

Builder

Terminology

Welcome to Builder!

This glossary provides a list of key vocabulary used throughout our software, with an emphasis on Builder terminology. Reference this guide to help you become familiar with key concepts and learn how to use Builder.

If you don't find what you need, please reach out to your **Client Success Team** or check out our **Support Site > Glossary of Commonly Used Terms**.

Terminology

*Terms are listed in alphabetical order

Term	Definition
<p>Active Draftset</p>	<p>An Active Draftset is an updated version of the Health Profile that is waiting to be applied. Draftsets allow you to draft changes to your Health Profile forms in a preliminary state without impacting your live forms. A draftset is not reflected in the participant’s Health Profile forms until it has been applied. You can start work on a draftset, save it, and return to or wait to apply a draftset at any time, making it easy to work on any updates to your forms in more than one sitting.</p> <p>Tip: We recommend having only one active draftset open at a time.</p>
<p>Age Restriction</p>	<p>A restriction that may be applied when filtering for or bulk editing questions in Builder. This restriction displays the question or step based on the age of the participant.</p> <p>Options include:</p> <ul style="list-style-type: none"> • As Old or Older Than • Younger Than
<p>Allergies (Module)</p>	<p>The Allergies Module collects allergic reaction information from participants. If a participant answers yes to having an allergy, their MedKit icon will turn red, and the allergy information will display when you hover over the MedKit icon, as well as in the Health Log and eMAR.</p>

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<p>Applied Draftset</p>	<p>An Applied Draftset is a past draftset, or one that has been previously applied. The Applied Draftset tab includes a list of previously applied draftset(s), the name of the person who applied them, and the timestamp of when they were applied. This historical record of applied draftsets can be useful for referencing the last round of changes made in the Health Profile forms.</p>
<p>Authorization</p>	<p>An Authorization is a type of question that is used to collect electronic signatures on waivers, agreements, and authorizations.</p>
<p>Conditional Question</p>	<p>A Conditional question is a sub-question that is conditional based on a set answer to the previous question. Think of it as a follow up question with the goal of collecting information that may not apply to all participants. For example, based on the condition of a participant answering yes to a question, an additional follow up question appears.</p> <p>Conditional questions can be created when there are set answers to the original question, (i.e. Yes/No, Select, Medication, Allergies, and Authorizations that are Accept/Decline question types). Conditional questions should not be created based on any open text questions</p>

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Copy	<p>Create a copy of a question or a question + its sub questions(s). Copy a question by selecting it in the Questions Overview panel to activate Copy and place it in the Queue.</p> <p>Note: All contents of the step must be selected in order to copy the entire step.</p>
Dimensions (Module)	<p>The Dimensions Module collects a participant’s height and weight information. This information will appear in their MedKit as well as in the Health Log and eMAR.</p>
Download	<p>A Download is a type of question that consists of a downloadable form intended for the participant to retrieve, such as a handbook, packing list, or map.</p>
Editor Panel	<p>The center Editor Panel is where you can create steps, and edit, create, and deactivate questions.</p>
Encrypted	<p>An Encrypted text is a type of question that is typically used to capture sensitive information, such as social security numbers.</p>

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<p>Expanded Authorization</p>	<p>An Expanded Authorization is a type of question that is an expansion of the Authorization question type. You may add multiple sections that participants need to initial/accept, and multiple signature fields with a custom label.</p>
<p>Expirations</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>When setting an expiration on a question, 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 step, a prompt will appear for the participant to re-confirm their existing information, with the previous answers remaining in place.</p>
<p>Filter List</p>	<p>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</p>

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<p>Form</p>	<p>A Form is a type of question that allows you to create a form header within a page to more clearly organize the questions on a page. The form will appear as bolded text within the forms. Relevant questions can be added inside a form header.</p>
<p>Health Profile</p>	<p>The Health Profile is a set of steps and questions that collects participant information. In their Health Profile, participants complete the required forms determined by your organization.</p>
<p>Immunizations (Module)</p>	<p>The Immunizations Module collects participant immunization dates, either via an upload or manual input.</p>
<p>Inside</p>	<p>Inside = nested within a question or step</p> <p>Note: All questions are inside of a step. A sub-question is inside of a question.</p>
<p>Live Questionnaire</p>	<p>A Live Questionnaire is the current set up of your Health Profile forms that are viewed by your participants.</p>

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<p>Medications (Module)</p>	<p>The Medications Module collects scheduled medications from participants by asking a series of questions. If a participant answers yes to taking medications while at the program, the medication information will display when you hover over the MedKit icon, as well as in the Health Log and eMAR.</p>
<p>Module</p>	<p>Modules are pre-set questions that have limited customization options. Information entered into the modules (except for the Immunizations Module) will display in other areas of the application, keeping this critical health information accessible for your team. Below are the Modules that are available to use:</p> <ul style="list-style-type: none"> • Allergies • Medications • Over-the-Counter (OTC) Medications • Immunizations • Dimensions (height/weight) <p>The Allergies Module, Medications Module, and Dimensions Module filter into the eMAR (electronic medical administration record) and Health Log. The information the participant enters will also appear in their MedKit on the first page of their profile. The OTC Module filters into the Health Log only (<i>not</i> the eMAR).</p> <p>Important: Do <i>not</i> duplicate a module in the participant's forms.</p>

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<p>Move (Inside/Under)</p>	<p>The Move Inside and Move Under functionality is used to relocate questions and sub-questions (if applicable) to a new location within or across steps.</p> <p>Relocate a question by first selecting it in the Questions Overview panel to activate Move, then selecting the question or step within or under which you want to move the selected question.</p> <p>Note: A question can only be moved inside of a step, and not under a step. Steps can only be reordered using Move Up/Move Down.</p>
<p>Move (Up/Down)</p>	<p>The Move Up and Move Down functionality is used to reorder steps or questions. Adjust the placement of steps or questions by selecting them in the Questions Overview panel and clicking the checkbox to enable Move Up/Move Down.</p>
<p>Over-the-Counter (OTC) Medications (Module)</p>	<p>The OTC Module collects a participant-approved selection of OTC medications. Your Client Success Team can customize the list of OTC medications that appear. Approved OTC medications for each participant appear in the Health Log.</p>

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<p>Paste (Inside/Under)</p>	<p>Paste a copy of a question or a question + its sub-question(s).</p> <p>Paste Inside to place the selected question nested within the destination. For example, you may paste a question within a step or form header, or as a sub-question within another question.</p> <p>Paste Under to place the selected question beneath the destination question.</p> <p>Note: Sub Questions cannot be Moved or Pasted Inside of certain Question Types (e.g. <i>Dimensions, Instructions, Uploads</i>). Paste Under cannot be used for steps.</p>
<p>Paste Multiple</p>	<p>Copy and paste multiple copies of question or a question + its sub-question(s).</p> <p>Note: There is no limit to the number of times you can paste a question or sub-question to a new location.</p>
<p>Private Active Draftset</p>	<p>A Private Active Draftset is one that is only accessible by the provider who originally created it.</p>
<p>Public Active Draftset</p>	<p>A Public Active Draftset is one that is accessible by any provider in your account with access to the Builder.</p>

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Question	Questions are any of the fields that appear within a Step . See the Question Types Guide for a full list of the different types of questions available and best practices for their use.
Question Label	The Question Label is the title of the question that the participant sees.
Question Metadata Field	The right-side Question Metadata Field is activated when you select to edit a question or sub-question. You can set an expiration and/or lockout date, apply restrictions, and create translations.
Questions Overview Panel	The right-side Questions Overview Panel is where you can filter, move, copy, paste, and bulk update questions.
Queue	The Queue is an area within the Questions Overview panel that displays the question that is being moved or copied/pasted. Think of the queue as the clipboard or 'holding space' where the question is held before being moved or pasted inside or under its new location.
Select	Select is a type of question that has a set drop-down list of answers. Participants can select only one option from the list.

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<p>Sex Restriction</p>	<p>A restriction that may be applied when filtering for or bulk editing questions in Builder. This restriction displays the question or step by sex assigned at birth (female or male).</p>
<p>Step</p>	<p>A Step is the top-level grouping of questions and sub-questions. Steps allow you to organize the information that you are requesting from your participants. Think of a step as a page or section within a set of forms. Steps are listed in the center Editor panel and in the Questions Overview panel.</p>
<p>Step Label</p>	<p>The Step Label is the title of the step that the participant sees.</p>
<p>Subgroup Restriction</p>	<p>A restriction that may be applied when filtering for or bulk editing questions in Builder. This restriction 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.</p> <p>Note: Multiple subgroups may be selected.</p>
<p>Sub-Question</p>	<p>A Sub-Question is a question that is conditional based on the answer to the previous question. Think of it as a follow up question. Sub Questions can be created when there are set answers to the original question (yes/no, select, the Allergies and Medication modules, or an Authorization that can either be accepted or declined). Sub Questions should not be created based on any open text questions.</p>

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Text	Text is a type of question that allows for an open-text answer that can be formatted as short answer (default), date, email, large text, number, or phone.
Under	Under = physically beneath or after a question.
Upload	An Upload is a type of question that allows for for uploading documents, or downloading a template and re-uploading back to the system. This question type is often used for documents that are filled out external to CampDoc/SchoolDoc, or require a third-party signature (e.g. participant physicals).
Yes/No	Yes/No is a type of question that prompts a yes or no answer.
Yes/No + Details	Yes/No + Details is a Yes/No question with the addition of a sub-question asking for Details (short answer text) that automatically appears if the input is yes . The condition can be changed from yes to no if desired, and the input can be changed from short answer text to a different input type.
+ Create	Button used to create a new step or question, inside or under (if applicable).