Introduction to Builder

Training Guide

We're excited to introduce the Builder, a new self-service authoring environment for Health Profile forms.

We understand how valuable it is to be able to quickly and easily update the Health Profile forms in your account. Created in response to your feedback, the Builder gives you greater control and flexibility in managing your forms.

We're here to support your learning of this new tool so you may confidently manage and adapt your forms to fit your program's needs.

DOCNETWORK

Table of Contents

DOCNETWORK

Terminology

Term	Definition
Health Profile	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 and upload files as needed.
Active Draftset	An **Active Draftset** is a collection of draftsets 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.
Private Active Draftset	A **Private Active Draftset** is one that is only accessible by the provider who originally created it.
Public Active Draftset	A **Public Active Draftset** is one that is accessible by any provider in your account with access to the Builder. **Tip**: We recommend having one one public draftset open at a time for multiple providers to work on simultaneously.
Live Questionnaire	A **Live Questionnaire** is the current set up of your Health Profile forms that are viewed by your participants.

Terminology

Term	Definition
Step	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** right-side panel.
Question	Questions are any of the fields that appear within a **Step**. See **Question Types** for a full list of the different types of questions available.
Sub Question	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. For example, based on the condition of a participant answering ***yes*** to a question, an additional follow up question appears. 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.
Move Up/Down	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 the **Move Up/Move Down** functionality.

Terminology

Term	Definition
Inside	Inside = nested within a question or step **Note**: All questions are inside of a step. A sub question is inside of a question.
Under	Under = physically beneath or after a question
Move (Inside/Under)	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. 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. **Note**: A question can ***only*** be moved inside of a step, and ***not*** under a step. Steps ***cannot*** be moved.
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.
Copy	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**. **Note**: Steps cannot be copied.

DOCNETWORK

Terminology

Term	Definition
Paste Inside/Under	Paste a copy of a question or a question + its sub question(s). **Paste Inside** to place the selected question as a sub question nested within the destination question. **Paste Under** to place the selected question beneath the destination question. **Note**: Sub Questions cannot be **Moved** or **Pasted Inside** of certain **Question Types** (e.g. Dimensions, Instructions, Uploads). **Paste Under** cannot be used for steps.
Copy/Paste Multiple	Copy and paste multiple copies of question or a question + its sub question(s). **Note**: There is no limit to the number of times you can paste a question or sub question to a new location.

Terminology

Term	Definition
Module	**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: • **Allergies** • **Medications** • **Over-the-Counter (OTC) Medications** • **Immunizations** • **Dimensions (height/weight)** 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 (***not*** the eMAR). We encourage our organizations to use these Modules so that the participant's allergies and medications will transfer over to the eMAR and Health Log. **Important**: Because the Modules filter into other areas of the application and are pre-set, participants should only be assigned one version of each module. Do ***not*** duplicate a module in the participant's forms. If a participant is assigned more than one of the same module in their forms, the information they enter into the first will automatically carry over into the duplicate module. They will ***not*** be able to enter two different sets of information.

Question Types

There are several different question types available, and various ways to configure and customize each type. Learn how to manage specific settings, apply restrictions, and make edits to each question type:

Type	Definition
Allergies	The **Allergies** Module collects the allergic reactions from participants by asking the three questions (below). 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. • **Does [participant's first name] have food allergies?** • **Does [participant's first name] have drug allergies?** • **Does [participant's first name] have environmental allergies?** **Note**: The questions within the **Allergies** Module ***cannot*** be customized. However, you are able to add conditional sub questions based on the participant's response to the module questions. You can also add instructions to be displayed for participants (markdown/HTML friendly), set expirations, and set Sex, Age, and Subgroup Restrictions.

Question Types

Type	Definition
Authorization	**Authorizations** are used to collect electronic signatures on waivers, agreements, and authorizations. Once an authorization question has been accepted by at least one participant, the **Authorization Body** text [marked with an **asterisk (*)**] is no longer editable. All other fields are still editable. Editable Authorization questions include: • **Authorization Label** (for reporting purposes only; ***not*** visible to participants) • **Authorization body** (markdown/HTML friendly)* • **Required/Optional** • **Expiration** • **Sex, Age, and Subgroup Restrictions** • **Accept or decline** • **Authorization-specific settings** • **Translations**
Dimensions	The **Dimensions** Module collects Height and Weight. The participant's height and weight will appear in their **MedKit** as well as in the Health Log and eMAR.
Download	A **Download** is a downloadable form that the participant can retrieve (e.g. handbook, packing list, map, etc.). Download fields do ***not*** require action from the participants and are ***not*** required fields.

Question Types

Type	Definition
Encrypted	**Encrypted** text allows for a basic text input. However, the user will need to ***submit*** their input, making text appear as anonymized bullet text in both the Participant and the Provider Portals. ***This question type should be used for sensitive information such as social security numbers.***
Expanded Authorization	**Expanded Authorizations** are authorizations with the ability to add multiple sections that participants initial/accept, and multiple signature fields with a custom label. Once at least one section of an Expanded Authorization has been accepted by at least one participant, these fields marked with an **asterisk (*)** become non-editable. All other fields are still editable. Editable Expanded Authorization questions include: • **Expanded Authorization Label** (for reporting purposes; ***not*** visible to participants) • **Section Label(s)*** • **Section body** (markdown/HTML friendly)* • **Add/Removing Sections*** • **Section Declinability*** • **Signature Label*** • **Signature Requirement*** • **Relationship Requirement*** • **Add/Removing Signatures*** • **Required/Optional** • **Expiration** • **Sex, Age, and Subgroup Restrictions** • **Authorization-specific Settings**

Question Types

Type	Definition
Form	A **Form** 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.
Immunizations	In the **Immunizations** module, participants either upload their immunization dates via an upload, or input them manually.
Medications	The **Medications** module collects scheduled medications from participants by asking a series of questions (below). 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. • **Does [participant's first name] take medications?** IF YES: • **Medication Name** • **Strength** • **Dose Quantity and Form** • **Frequency** • **Times and Dates Given** • **Why does [participant's first name] take this medications?** • **Will [participant's first name] be taking this medication at [organization name]?** **Note**: Just like the **Allergies** Module, the questions within the **Medications** Module cannot be customized.

Question Types

Type	Definition
Over-the-Counter (OTC) Medications	The **OTC Medications** 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.
Select	A **Select** question is a drop-down question with a set list of answers. To create the drop-down list, enter choices separated by commas. Participants can select only one option from the list.
Text	A **Text** question allows for an open-text answer that can be formatted as short answer (default), date, email, large text, number, or phone.
Upload	**Upload** allows 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). Uploads are restricted to .PDF, .JPG, .GIF, and .PNG file types with a maximum size of 5MB.
Yes/No	A **Yes/No** question prompts a ***yes*** or ***no*** answer.
Yes/No + Details	**Yes/No + Details** are **Yes/No** questions, plus 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.

Filter List

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 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
Expiration	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. The **Expiration** bulk edit option prompts an entry for a date on which the question or step expires. 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. 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. For more informations on Expirations, please check out the **Expirations support article**.

Bulk Edit Options

<table>
<tr><th>Type</th><th>Definition</th></tr>
<tr><td>Sex Restriction</td><td>The Sex Restriction bulk edit option displays the question or step by sex assigned at birth (female or male).</td></tr>
<tr><td>Age Restriction</td><td>The Age Restriction bulk edit option displays the question or step based on the age of the participant. Options include:
• As Old or Older Than
• Younger Than</td></tr>
<tr><td>Subgroup Restriction</td><td>The Subgroup Restriction 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.

Note: Multiple subgroups may be selected.</td></tr>
</table>

DOCNETWORK

Builder Layout

Tabs

Active Draftsets

This tab displays active draftsets that are waiting to be applied. Here, you can edit draftset names, make draftsets public/private, and permanently delete draftsets. We recommend only having one active draftset at a time.

Applied Draftsets

This tab displays past draftsets, including the name of the person who applied them and the timestamp of when it was applied. This historical record of applied draftsets can be useful for referencing the last round of changes made in the Health Profile forms.

Live Questionnaire

This tab displays the live questions that a participant sees in their Participant Health Profile forms, depending on their registration(s) and any subgroup restrictions. Here, you can navigate the Health Forms by clicking on any of the steps and questions on the page, export a CSV file of your Health Profile forms, and use Control + F to find a keyword within your Health Profile forms.

Templates

This tab displays the templates available to you. Here, you can create private templates accessible to you only, and view all public templates created within your organizations's questionnaire.

Builder Layout

Editor Panel

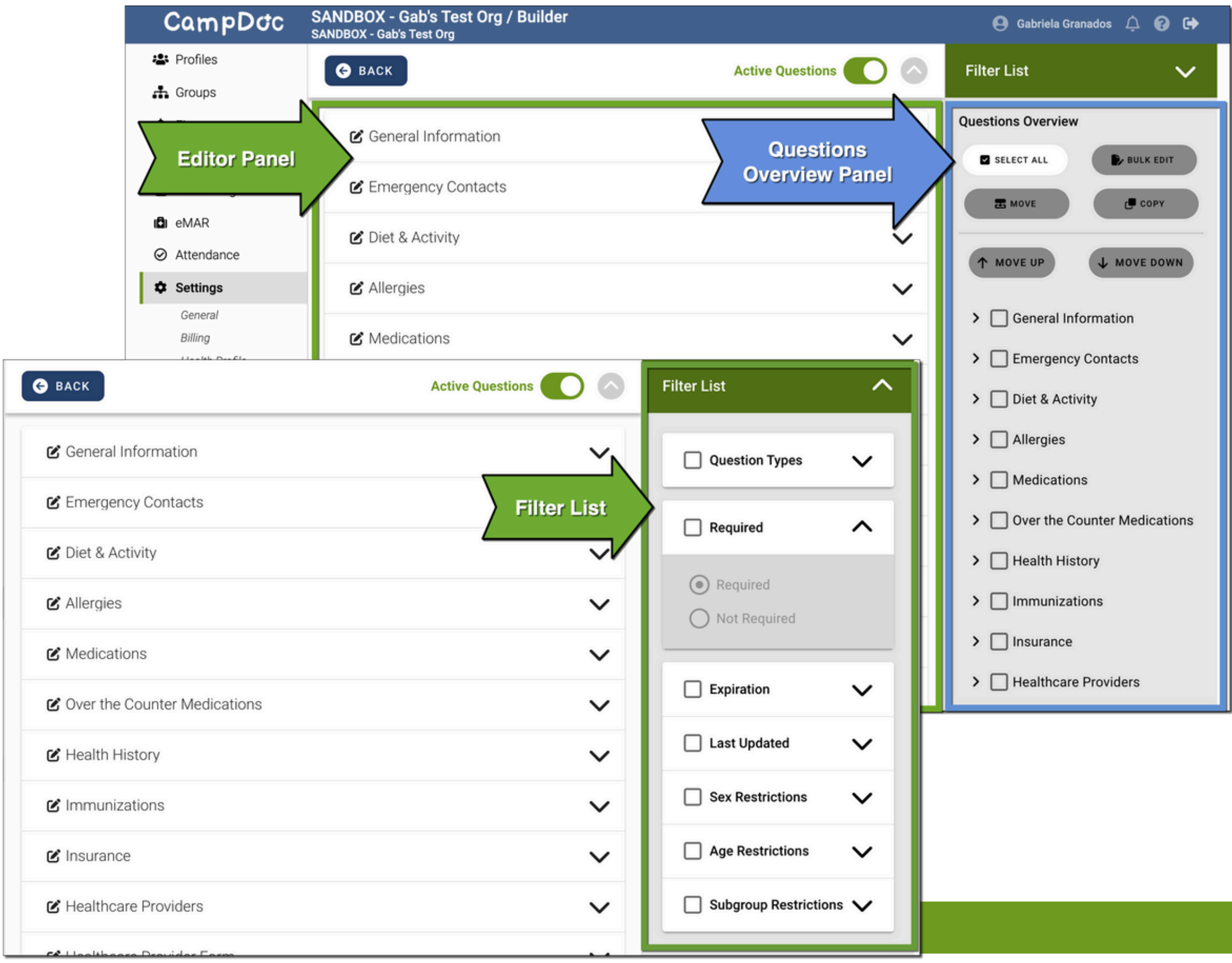
The center **Editor** panel is where you can create steps, and edit, create, and deactivate questions.

Questions Overview Panel

The right-side **Questions Overview** panel is where you can filter, move, copy, paste, and bulk update questions.

Filter List

The right-side **Filter** List is where you can apply filters to narrow down the list of questions you can view.



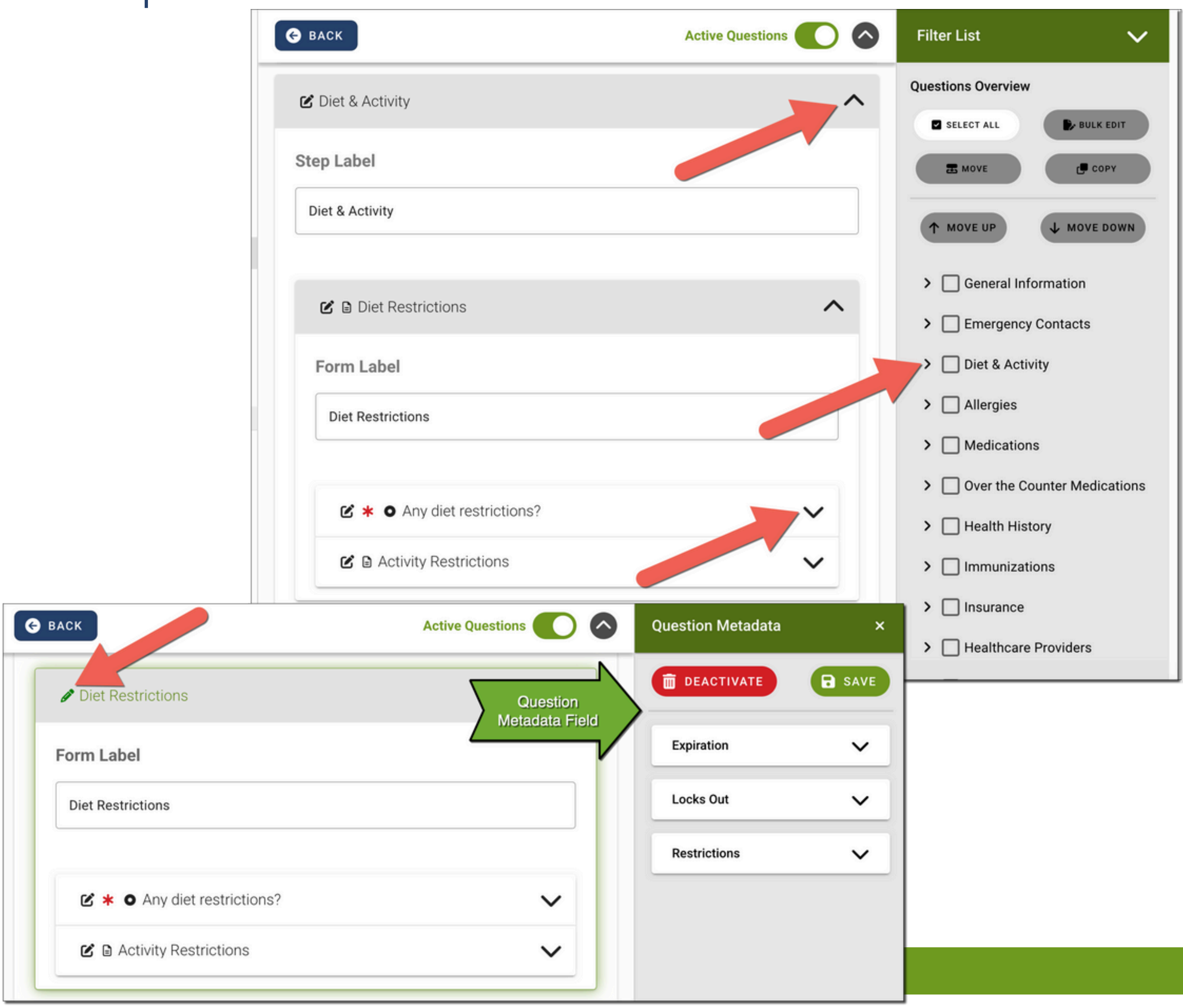
Builder Layout

Question Metadata Field

The right-side **Question Metadata** field is activated when you select to edit a question or subquestion. You can set an expiration and/or lockout date, apply restrictions, and create translations.

Collapse/Expand

You can collapse and expand steps, questions, and forms (form headers) within the Editor panel and Questions Overview panel.



Draftsets

How to Create a New Draftset

1. Navigate to **Settings > Builder**. The **Active Draftsets** tab will be the default view.
2. Click **+ Create New** button.
3. Enter your draftset name.
4. Adjust the toggle to **public**.
5. Click **Save** to add your draftset to the **Active Draftsets** tab.

Step-by-step Video:
How to Create a New Draftset

How to Edit a Draftset

1. From the **Active Draftsets** tab, locate the draftset.
2. Click the **vertical ellipsis** (*kebab icon*) for options.
3. Do one of the following, depending on whether you want to **edit the draftset name**, **adjust view permissions**, or **permanently delete** a draftset:
   a. To edit a draftset name, select **Edit Name**, and enter the new title.
   b. To adjust view permissions, select **Make Public/Make Private**.
   c. To permanently delete a draftset, select **Delete Draftset**.

Step-by-step Videos:
How to Edit a Draftset Name
How to Delete a Draftset

Draftsets

How to Manage a Draftset

Click the draftset title to open and manage the draftset. Once in the draftset, you can make changes to steps, questions, and sub questions.

How to Apply a Draftset

Once you are finished making changes within a draftset, you need to apply the draftset to publish the changes in the live Health Profile form.

1. Identify the draftset you want to apply.
2. Click the green **Apply Draftset** button.

Important: **This action is permanent and will take effect immediately for participants.** Applying a draftset will directly affect the current setup of your account. Any changes made to the assigned Health Profile form version will automatically be visible to participants. This may impact their profile completion status and overall completion percentage

Step-by-step Video:
How to Apply a Draftset

Steps & Questions

How to Create a Step

1. Click the draftset name to open and manage the draftset.
2. Click the **+ Create** button at the bottom of the Builder.
3. Select **Step**.
4. Title the step. This is what the step will be named in the Builder and from the participant's point of view.
5. Click **Save**. The new step will automatically be placed at the bottom of the draftset.

Step-by-step Video:
How to Create a Step

How to Edit a Step

Click the *edit icon* next to the step. The following editing options will become available:

- **Step Label**: Update the title of the step.
- **Deactivate Step**: Remove the step from the questionnaire, making it unavailable to participants. ***If a step is deactivated, the questions within the step will also be deactivated***.
- **Expiration**: Add or modify the expiration date, which will prompt returning participants to confirm that their previously entered answers on the step are up to date before the step will be marked as complete.
- **Locks Out**: Set or adjust this date to prevent participants from answering or changing answers for all questions within the step.
- **Sex Restrictions**: Add or edit sex-based restrictions, allowing only male or female participants to view or respond to the step.
- **Age Restrictions**: Add or modify age limits for who can access the step.
- **Subgroup Restrictions**: Add or adjust subgroup restrictions to control which group(s) of participants can view or interact with the step.

Steps & Questions

How to Create a Question Inside a Step

1. Click the draftset name to open and manage the draftset.
2. Click the *edit icon* next to the step within which you want to add a question.
3. Click the **+ Create** button at the bottom of the Builder.
4. Select **Inside**.
5. Select the **Question Type** from the dropdown list. *See **Question Types** above for a description of each question type.*
6. Enter the **Question Label**. This is how the question will appear in the Builder and from the participant's point of view.
7. Click **Save**.

Step-by-step Video:
How to Create a Question Inside a Step

Steps & Questions

How to Create a Question Under a Question

Creating a question under a question will allow you to place the new question directly underneath an existing question.

1. Click the draftset name to open and manage the draftset.
2. Click the *edit icon* next to the question under which you want to add a question.
3. Click the **+ Create** button at the bottom of the draftset.
4. Select **Under**.
5. Select the **Question Type** from the dropdown list. *See **Question Types** above for a description of each question type.*
6. Enter the **Question Label**. This is how the question will appear in the Builder and from the participant's point of view.
7. Click **Save** to add the question.

Step-by-step Video:
How to Create a Question Under a Question

Steps & Questions

How to Create a Sub Question

Sub questions are follow-up questions based on conditions set by an initial question. Once a question is created, you can design sub questions to appear based on participant responses to the initial question. Sub Questions can be created when there are set answers to the initial question (yes/no, select, the Allergies and Medication modules, or an Authorization that can either accepted or declined).

1. Click the draftset name to open and manage the draftset.
2. Click the *edit icon* next to the question within which you want to add a sub question.
3. Click the **+ Create** button at the bottom of the draftset.
4. Select **Inside**.
5. Select the **Question Type** from the dropdown list. *See **Question Types** above for a description of each question type.*
6. Enter the **Question Label**. This is how the question will appear in the Builder and from the participant's point of view.
7. Click **Save** to add the sub question.
8. Update the condition if needed. **Note**: *By default, the sub question will show when the answer is **yes** to Yes/No questions.*
9. Click **Save**.

Step-by-step Video:
How to Create a Sub Question

Steps & Questions

How to Edit a Question

Click the *edit icon* next to the question. The following editing options will become available:

- **Question Label**: Update the question that the participant sees.
- **Deactivate Question**: Remove the question from the questionnaire, making it unavailable to participants.
- **Expiration**: Add or modify the expiration date, which will prompt returning participants to reanswer if their previous answer was entered prior to the expiration date.
- **Sex Restrictions**: Add or edit sex-based restrictions, allowing only specific genders to view or respond to the question.
- **Age Restrictions**: Add or modify age limits for who can access the question.
- **Subgroup Restrictions**: Add or adjust subgroup restrictions to control which participants can view or interact with the question.

Move, Copy, & Paste

How to Move a Step or Question Up or Down

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 the Move Up/Move Down functionality.

1. In the right-side **Questions Overview** panel, find the step or question you want to move up or down.
2. Click the checkbox next to the step or question to enable the **Move Up/Move Down** functionality.
3. Select the **Move Up** or **Move Down** button depending on where you want to move the step or question.
4. Click **Save**.

Step-by-step Video:
How to Move Up / Move Down

Move, Copy, Paste

How to Move a Question Under a Question

The **Move Under** functionality is used to relocate questions and sub questions (if applicable) to a new location across steps. Relocate a question by first selecting it in the **Questions Overview** panel to activate **Move**, then selecting the question under which you want to move the selected question.

1. In the right-side Questions Overview panel, find the question you want to move under another question.
2. Click the checkbox next to the question to activate the **Move** functionality.
3. Click the **Move** button.
4. Click the checkbox next to the question under which you want to move the selected question (*i.e. question selected in Step 2*).
5. Click the **Move Under** button.
6. Click **Save**.

Step-by-step Video:
How to Move Inside / Move Under

Move, Copy, Paste

How to Move a Question Inside a Step

The **Move Inside** functionality is used to relocate questions and sub questions (if applicable) to a new location within steps. Relocate a question by first selecting it in the **Questions Overview** panel to activate **Move**, then selecting the step within which you want to move the selected question.

1. In the right-side **Questions Overview** panel, find the question you want to move inside a step.
2. Click the checkbox next to the question to activate the **Move** functionality.
3. Click the **Move** button.
4. Click the checkbox next to the step within which you want to move the selected question (*i.e. question selected in Step 2*).
5. Click the **Move Inside** button.
6. Click **Save**.

How to Move a Question Inside a Question

The **Move Inside** functionality can also be used to relocate a question inside another question (i.e. to create a sub question). Relocate a question by first selecting it in the **Questions Overview** panel to activate **Move**, then selecting the question within which you want to move the selected question. After clicking **Move Inside**, update the condition if needed. *By default, the sub question will show when the answer is **yes** to Yes/No questions.*

Move, Copy, Paste

How to Copy and Paste a Question or a Question + Sub Question

The **Copy and Paste** functionality is used to quickly create new questions and sub questions (if applicable) with the same type or format as an existing question, rather than creating an entire new question from scratch. Copy and paste a question by first selecting it in the **Questions Overview** panel to activate **Copy**, then selecting the destination question within or under which you want to paste the selected question.

1. In the right-side **Questions Overview** panel, click the checkbox next to the question or question + nested sub questions you want to copy.
2. Click the **Copy** button. The question (or question + sub question) is now placed in the **Queue**.
3. Click the checkbox next to the question where you want to paste the copied question or question + sub question [*i.e. question(s) selected in Step 1*].
4. Do one of the following depending on whether you want to paste the question or question + sub question ***inside*** or ***under*** the selected question:
   a. Click the **Paste Inside** button to place the selected question or question + sub question as a sub question nested *within* the destination question.
   b. Click the **Paste Under** button to place the selected question or question + sub question *beneath* the destination question.
5. Click **Save**.

Move, Copy, Paste

How to Copy and Paste Multiple Copies

You also have the option to create multiple copies of a question or a question and its sub question(s). There is no limit to the number of times you can paste a question or sub question to a new location.

1. In the right-side **Questions Overview** panel, click the checkbox next to the question or question + nested sub questions you want to copy.
2. Click the **Copy** button. The question (or question + sub question) is now placed in the **Queue**.
3. In the Queue, locate Paste Multiple and increase the number of copies to your desired amount.
4. Click the checkbox next to the question where you want to paste the copies.
5. Do one of the following depending on whether you want to paste the copies ***inside*** or ***under*** the selected question:
    a. Click the **Paste Inside** button to place the multiple copies as sub questions nested *within* the destination question.
    b. Click the **Paste Under** button to place the multiple copies *beneath* the destination question.
6. Click **Save**.

Bulk Edits

Overview

Questions and Steps can be updated in bulk using the right-side **Questions Overview** panel. Bulk edit options include:

- Expiration
- Sex Restriction
- Age Restriction
- Subgroup Restriction

*See **Bulk Edit Options** above for a description of each option.*

How to Make a Bulk Edit

1. Click the draftset name to open and manage the draftset.
2. In the right-side **Questions Overview** panel, select the questions or steps you want to update in bulk.
3. Click the **Bulk Edit** button.
4. Select the **Bulk Edit Option** from the dropdown list.
    - If selecting ***Expiration***:
        - Enter the expiration date by selecting the date on the calendar icon or typing the date.

Step-by-step Video:
How to Make a Bulk Edit (Expirations)

Bulk Edits

How to Make a Bulk Edit (continued)

- If selecting ***Sex Restriction***:
  - Select one option: *Male* or *Female*
- If selecting ***Age Restriction***:
  - Select one option: *As Old or Older Than*, or *Younger Than*
  - Enter the age (in years)
- If selecting ***Subgroup Restriction***:
  - Select the subgroup(s) from the dropdown list. *Multiple subgroups may be selected.*

Step-by-step Video:
How to Make a Bulk Edit (Sex Restriction)

Step-by-step Video:
How to Make a Bulk Edit (Age Restriction)

Step-by-step Video:
How to Make a Bulk Edit (Subgroup Restriction)

DOCNETWORK

Deactivated Questions

Overview

Deactivated questions are questions that are no longer active but that have ***not*** been permanently deleted. You are able to view and restore deactivated questions.

How to Deactivate Questions

1. Click on the **Edit** icon next to the question you want to deactivate. The right-side question metadata field will activate.
2. To deactivate an existing question, click **Deactivate**.
3. To deactivate a question that is a draft, click **Discard Draft**.

How to View Deactivated Questions

1. Adjust the **Active Questions** toggle located at the top of the questionnaire. In this view, you will be able to see all **deactivated steps** and their corresponding questions.

Deactivated Questions

How to Restore Deactivated Questions

Once you have adjusted the **Active Questions** toggle at the top of the questionnaire, you can manage the deactivated questions via the following options:

Option A. Move to Active Questions:

Option A allows you to restore a deactivated question, including its previously entered answer data.

1. In the **Questions Overview** panel, select the deactivated question you want to restore.
2. Click the **Reactivate** button. The question is now placed in the **Queue**.
3. Adjust the **Deactivated Questions** toggle at the top so that you can view all activated steps and questions.
4. Select the question or step inside or under which you want to ***place*** the reactivated question.
5. Click the **Place Inside** or **Place Under** to move the deactivated question back into the active question pool. **Note**: *Once a deactivated question is restored, a profile's previously entered answer data will be restored.*

Deactivated Questions

How to Manage Deactivated Questions

Option B. Copy to Active Questions:

Option B allows you restore a deactivated question by making a copy of it. **Please note**: this option does ***not*** restore the previously entered answer data like in **Option A**.

1. In the **Questions Overview** panel, select the deactivated question you want to restore.
2. Click the **Copy** button. The question is now placed in the **Queue**.
3. Adjust the **Deactivated Questions** toggle at the top so that you can view all activated steps and questions.
4. Select the question or step inside or under which you want to ***paste*** the reactivated question.
5. Click the **Paste Inside** or **Paste Under** to paste the deactivated question back into the active question pool.

Step-by-step Video:
How to Manage Deactivated Questions

Templates

Overview

You are able to use all public templates that were created based on your organization's questionnaire. You may add one of the public templates to the bottom of your existing forms (current live questionnaire). Using templates allows you to quickly copy questions found within your questionnaire instead of creating them from scratch.

Note: Templates are added to the bottom of the current live questionnaire; templates do ***not*** replace the existing questionnaire.

1. Start in the **Active Draftsets** tab.
2. Click **+ Create New** button.
3. Enter your draftset name.
4. Adjust the toggle to **public**.
5. Select the desired template from the **Template** dropdown list.
6. Click **Save**.
7. Click the draftset name to open and manage the draftset. **You will notice that the template is added to the bottom of the current live questionnaire.*
8. Make your desired edits.
9. Preview and apply your draftset.

Step-by-step Video:
How to Use Templates