organization operates year-round. How should I set expirations so that they don't affect the forms and completion status of my active participants?**

If your organization operates year-round, you'll need to be mindful about resetting expirations while there are live participants. We offer two different tracks for re-setting expirations for year-round organizations: **Standard** and **Manual**:

### Standard

Pick a set date to expire your forms and notify your families in advance that they will be prompted to update their forms (e.g. January 1<sup>st</sup> or the start of the school year).

### Manual

We recommend creating new fields where needed for the upcoming programs. Follow these tips below:

- **For questions that need to be re-answered:** copy the question and create a duplicate that is assigned to the new session(s) and labeled with the upcoming year. Assign the original question to the current programs, and the NEW field should be assigned to the new upcoming program(s).
- **For pages/steps that need to be reconfirmed:** add a prompt for the participant to reconfirm their information. This can be added as a **select question**, e.g. "I confirm the above information is up to date for 2025" where the only option is yes. Or, this can be added as an **authorization** if they need to collect a signature. When adding the prompt to reconfirm, assign to the new session(s) and label with the upcoming year.
- **For authorizations:** copy and duplicate the authorization and assign it to the new session(s) and label it with the upcoming year (for reporting and record retention purposes). Assign the original authorization to the current programs, and the NEW field should be assigned to the new upcoming program(s).

# Expirations

## FAQs

### How do I go about expiring Modules?

- **Immunizations Module:** The Immunization module itself cannot be expired and returning participant's records will automatically carry over. If you need to expire the Immunizations, you can remove the module and set up a standard **upload field** in its place. Please note that this workaround would eliminate the manual entry option.
- **Dimensions Module:** The Dimensions module itself cannot be expired. However, you may add a **form header** and set the expiration at the form header level in order to expire the height/weight fields.
- **Medications, OTC, Allergies Modules:** These modules can be expired directly, or you can set a **step-level expiration** for the participant to review and confirm.
  - **Tip:** The **Medications, OTC, and Allergies modules** should **not** be nested underneath a form header with an expiration because this can cause issues with completion status. Instead, set an expiration on the modules directly and any other fields that need to be expired under that form header.

# Restrictions

**Restrictions** are used to limit the questions that are displayed to participants based on specific criteria such as sex, age, and subgroup. Without applying restrictions, every active participant will be able to view all questions. With restrictions in place, only participants who meet the set criteria will be able to view the question(s).

The following restrictions are available when creating questions or steps, filtering for your list of questions or steps, or when applying bulk edits in Builder:

- **Sex Restrictions:** allow you to restrict questions or steps by sex assigned at birth.
- **Age Restrictions:** allow you to restrict questions or steps by age (options include 'As Older or Older Than' and 'Younger Than').
- **Subgroup Restrictions:** allow you to restrict questions or steps by the group to which the participant is registered. **Note that the list of subgroups that appear within your options stem directly from your account's group structure.**

## Best Practices

**When using Subgroup restrictions, use the highest level possible (ideally, the first level of your group structure or the level before the level that contains the year).**

By setting the subgroup restriction at a higher level before the year, you won't have to update the subgroup restrictions every year.

**Tip:** In Builder, if you hover over the name of the subgroup listed in the Subgroup Restrictions dropdown, you can preview the full path and see what level the subgroup lives in.

**Apply restrictions to the step or form header instead of individual questions whenever possible.**

Restrictions set on a step will apply to all questions within the step. Restrictions set on a form header will apply to all questions nested inside the form header.

# Filter List

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## Overview

Builder comes with its own built-in List Builder known as the **Filter List**. The right-side **Filter List** is where you can apply filters to narrow down the list of questions you can view or to which you can apply bulk edits. Like the List Builder, you may select multiple filters to narrow down your list to a specific subset of questions. The following filter options are available:

- **Draft:** questions that do or do not have drafts, or any pending changes you've made in your draftset.
  - **Note:** this filter will capture questions that have either the '**Draft**' or '**New**' labels associated with them, to include both pending changes to existing forms ('**Draft**') and newly-added questions that don't currently exist in your forms ('**New**').
- **Question Type:** Filter by Step, Form, Authorization, Yes/No, and all other Question Types found within your forms. *You may select multiple Question Types.*
- **Required:** Filter by whether or not the question or step is required to be completed by the participant.
- **Expiration:** Filter for questions before, on, or after an expiration date.
  - *Step 1) Select one: Before, On, After*
  - *Step 2) Enter Date*
- **Last Updated:** Filter for questions that were last updated between a specific timeframe.
- **Sex Restrictions:** Filter for questions restricted by sex: Male, Female, or Any.
- **Age Restrictions:** Filter for questions with specific age limits: As old or older than, or younger than.
- **Subgroup Restrictions:** Filter for questions by subgroup. *You <sup>7</sup> may select multiple subgroups.*

# Bulk Edit Options

Questions and Steps can be updated in bulk using the right-side **Questions Overview** panel. Bulk edit options include: Expiration, Sex Restriction, Age Restriction, and Subgroup Restriction.

Type	Definition
<p><b>Expiration</b></p>	<p>Expirations are used to collect new information from returning participants or to prompt returning participants to reconfirm their existing information. By default, information from your returning participants will carry over from year to year.</p> <p>The <b>Expiration</b> bulk edit option prompts an entry for a date on which the question or step expires.</p> <p>When setting an expiration on a <b>question</b>, the answers submitted prior to this date will be cleared from the participant’s profiles and they will be prompted to re-answer the question.</p> <p>When setting an expiration on a <b>step</b>, a prompt will appear for the participant to re-confirm their existing information, with the previous answers remaining in place.</p> <p>For more informations on Expirations, please check out the <a href="#">Expirations support article</a>.</p>

# Bulk Edit Options

Type	Definition
<b>Sex Restriction</b>	The <b>Sex Restriction</b> bulk edit option displays the question or step by sex assigned at birth (female or male).
<b>Age Restriction</b>	The <b>Age Restriction</b> bulk edit option displays the question or step based on the age of the participant. Options include: <ul style="list-style-type: none"> <li>• As Old or Older Than</li> <li>• Younger Than</li> </ul>
<b>Subgroup Restriction</b>	The <b>Subgroup Restriction</b> bulk edit option displays the question or step based on the group to which the participant is registered. A list of the subgroups that are set up in the account will appear.  <b>Note:</b> Multiple subgroups may be selected.