

Confidential Submissions Visibility Rules

Last Modified on 06/13/2024 11:39 am EDT

Overview

The Confidential Portal allows Confidential users to submit sensitive information without revealing any Personal Identifiable Information (PII). After enabling the Submitter Property, Admins can configure Form sections to show or hide based on the user's input in the **Remain Confidential** section on the Confidential Submission Form by selecting either the **Yes (Confidential)** or **No (Not Confidential)** toggle switches.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions.

Required Information/Setup

You must set up email settings to enable the Submitter property on a Form. Please refer to the Create an Email Setting article.

• Create an Email Setting

For more information on Confidential Portal Submissions, please refer to the Confidential Portal Submissions article.

• Confidential Portal Submissions

After enabling the Submitter Property, Admins can configure Form sections to show or hide based on the user's input in the **Remain Confidential** section on the Confidential Submissions Form. Please refer to the Enable the Confidential Submitter Property article for more information.

• Enable the Confidential Submitter Property

Navigation

1. From the *Home* screen, click on the **Administration** icon.



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Administration Icon

2. From the *Admin Overview* screen, click the **Configurable Forms** tile on the *Views* section.

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3. From the *Admin Configurable Forms* screen, enter a keyword in the **Search** field to narrow the Forms list and select a **Form Name**.



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Admin Configurable Forms screen

Adjust Confidential Submission Visibility Conditions

1. The *Edit Configurable Forms* screen will appear.



Form Element Section

 Select a Field from the Fields section on the Form Element pop-up, and drag and drop a Field onto the Form.





Drag and Drop the Field onto Form

3. Click the **Edit** icon on the **Forms Section**, just above the **Field** you added to the Form in step 2.

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Forms Section

From the *Edit Form Section* pop-up, click the Only If radio button under the Visibility section.



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Only If Radio Button

5. Click the + Add Rules link.

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+ Add Rules Link

6. Click the **Available Components** field and select the **Submitter** property from the dropdown menu.



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Available Components Dropdown Menu

- 7. Click the **Options and Values** field and select one of the following options from the dropdown menu. The **Only If** radio button works as an operator together with the **Available Components** and **Options and Values** fields to create a condition. The Condition must be met for the corresponding field and information to show on the Form.
 - **Confidential:** Selecting **Confidential** will create the condition where the corresponding Field (Contact Number) will appear if the Submitter = Confidential (Yes).
 - Non Confidential: Selecting Non Confidential will create the condition where the corresponding Field (Contact Number) will appear if the Submitter = Non Confidential (No).



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Options and Values Dropdown Menu



Note:

The Submitter value (Confidential or Non Confidential) is based on the **Remain Confidential** *section (Yes or No) when filling out the Form.*



Remain Confidential Section

8. Click the **Done** button to save your changes.