

A2J Author[®]

New User Training

Multiple Choice Questions & Checkboxes



Multiple Choice Questions & Checkboxes

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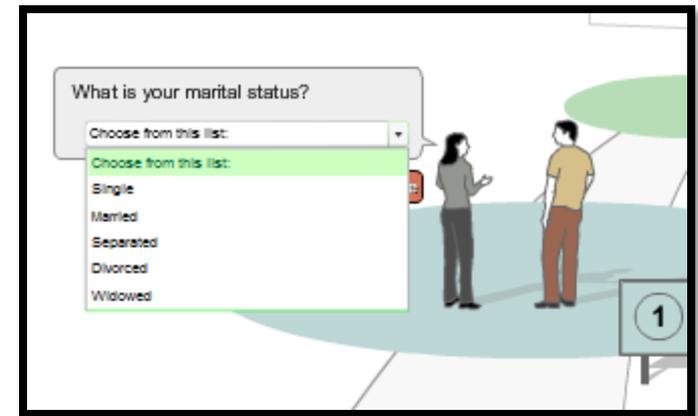
What are Multiple Choice Variables?

Definition

Multiple Choice variables are used to collect a **single value** from a set of options.

Multiple Choice variables can be presented to the end-user as a series of **radio buttons** or as a **drop down text list**.

The “Multiple Choice” variable type is automatically assigned to Radio Button fields and “Text (Pick from list)” fields by A2J Author.



What are Multiple Choice Variables?

Question Design Window

Question

Fields

Children:

Buttons

Type: Number (Pick from list)

Label: Children:

Variable: Number of Children NU

Default value:

Order List: Ascending

Validation: User may leave blank
 User must fill in

Limit values

Min value: 0

Max value: 9

HotDocs Templates:

Variables:

Used	Name	Type	Repeat
1	Citizenship status MC	Multiple Choice	F
1	Client first name TE	Text	F
1	Client last name TE	Text	F
1	Client middle name TE	Text	F
1	Legal issue emolvement TF	True/False	F
1	Legal issue foreclosure TF	True/False	F
1	Legal issue gov benefits TF	True/False	F
1	Legal issue landlord TF	True/False	F
1	Marital status MC	Multiple Choice	F
1	Number of Children NU	Number	F
1	Over 18 TF	True/False	F

Keep in Mind

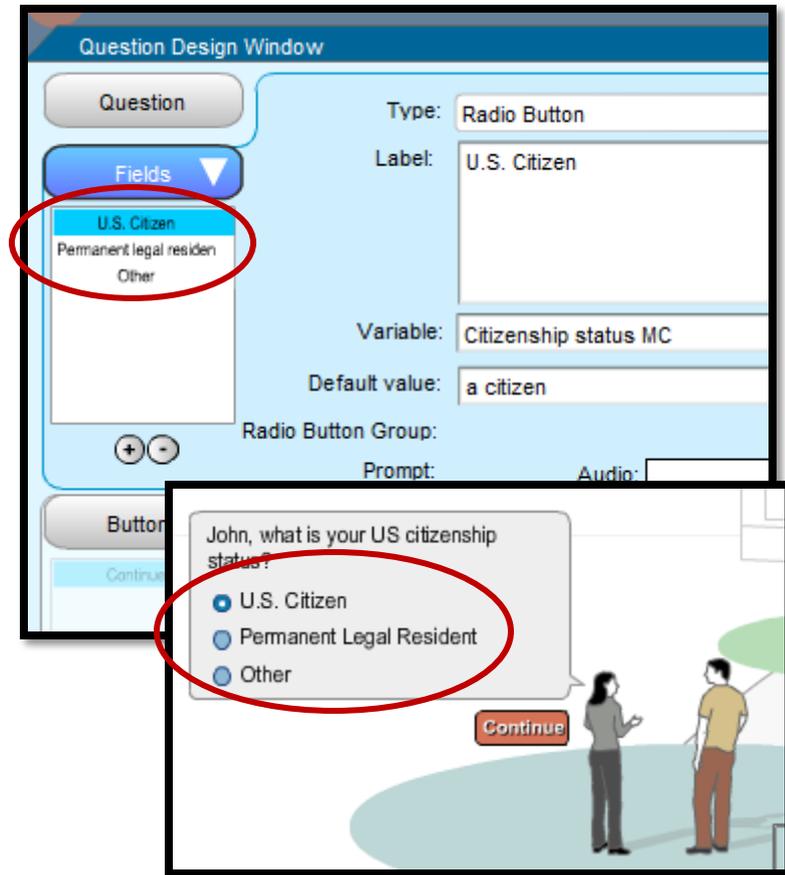
“Number(Pick from list)” variables are **not** Multiple Choice variables.

While “Number (Pick from list)” presents end-users with a set of options, typically the value collected will be needed in a calculation, therefore it is designated as a number variable.



Setting up Multiple Choice Questions

Radio Buttons



Set up a Field for **each** option:

1. Type = Radio Button
2. Label = option displayed to end-users
3. Variable = the **one** Multiple Choice variable that will hold a value chosen by the end user
4. Default Value = value assigned to the Multiple Choice variable if chosen by the end-user

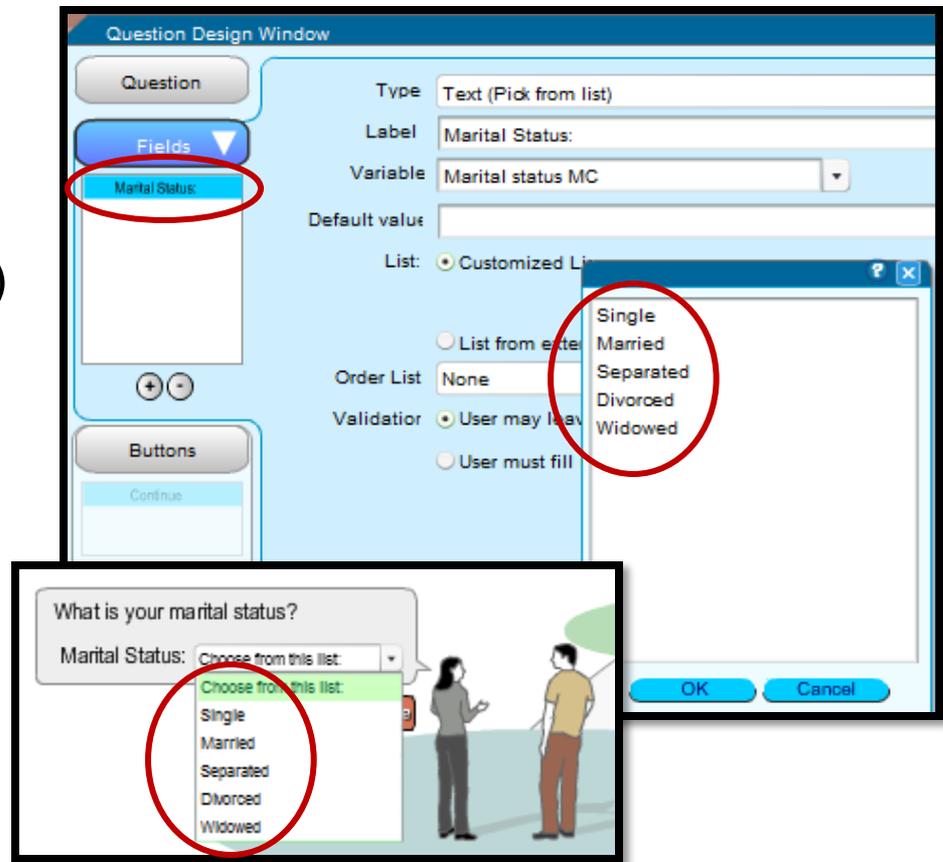


Setting up Multiple Choice Questions

Drop Down List

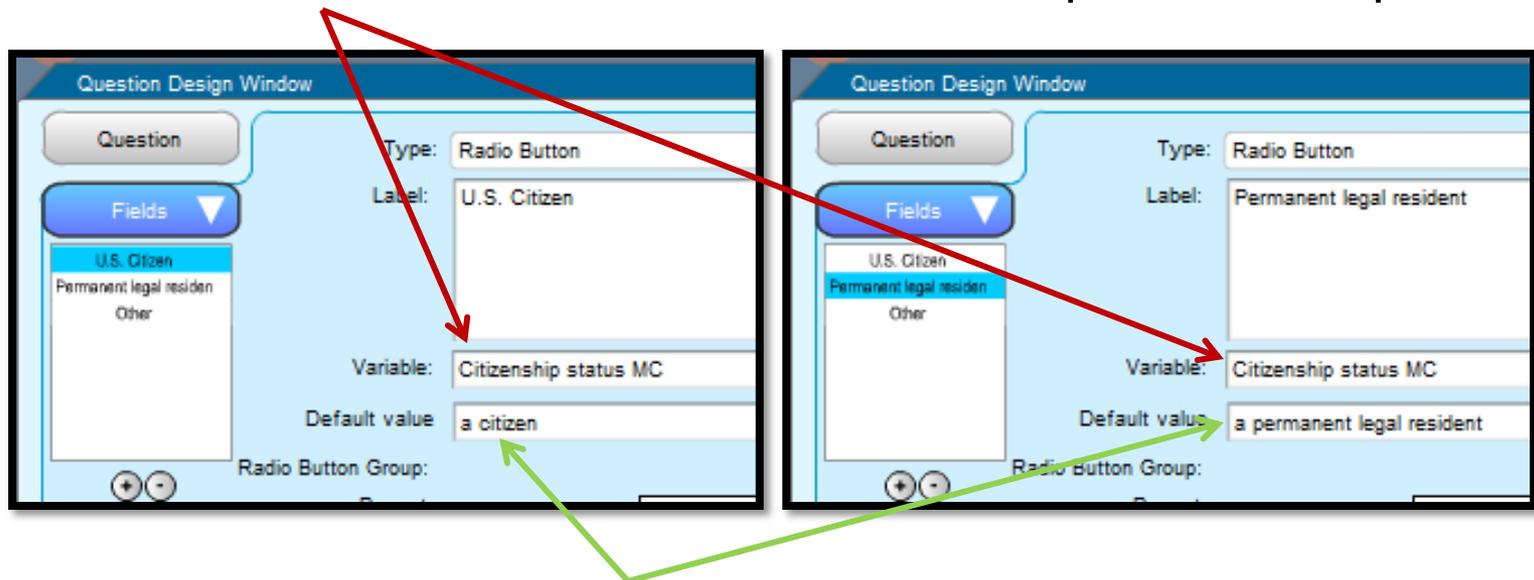
Set up **one** Field with an option list:

1. Type = Text(Pick from list)
2. Label = Field label displayed to end-users
3. Variable = the **one** Multiple Choice variable that will hold a value chosen by the end user
4. Default Value = value assigned to Multiple Choice variable unless something else is chosen



Setting up Multiple Choice Questions

The key to creating Multiple Choice questions in A2J Author® is to create **one variable** to which the set of options correspond.



Each **option** has a **unique value** and when selected that value is passed to the one Multiple Choice variable.



A2J Author[®] Multiple Choice Variables & HotDocs[®]

Corresponding with HotDocs[®]

Multiple Choice variables in A2J Author[®] correspond with Multiple Choice variables in HotDocs[®], where only one value can be selected.

The one value selected via a radio button or a drop down list is passed to HotDocs via the Multiple Choice variable (i.e. “Marital status MC”).

The screenshot shows the 'Question Design Window' in A2J Author. On the left, a 'Fields' list contains 'U.S. Citizen', 'Permanent Legal Reside', and 'Other'. The main area shows a 'Radio Button' configuration with 'U.S. Citizen' as the label and 'Citizenship status MC' as the variable. The default value is 'a citizen'. A callout box on the right displays the HotDocs conditional logic for this variable:

```
Citizenship Status: «Client first name TE» is «Citizenship status MC»  
«IF Citizenship status MC = "a citizen"»  «ELSE»  «END IF» U.S. Citizen  
«IF Citizenship status MC = "a permanent legal resident"»  «ELSE»  «END IF» Resident  
«IF Citizenship status MC = "neither a citizen nor a permanent legal resident"»  «ELSE»  «END IF» Other
```



A2J Author[®] Multiple Choice Variables & HotDocs[®]

HotDocs[®] RTF v. PFD

Whether the HotDoc is an RTF or a PDF, the **variable type** for a question where the end-user can only select one option is **Multiple Choice** in A2J Author and HotDocs.

Difference Between RTF & PDF

RTF: The Multiple Choice variable is used in an IF statement to determine whether to display a checked box

PDF: HotDocs Automator function is used to group all of the options, identify the associated Multiple Choice variable, and assign the possible values for the options.

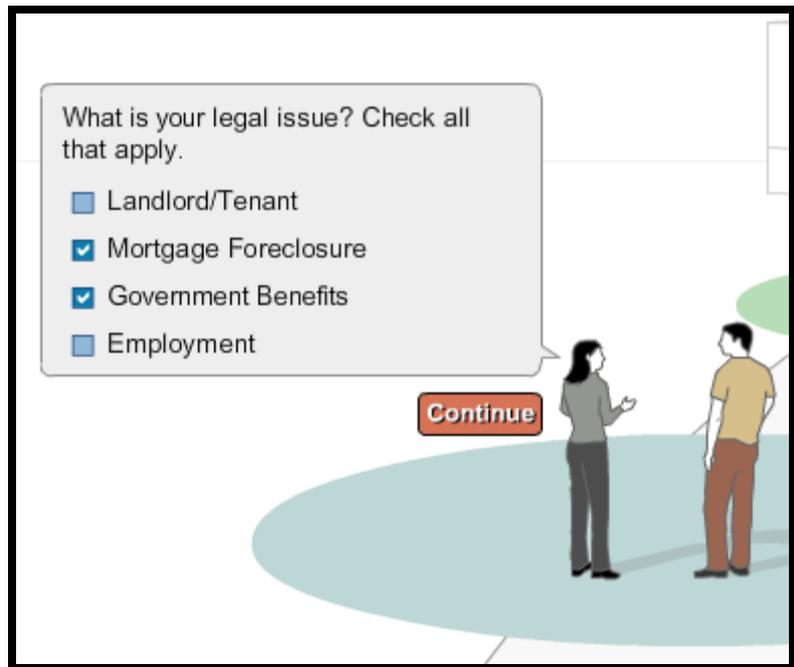


What are Checkboxes? (if not multiple choice)

Definition

Checkboxes are a set of True/False variables, when an option is selected the associated TF variable is set to True.

A set of Checkboxes allows the end-user to select **more than one option**, whereas Multiple Choice variables are used to collect a single option (value).



Setting Up a Checkbox Question

Set up a Field for **each** option:

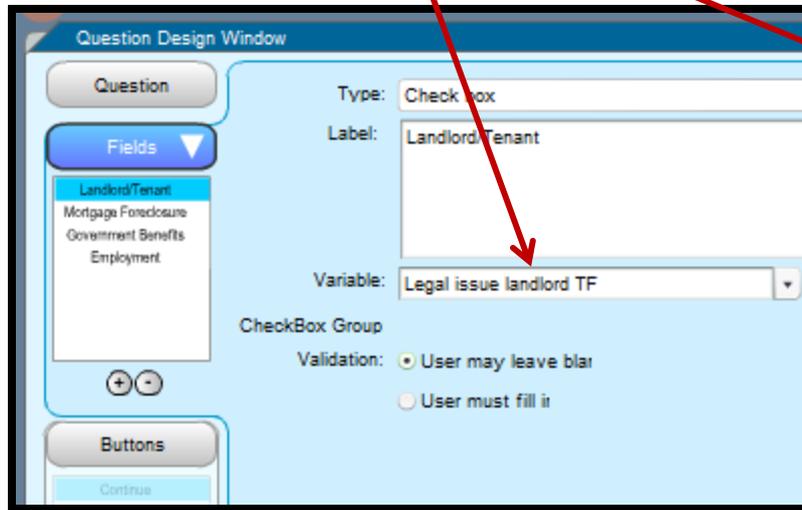
1. Type = Check box
2. Label = option displayed to end-users
3. Variable = the True/False variable that will hold a value of “True” if chosen by the end user or “False” if not

The image shows two screenshots related to setting up a checkbox question. The top screenshot is the 'Question Design Window' interface. It has a 'Fields' dropdown menu on the left with a red circle around the 'Landlord/Tenant' option. The main area shows the question configuration: 'Type' is 'Check box', 'Label' is 'Landlord/Tenant', and 'Variable' is 'Legal issue landlord TF'. There are also options for 'Validation' (User may leave blank or User must fill in) and 'Buttons' (Continue). The bottom screenshot is a preview of the user interface. It shows a question: 'What is your legal issue? Check all that apply.' with four options: 'Landlord/Tenant', 'Mortgage Foreclosure', 'Government Benefits', and 'Employment'. The 'Mortgage Foreclosure' and 'Government Benefits' options are checked. A 'Continue' button is at the bottom right. The background shows two people talking.

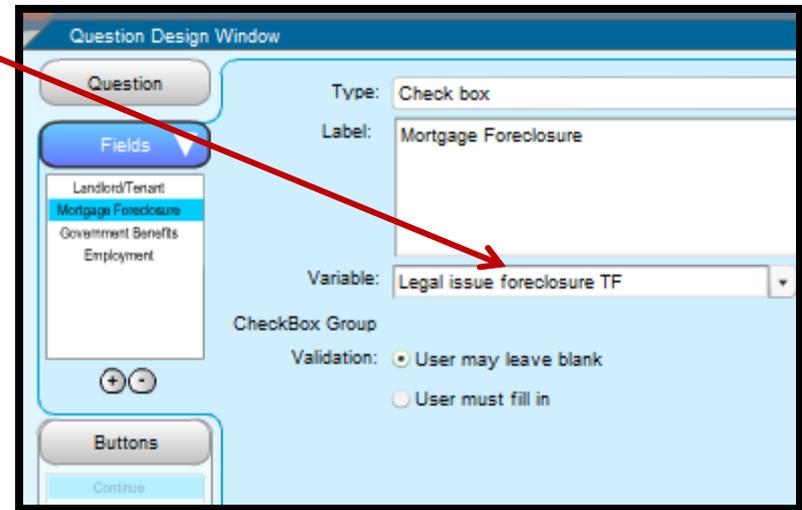


Setting up a Checkbox Question

The key to creating Checkbox questions in A2J Author[®] is to create **multiple True/False variables** to which each option corresponds.



The screenshot shows the 'Question Design Window' for a 'Check box' question. The 'Label' field contains 'Landlord/Tenant'. The 'Variable' dropdown menu is set to 'Legal issue landlord TF'. The 'Validation' options are 'User may leave blank' (selected) and 'User must fill in'. The 'Fields' list on the left includes 'Landlord/Tenant', 'Mortgage Foreclosure', 'Government Benefits', and 'Employment'. The 'Buttons' section at the bottom has a 'Continue' button.



The screenshot shows the 'Question Design Window' for a 'Check box' question. The 'Label' field contains 'Mortgage Foreclosure'. The 'Variable' dropdown menu is set to 'Legal issue foreclosure TF'. The 'Validation' options are 'User may leave blank' (selected) and 'User must fill in'. The 'Fields' list on the left includes 'Landlord/Tenant', 'Mortgage Foreclosure', 'Government Benefits', and 'Employment'. The 'Buttons' section at the bottom has a 'Continue' button.

A2J Author[®] Checkboxes & HotDocs[®]

Corresponding with HotDocs[®]

Checkbox True/False variables in A2J Author[®] correspond with True/False variables in HotDocs[®].

The value of “True” or “False” is passed to HotDocs via the True/False variable (i.e. “Legal issue landlord TF”) depending on whether the option is selected by the end-user.

Question Design Window

Question

Fields

- Landlord/Tenant
- Mortgage Foreclosure
- Government Benefits
- Employment

Type: Check box

Label: Landlord/Tenant

Variable: Legal issue landlord TF

Validator: User may leave blank

Legal issues: «Client first name TE»'s legal issues are:«IF Legal issue landlord TF»«IF Legal issue foreclosure TF» Foreclosure; «END IF»«IF Legal issue gov benefits TF»«IF Legal issue employment TF» Employment; «END IF»

«IF Legal issue landlord TF» «ELSE» «END IF» Landlord Tenant
«IF Legal issue foreclosure TF» «ELSE» «END IF» Mortgage Foreclosure
«IF Legal issue gov benefits TF» «ELSE» «END IF» Government Benefits
«IF Legal issue employment TF» «ELSE» «END IF» Employment



A2J Author[®] Checkboxes & HotDocs[®]

HotDocs[®] RTF v. PFD

Whether the HotDoc is an RTF or a PDF, the variable type for a question where the end-user can select **multiple options** is a group of True/False variables in A2J Author and HotDocs.

Difference Between RTF & PDF

RTF: The True/False variables are used in an IF statement to determine whether to display a checked box.

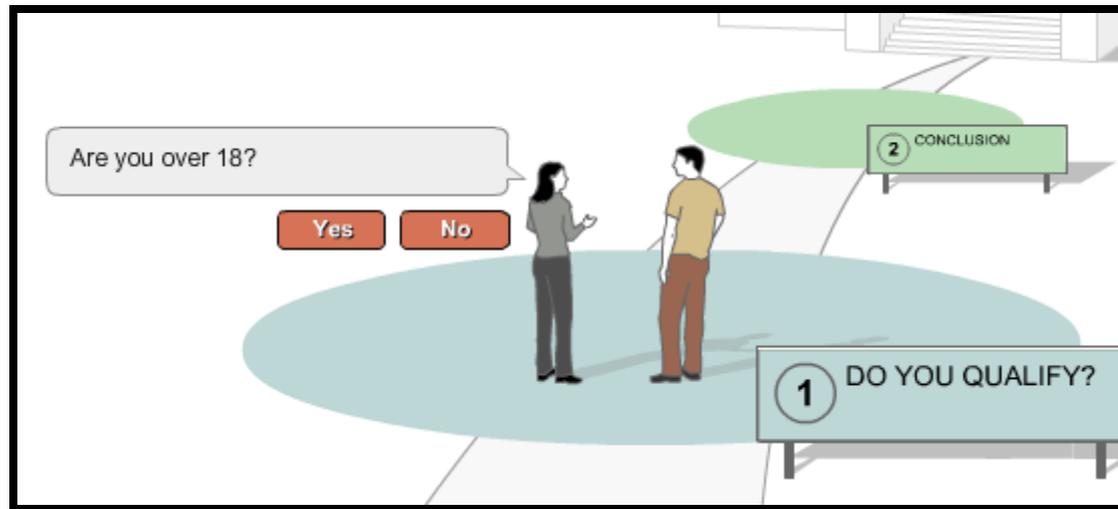
PDF: HotDocs Automator function is used click the box and identify the associated True/False variable.



A2J Author[®] Buttons as Options (instead of radio buttons or checkboxes)

Buttons are another way to check a box on a form.

One True/False variable is set up in A2J Author. When a button is selected the associated value is assigned to the True/False variable.



A2J Author[®] Buttons as Options (instead of radio buttons or checkboxes)

Set up **one** True/False variable.

On the Buttons tab:

1. Label = option displayed to end-users on the buttons
2. Variable = the **one** True/False variable that will hold a value chosen by the end user selecting a button
3. Value = value assigned to the True/False variable if chosen by the end-user

This screenshot shows the configuration for a 'Yes' button. On the left, a mobile device preview shows a button labeled 'Yes' which is highlighted with a red oval. On the right, the configuration panel includes: 'Label: Yes', 'Save the user's button choice (optional)', 'Variable: Over 18 TF' (circled in red), 'Value: True', 'Destination Question: (1)2-Citizenship Status :%%[Client]', and 'Options: Normal'.

This screenshot shows the configuration for a 'No' button. On the left, a mobile device preview shows a button labeled 'No' which is highlighted with a red oval. On the right, the configuration panel includes: 'Label: No', 'Save the user's button choice (optional)', 'Variable: Over 18 TF' (circled in red), 'Value: False', 'Destination Question: (2)2-Do Not Qualify :Sorry, but you', and 'Options: Normal'.



A2J Author[®] Buttons & HotDocs[®]

Corresponding with HotDocs[®]

True/False variables in A2J Author[®] correspond with True/False variables in HotDocs[®].

The value of “True” or “False” is passed to HotDocs via the True/False variable depending on which button the end-user selects.

The image shows a screenshot of the A2J Author interface on the left and a callout box on the right. In the A2J Author interface, the 'Variable' field is set to 'Over 18 TF' and the 'Value' field is set to 'True'. The 'Destination Question' is '(1)2-Citizenship Status :%%[Client'. The callout box shows the HotDocs code: «IF Over18 TF»«Client first name TE» is over18. «ELSE»«Client first name TE» is over18. «ENDIF» Over18. The code is circled in red, and the variable name 'Over18 TF' is also circled in red.

Single Checkbox: select if applicable

«IF Over18 TF»«Client first name TE» is over18. «ELSE»«Client first name TE» is over18. «ENDIF» Over18



Cheat Sheet For RTF Document

Situation	A2J Field & Variable Type	Value displayed if variable is inserted into the RTF:	How to insert Checkbox in HotDocs RTF:
Select one of the following	Field: Radio Buttons → Variable: One MC Variable	The Default Value entered for each Radio Button option entered on the Fields Tab	IF Expression: <<IF Multiple Choice variable MC= Default Value of one option value>> Show [X]
Select all that apply	Field: Checkboxes → Variable: Many TF Variables	True or False	IF Expression: <<IF True/False variable>> Show [X]
Yes or No	Field: No field, use buttons → Variable: One TF Variable Each button holds a value that is assigned to the One TF Variable when the button is selected by the end user Alt: Could similarly use a Text or other variable type	True or False Alt: The Value entered for each button	IF Expression: <<IF True/False variable>> Show [X] Alt: IF Expression: <<IF Text variable TE= Value of one button>> Show [X]



Cheat Sheet For PDF Document

Situation	A2J Field & Variable Type	Value displayed if variable is inserted into PDF:	How to insert Checkbox in HotDocs PDF:
Select one of the following	Field: Radio Buttons → Variable: One MC Variable	The Default Value entered for each Radio Button option entered on the Fields Tab	Group all check boxes and put MC values in options column of MC variable in the order the boxes appear
Select all that apply	Field: Checkboxes → Variable: Many TF Variables	True or False	Double click each checkbox and name it the corresponding T/F Variable set up in A2J Author
One Checkbox	Field: No field, use buttons → Variable: One TF Variable Each button holds a value that is assigned to the One TF Variable when the button is selected by the end user	True or False	Double click the box and name it the T/F Variable set up in A2J Author
Two Checkboxes for Yes and No	Field: No field, use buttons → Variable: One MC Variable Each button holds a value of Yes or No that is assigned to the One MC Variable when the button is selected by the end user	Yes or No	Group the boxes like you would for a MC question, enter “Yes” and “No” as MC value for the options

Helpful Resources

Find more information on adding repeat loops to A2J Guided Interviews in the *A2J Authoring Guide*.

- ❑ **Chapter 5: Variables Tab**

- ❑ Pg. 42 – Definition of Multiple Choice Variables
- ❑ Pg. 45 – Chart of Variable types and properties

- ❑ **Chapter 7: Creating Questions**

- ❑ Pgs. 89-91 – Text(Pick from List)
- ❑ Pgs. 95-97 – Radio Buttons

Download *A2J Authoring Guide* from www.a2jauthor.org.



Questions? Feedback?

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