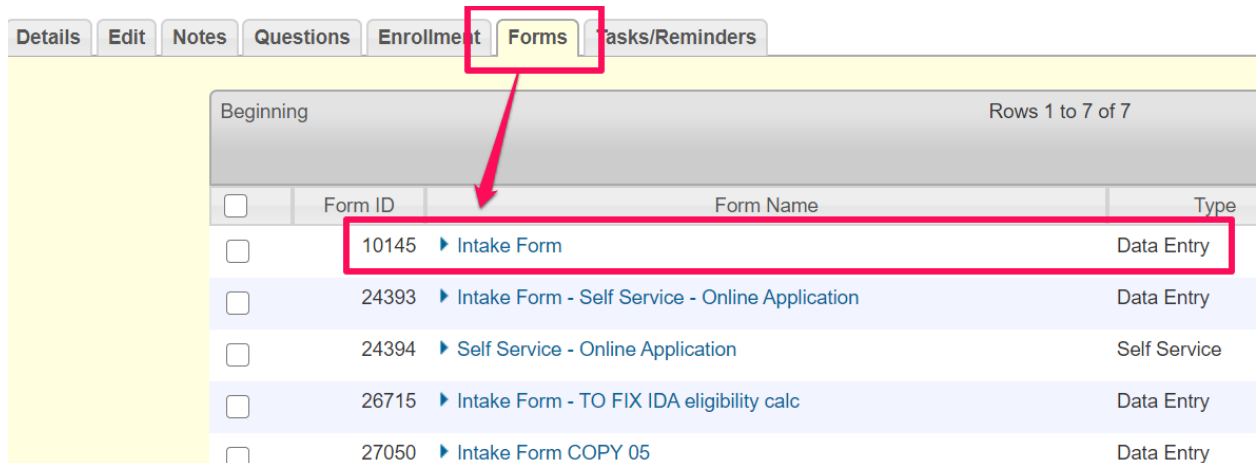


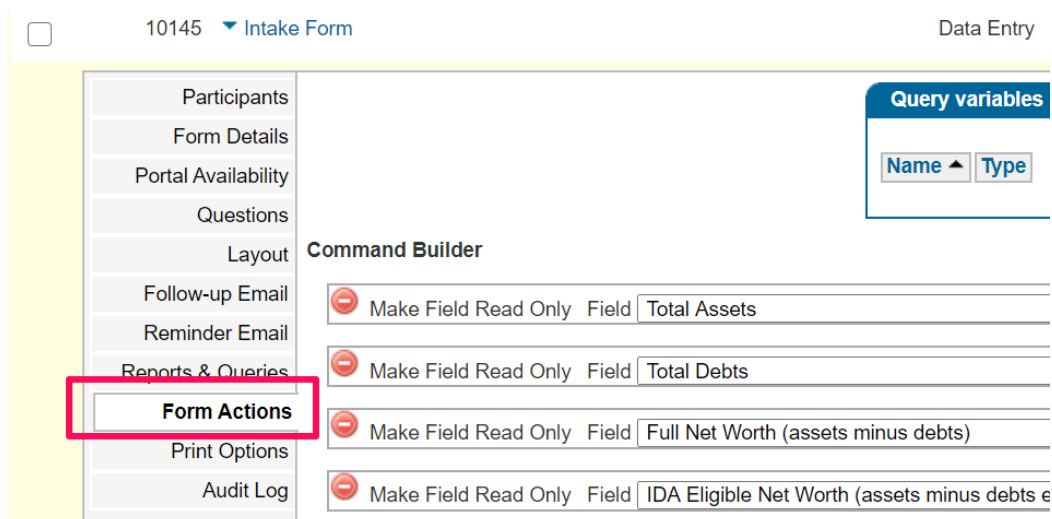
How to hide questions in your Intake Form

1. Log into Outcome Tracker.
2. Click Activities Tab.
3. Find the IDA Application Profile activity (by scrolling down or using the search tool).
4. Click the Forms tab
5. Click Intake Tab - Data Entry



Beginning Rows 1 to 7 of 7			
<input type="checkbox"/>	Form ID	Form Name	Type
<input type="checkbox"/>	10145	▶ Intake Form	Data Entry
<input type="checkbox"/>	24393	▶ Intake Form - Self Service - Online Application	Data Entry
<input type="checkbox"/>	24394	▶ Self Service - Online Application	Self Service
<input type="checkbox"/>	26715	▶ Intake Form - TO FIX IDA eligibility calc	Data Entry
<input type="checkbox"/>	27050	▶ Intake Form COPY 05	Data Entry

6. Click Form Actions tab. (You will see a long list of Form Actions or instructions. These form actions tell your Intake Forms what to do when or before data is entered. For example, give a warning message when a field is left blank.)



☐ 10145 ▶ Intake Form Data Entry

Participants
Form Details
Portal Availability
Questions
Layout
Follow-up Email
Reminder Email
Reports & Queries
Form Actions
Print Options
Audit Log

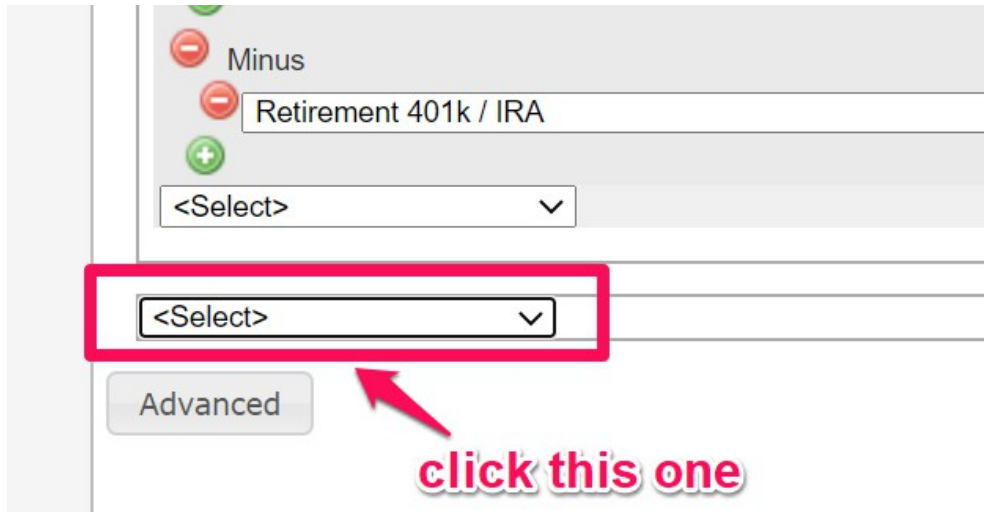
Query variables

Name ▲ Type

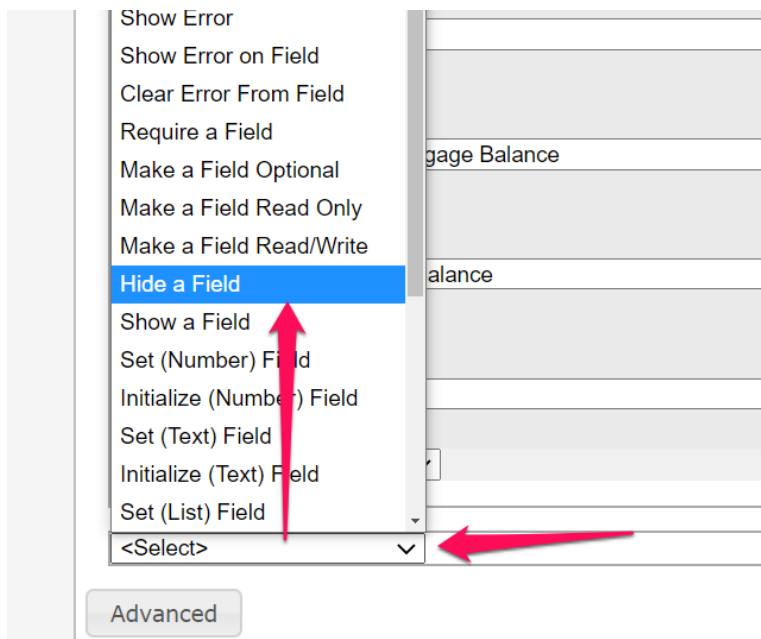
Command Builder

- Make Field Read Only Field Total Assets
- Make Field Read Only Field Total Debts
- Make Field Read Only Field Full Net Worth (assets minus debts)
- Make Field Read Only Field IDA Eligible Net Worth (assets minus debts e

7. Scroll down until you get to the end of the list of Form Actions.



8. Click the dropdown field with the <select> text in it and select “Hide Field.” (IMPORTANT: Make sure to click the last one.)



9. A new dropdown will appear. Select the field you would like to hide.
10. Repeat steps 8 and 9 until done.
11. Click “Save.”

If you have a self-service form (an online form you send to IDA applicants), then you will also need to update this version of the IDA intake form.

1. Follow steps 1 through 4 above.
2. Instead of selecting Intake Tab – Data Entry, select Intake Tab – Self Service

3. Then proceed with steps 6 through 11.