## Creating and Sending Form Packets

Last Modified on 12/11/2024 1:17 pm EST

## Creating a Form Packet

A packet is a group of individual forms you can create to send to your patients to complete. Creating a packet is easy to do and only takes a few steps.

## To start go to **Menu** and select **Forms**.

🕷 Home	🖋 Tools	🕸 Admin
Inbox		Q
Appointment Ca	lendar	Ê
Patient Payment	s	
Video Chat		
Forms		
Broadcast		<b>P</b>
Broadcast Repo	ting	.11
Release of Infor	mation	*
Outbound Faxes	i	læ
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1. On the Forms Management page, select Add New Packet.

updox	e e
Forms	Dashboard Management
Forms Management	Add New Form
Forms Library Send Forms	+ Add New Packet
All Forms Packets	
Test Packet	Getting Started
	Select an existing form or packet on the left to preview it. You can also create a new one.
	+ Add New Form + Add New Packet

2. Next, enter a name in the **Packet Name** field. The name should be a unique name, for example, "New Patient Packet". Optionally, you can add a **packet description.** 

ns			Dashboard Manageme
rms Management			Add New Form
rms Library Send Forms			
C Search by name	New Packet		Cancel Save Packet
All Forms Packets	Packet Name *	Add Forms to Packet	
🖹 Contact Info - Small	Sample Packet	Search for the form or packet you'd like to add by name. You ca	an select as many as you'd like.
Customer Advisory Board Post M	Packet Description Optional description goes	Q int	×
Easy Private	here.	🖹 Health Intake - Medium	+ Add to Packet
Easy Public	32/255	Forms In Packet 0	
N Harabba laskalara - Marabbara			

Search for the forms you would like to add. Click **Add to Packet** to add the form to the packet. Repeat for all of the forms in the packet. You can drag and drop the forms to be in the order you would like.

rms			Dashboard Managem
orms Management			Add New Form
Forms Library Send Forms			
Q Search by name	New Packet		Cancel Save Packe
All Forms Packets	Packet Name *	Add Forms to Packet	
🖹 Contact Info - Small	Sample Packet	Search for the form or packet you'd like to add by name. You can select as man	ıy as you'd like.
Customer Advisory Board Post M	Packet Description Optional description goes	Q Cd	>
E Easy Private	here.	🖹 Contact Info - Small	⊘ Added
E Easy Public	32 / 255	DATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	+ Add to Packet
E Health Intake - Medium		Forms In Packet 2	

3. After adding all the forms to the packet, click **Save Packet**.

ms			Dashboard Manageme
orms Management			Add New Form
orms Library Send Forms			
Q Search by name	New Packet		Cancel Save Packet
All Forms Packets	Packet Name *	Add Forms to Packet	
🖹 Contact Info - Small	Sample Packet	Search for the form or packet you'd like to add by name. You can select as many a	is you'd like.
E Customer Advisory Board Post M	Packet Description Optional description goes	Q Search by form or packet name	
E Easy Private	here.	Forms In Packet 3	
E Easy Public	32 / 25	5 II Health Intake - Medium	Ţ
E Health Intake - Medium		:: Contact Info - Small	
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4. You can always add or remove the forms in a packet by selecting **Edit Packet**.

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Forms		Dashboard Management
Forms Management		Add New Form -
Forms Library Send Forms		
Q Search by name	Sample Packet	Edit Packet
All Forms Packets	Packet Description	
C Sample Packet	Forms In This Packet 3 Health Intake - Medium	
	Contact Info - Small	
	PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	

5. Under the ellipsis menu (...) next to the Send Packet button there are other packet actions.

• You can copy a link to the packet. You can use this link in reminders, SMS, Secure Text, or Broadcast messages. You can also paste the link on your website.

When a packet is completed through the link, it will be delivered to your Inbox, but it is not trackable in the Forms Dashboard.

- **Duplicate Packet** creates a copy of the packet.
- Clicking **Delete Packet** will delete the packet from your packet list.

Note: Deleting the packet, will not delete the forms in the packet.

ns			Da	ashboard Managem
rms Managem	ent			Add New Form
orms Library Send For	ms			
् Search by name		Sample Packet	🖉 Edit Packet	⊳ Send Packet …
All Forms Sample Packet Test Packet	Packets	Packet Description         Optional packet description goes here.         Forms In This Packet         Health Intake - Medium         Contact Info - Small         PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT		<ul> <li>Copy Packet Link</li> <li>Duplicate Packet</li> <li>Delete Packet</li> </ul>

After you have created the packet, you can send it to patients to complete.

Select the packet from the menu on the left. Next, enter the patient or patients you would like to send the forms to. Click **Send** to get the forms to your patients to complete before their appointment.

ms		Dashboard Manager
rms Management		Add New Form
orms Library Send Forms		
Search by name	Send Forms	Cancel Ser
All Forms Packets	Patient Search	
🗀 Sample Packet	Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.	
	Q. Search by name, email or cell phone	
	Form Recipients 2	
	Joe Sample Enail:sample@enail.com	Ū
	Test Patient Test: (410) 555-5555	Ũ
	Forms Being Sent 3	
	Health Intake - Medium Source: Sample Packet	1
	Contact Info - Small     Source: Sample Packet	
	DATIENT/HEALTH CARE DROVIDER F-MAIL/TEXTING CONSENT	

After sending the packet, you can view the completion progress of the forms on the Dashboard.

The information on the dashboard includes the following:

- Patient or Contact name (chosen at time of send)
- The form name
- The status of the forms
  - Sent = the forms have been sent to the recipient
  - In Progress = only used for packets or multiple forms to show patient progress once at least one form has been completed
  - Completed = all the forms are complete and submitted back to the Inbox
- If your appointments are synced with Updox, you will see when the recipient's next appointment is
- You can also send a reminder to the patient to complete their assigned forms. The reminder is sent by the same method (text or email) that was used when originally sending the assignment. Once the forms are completed, the **Send Reminder** button will no longer appear.

Note: Forms assignments will automatically drop off the dashboard after 30 days.

updox					٩
Forms				Da	ashboard Management
Dashboard					▷ Send Forms
Patient	Status			Appointment	
Search by First or Last Name	✓ Select an op	tion	*	All	~
Patient Name	Form Name	Status	Next Appointment	Action	
✓ Test Patient Email: sample@email.com	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	⊳ Sent	<b>10/02/2024</b> 2:00 p.m.	Send Reminder	
✓ □ Joe Sample Text: (410) 555-5555	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	⊳ Sent	<b>10/02/2024</b> 1:00 p.m.	Send Reminder	

You can view the status of the individual forms in the packet by clicking the (v) to view the status of all forms sent.

Forms				Dashboard Management
^   🗆	Joe Sample Email: patient@email.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	In Progress: 1 of         10/02/2024           3         1:00 p.m.	Send Reminder
		Health Intake - Medium	⊘ Completed	
		Contact Info - Small	▷ Sent	
		PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	⊳ Sent	

If the recipient needs a reminder to complete the forms before their appointment, click **Send Reminder** to send them an additional message to finish their forms. You will see a **Success** message to know your reminder was sent. You will also see that you when sent the reminder to the patient.

Patient	Status		Appointment
Search by First or Last Name	Select an option	•	All
Patient Name Form Name		Status Next Appointr	nent
Test Patient         Form Group 3           Email: sample@email.com         Send Date: 10/01/2024 at 1:16 p.	n.	▷ Sent         10/02/20           2:00 p.m.         2	Send Reminder
Patient	Status		Appointment
Search by First or Last Name	Select an option	~	All
Patient Name Form Name	Status	Next Appointment	Action
V Test Patient Form Group 3 Email: sample@email.com Send Date: 10/01/2024	≥ Sent	<b>10/02/2024</b> 2:00 p.m.	⊘ Success
Patient	Status		Appointment
Search by First or Last Name	Select an option	Ŧ	All
Patient Name Form Name	Status	Next Appointment	Action
V C Test Patient Form Group 3 Email: sample@email.com Send Date: 10/01/2024	≥ Sent	<b>10/02/2024</b> 2:00 p.m.	Reminder Sent: 10/01/2024 at 2:03 p.m. Send Again?

Once the forms are submitted, the status shows **Complete**. The forms will be delivered to your Inbox.

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Forms				Dashboard	d Management
Dashboard					▷ Send Forms
Patient Search by First or Last Name	Status     Select an option		Appoint	tment	•
Patient Name	Form Name	Status	Next Appointment	Action	
Test Patient     Email: sample@email.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	▷ Sent	<b>10/02/2024</b> 2:00 p.m.	Send Reminder	
Joe Sample     Email: patient@email.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	⊘ Completed	<b>10/02/2024</b> 1:00 p.m.		
	Health Intake - Medium	⊘ Completed			
	Contact Info - Small	⊘ Completed			
	PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	⊘ Completed			