

FAQ Summary

1. Q: Can you enroll customers into multiple programs? Is there any restriction to the maximum # of programs that can be assigned per customer?
A: Yes, customers can be enrolled into multiple programs. There are no restrictions.
2. Q: Who can create a new option for Program Selections in ATLAS?
A: This is restricted to ADMIN access. If you identify a program that is missing, just contact your ATLAS ADMIN to request an additional program addition.
3. Q: What type of users are authorized to add Programs under Program Selections in ATLAS?
A: This function is restricted to ATLAS ADMIN. Users in your region.
4. Q: Can you select multiple files to upload in ATLAS?
A: Yes, you can perform a multi-file upload by hitting shift or CTRL to select multiple files.
5. Q: When the document is uploaded, is it auto converted to PDF in ATLAS?
A: Yes, we also have auto file conversions built in ATLAS. For example, when using PDF fillable forms or images, ATLAS can flatten the file.
6. Q: Does the Forms Builder have branching logic?
A: Yes, this feature is built-in to our ATLAS Forms Builder.
7. Q: Do you have restrictions on the number of forms that can be created using forms builder?
A: There are no restrictions.
8. Q: Does the system save data as the customer is completing/entering a form?
A: The Forms Builder has recursive technology with up to the minute key stroke, so no data is ever lost when completing forms.

9. Q: Who do we reach out to if we need assistance for creating Forms inside ATLAS?

A: We have a new service that launched back in June of 2023 ATLAS Elevate, which for an additional fee can assist your region in building out/creating forms inside ATLAS. If you are interested and want to learn more, please reach out to our support team, or project management team and they can assist with routing you to the right person for pricing.

10. Q: We saw the ATLAS logo on the top center of the form, can you customize to add your region's logo on the top of the forms?

A: Yes, customer headers and footers can be created inside ATLAS. If you have any questions, please reach out via support ticket, or email us. We must add the header/footer in the system before they can be affixed to a particular form(s).

11. Q: Using the staff to alert form option inside ATLAS, can you alert multiple staff at the same time? If so, how are staff alerted? Where does the information appear? A: Yes, multiple staff can be alerted to forms completion. The ATLAS alert will be sent to ATLAS users via email with the subject line "ATLAS Alert" subject line.

12. Q: When is the form considered complete/done? Once this occurs, what action is triggered in ATLAS? Are electronic signatures automatically applied? Does it get auto filed in the customers profile?

A: Form is completed when staff finally approve and result as completed in manage forms section. For a regular form, non-workflow forms this will trigger, adhering the electronic signatures and creating a PDF flat files to the customers record. If this is a form using Workflow, once the final reviewer approves the form(s), this results as completion, signatures affixed, and PDF flat file created.

13. Q: Who can create workflows in ATLAS?

A: This function is restricted to ATLAS ADMIN. Users in your region.

14. Q: On workflow form, if one of the reviewers denies the form, who does the form kick back to? How does the review process start over?

A: If a reviewer at any level denies the form, ATLAS routes back to the originator of the form/workflow. The form would have to be resent to trigger the process again.

15. Q: When will the new SMS inside ATLAS v4 be ready to implement? Are you looking for regions that want to pilot this new integrated feature?

A: ATLAS team is in the current testing phase; we will be looking for a region to pilot soon. If you are interested, please reach out to our PM's.

16.Q: Can you set an SMS task for advance dates in ATLAS?

A: Yes, you can create tasks for future dates, using the task calendar function you can set this up based on your specific needs.

17.Q: Can SMS task be sent out to my entire caseload?

A: Yes, by selecting this option you can send SMS to your entire caseload.

18.Q: What are the dates for future ATLAS Live Stream events?

A: Please see below for calendar future dates.



19.Q: How can I access today's ATLAS Live Stream?

A: Through the same link that was utilized to access the LiveStream, you can view the recording at:

[ATLAS 4 | Livestream - 01/09/2024 @ 3:00 pm EST \(youtube.com\)](https://www.youtube.com/watch?v=...)