Creating and Sending Form Packets
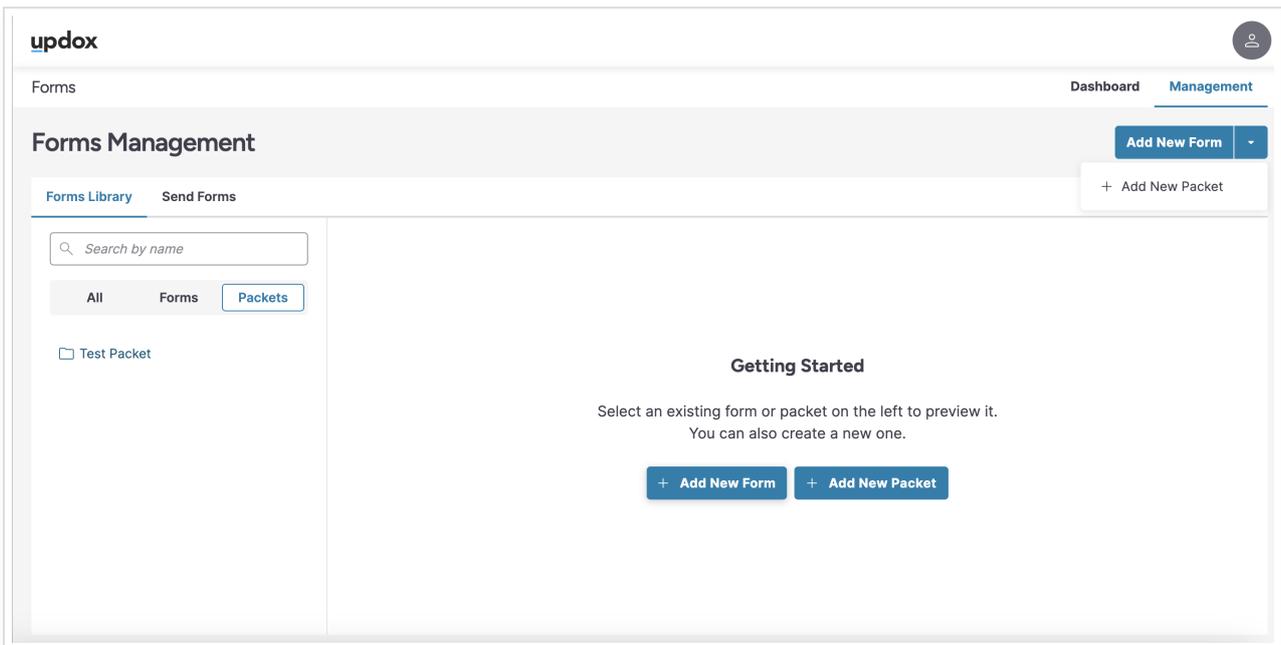
Creating a Form Packet

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.
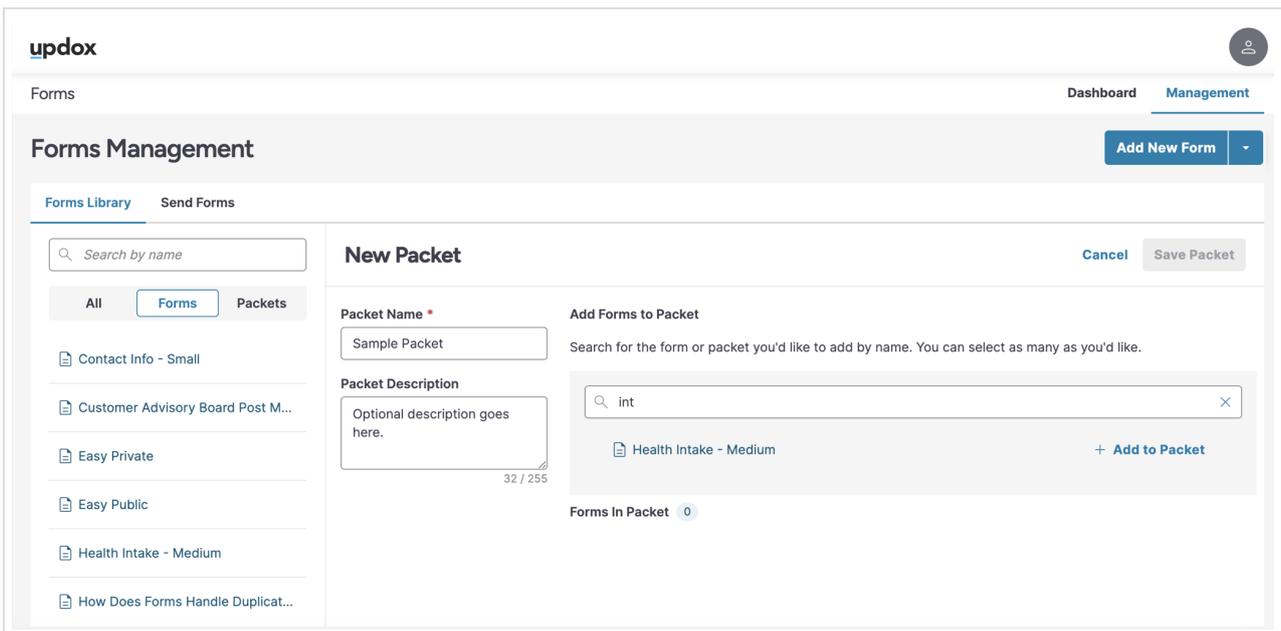
To start go to **Menu** and select **Forms**.
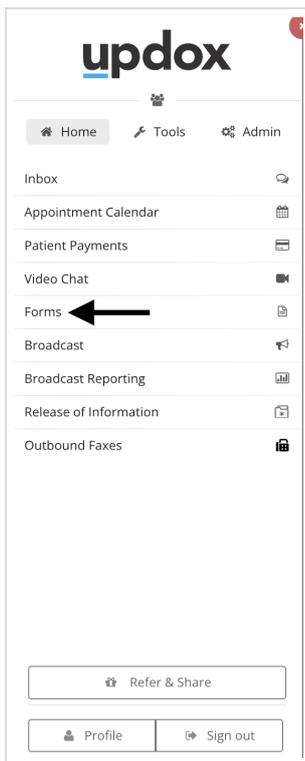
1. On the Forms Management page, select **Add New Packet.**

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.**

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.

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

4. You can always add or remove the forms in a packet by selecting **Edit Packet**.
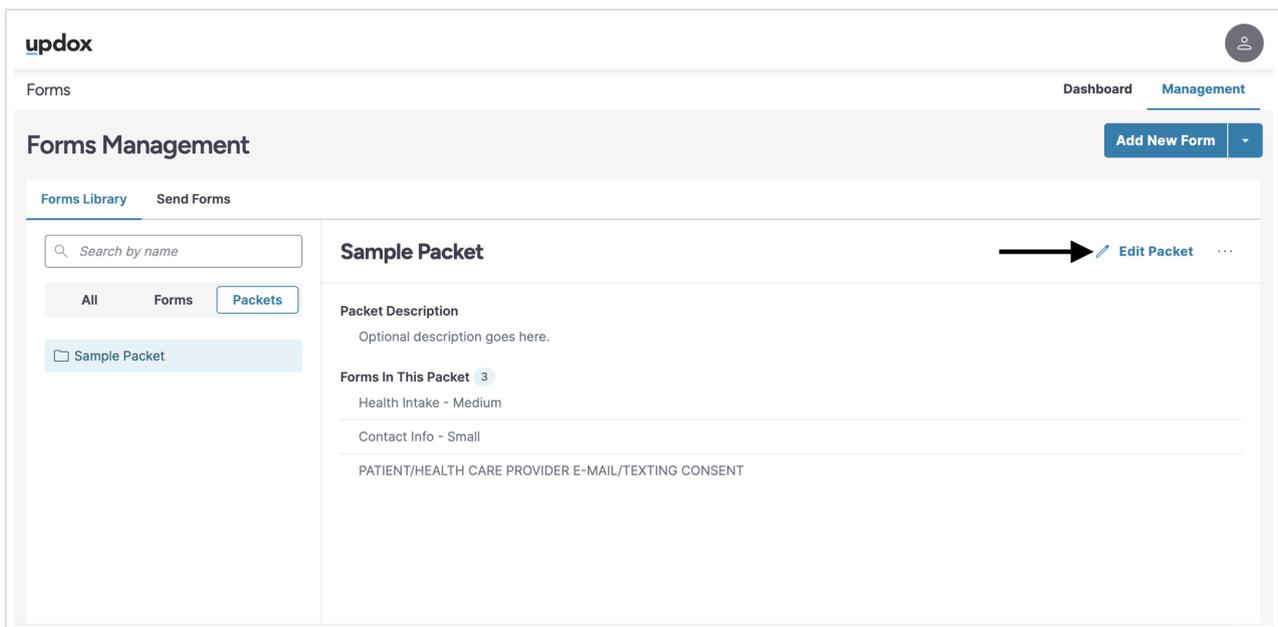
5. Under the ellipsis menu (...) next to the Send Packet button there are other packet actions.

- 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.
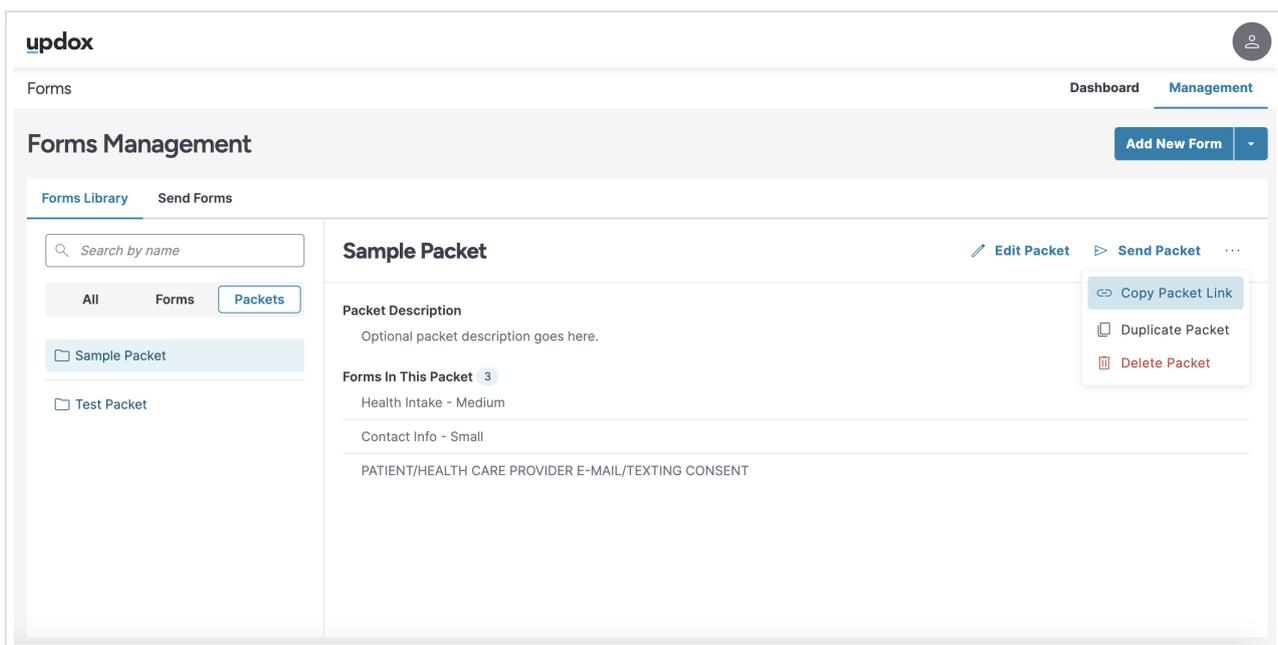
Sending a Packet

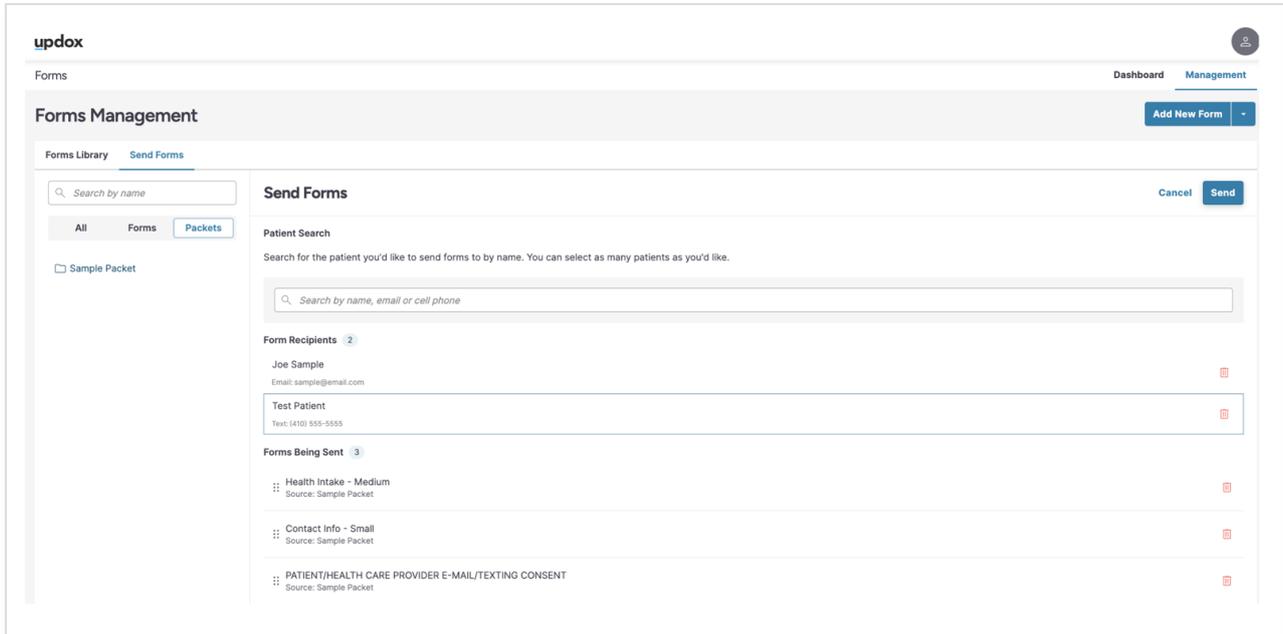After you have created the packet, you can send it to patients to complete.

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.


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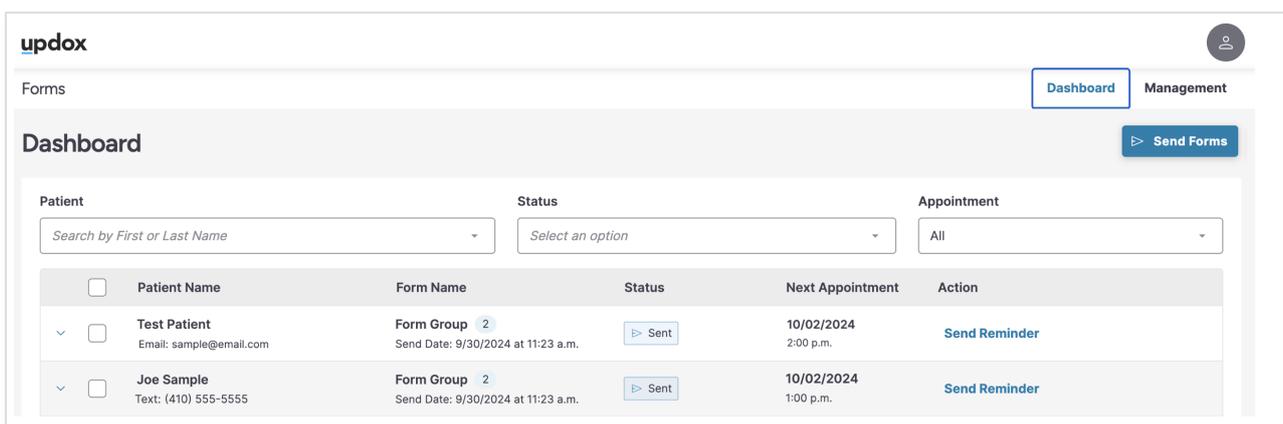
You can view the status of the individual forms in the packet by clicking the (v) to view the status of all forms sent.

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.

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

Dashboard

▷ Send Forms

Patient	Status	Appointment
Search by First or Last Name ▾	Select an option ▾	All ▾

		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	**10/02/2024** 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	**10/02/2024** 1:00 p.m.	
			Health Intake - Medium	⊘ Completed		
			Contact Info - Small	⊘ Completed		
			PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	⊘ Completed		