Managing Completed Forms

Last Modified on 01/28/2025 11:46 am EST

1. A patient will be able to submit a form to your practice by accessing the URL, filling out the appropriate fields, and clicking **Submit**.

2. Once the Form is submitted, it will arrive in the Inbox with a purple banner, labeled as a Form.

C @ ADDRESS BOOK COMPOSE P TEXT MESSAGE VIDEO CHAT			■ TYPES *	♦ TAGS *	IIII SPACES +	#A QUEUES +	≎ SORT≁	Search	Q
Form Tue 01/28/25 11:37 AM	🔖 Intake Form				Lau	urie Test Samp	e (1990-12-0	8, Chart # SAJA000001])
to: Form Responses from: Laurie Test Sample (1990-12-08, Ch	Form:Intake Form								
🦪 Send Item	Personal Information								
	First Name	Laurie							
1 Archive	Middle Name	skipped							
Comment	Last Name	Sample							
	Date of Birth	1992-01-02							
Create ROI Request	State	MD							
More	Medical History								
" More	Please enter your medical history. Include as much information as possible.								
	Allergies	None.							
	Do you smoke?	no							
	Do you have a fever	No							
	Please check all that apply	Heart Disease							
	Rate your experience	4/5							
	Upload any necessary images	skipped							
	Sign Here	∂							

3. You can then choose one of the following common actions:

- 'Send Item' to the patient's chart in a connected EHR
- Route to a queue or person under 'Actions'
- Tag the item for another user to take action
- Fax or text to a referral practice or physician