

Managing Completed Forms



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Step 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'.

Step 2:

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

The screenshot shows a software interface for managing patient information. On the left, there is a sidebar with buttons for 'SEND ITEM', 'COMMENT', 'ARCHIVE', 'OPTIONS', and 'ACTIONS'. The main area displays a form titled 'Form:New Patient Information' with a purple banner at the top. The form contains the following fields and values:

First Name	Jane
Last Name	Doe
Date of Birth	1975-04-22
Street Address	5555 Apple Street
City	Dublin
State	Oh
Zip	43017
Race	White
Contact Name	John Doe
Phone number	555-555-5555
Relationship to Patient	Husband
Primary Insurance Company Name	AAA Insurance
Policy Number / Member ID	547890-42
Group Number	5555555555
Insured Name	Jane Doe
Insured Date of Birth	skipped
Patient Relationship to Insured	Self
Insurance Company Address	skipped
Phone	skipped

Step 3:

You can then choose one of the following common actions:

- 'Send Item' to the patient's chart in 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