Sending Forms in the Forms Dashboard

Last Modified on 12/11/2024 1:15 pm EST

Through the Forms Dashboard, you can send forms directly to patients. You can also track their progress on forms and send a reminder to complete their forms before their appointment.

To get to the dashboard go to **Menu** and select **Forms**.

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Inbox	Q
Appointment Calendar	<u></u>
Patient Payments	
Video Chat	
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Release of Information	*
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Sending Forms

1. To begin, select a form to send.



2. After selecting a form, it will appear in the **Send Forms** screen.

ns		Dashboard Manageme
rms Management		Add New Form
rms Library Send Forms		
् Search by name	Send Forms	Cancel Send
All Forms Packets	Patient Search	
🖹 Contact Info - Small	Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.	
Customer Advisory Board Post M	Q Search by name, email or cell phone	
E Easy Private	Form Recipients 0	
Easy Public	You must select a patient in order to send a form. Forms Being Sent 1	

3. You can add more forms by selecting them on the left.

ms		Dashboard Manageme
orms Management		Add New Form
orms Library Send Forms		
Q Search by name	Send Forms	Cancel Send
All Forms Packets	Patient Search	
Easy Public	Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.	
🖹 Health Intake - Medium	Q Search by name, email or cell phone	
How Does Forms Handle Duplicat	Form Recipients 0	
Dew Form	You must select a patient in order to send a form.	
PATIENT/HEALTH CARE PROVIDE	Forms Being Sent 2	in the second
	:: neath intake - Medium	

4. Next, search for the patient or patients you would like to send the forms to.

ms		Dashboard Managemen
orms Management		Add New Form
orms Library Send Forms		
Q Search by name	Send Forms	Cancel Send
All Forms Packets	Patient Search Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.	
Easy Public		×)
Easy Public Health Intake - Medium	C Sample	×
Easy Public Health Intake - Medium How Does Forms Handle Duplicat	C Sample Doe Fo DOB: 01/01/1970 (54 years old) Chart Number: sample123	×
 Easy Public Health Intake - Medium How Does Forms Handle Duplicat New Form 	Q Sample Doe DOB: 01/01/1970 (54 years old) Chart Number: sample123 Fo Joe Sample	×
 Easy Public Health Intake - Medium How Does Forms Handle Duplicat New Form PATIENT/HEALTH CARE PROVIDE 	Q Sample Doe Do: 01/01/1970 (54 years old) Chart Number: sample123 Fo Joe Sample Sample Brendan DOB: 01/01/1979 (45 years old)	X

After selecting the patient, choose the method, email or text, to send them the forms. Repeat the process for other to add more recipients.

ms		Dashboard Ma	nageme
orms Management		Add New F	orm
orms Library Send Forms			
Q Search by name	Send Forms	Cancel	Send
All Forms Packets	Patient Search Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.		
E Health Intake - Medium	Sample		×
 Health Intake - Medium How Does Forms Handle Duplicat 	Sample How would you like to send forms? Fo Email: sample@email.com		×
Health Intake - Medium How Does Forms Handle Duplicat New Form	Sample How would you like to send forms? Fo Email: sample@email.com Text: (410) 555-5555		×
Health Intake - Medium How Does Forms Handle Duplicat New Form PATIENT/HEALTH CARE PROVIDE	Sample How would you like to send forms? Fo Email: sample@email.com Fo Text: (410) 555-5555 :: Health Intake - Medium		×)

5. Once you have added all forms and patients, click **Send** to deliver them to each patient.

ms		Dashboard Managem
orms Management		Add New Form
orms Library Send Forms		
Q Search by name	Send Forms	Cancel Send
All Forms Packets	Patient Search	
Easy Public	Search for the patient you'd like to send forms to by name. You can select as many patients as you'd like.	
Health Intake - Medium	Search by name, email or cell phone	
How Does Forms Handle Duplicat	Form Recipients 2	
New Form	Joe Sample	
	email: sample@email.com	
PATIENT/HEALTH CARE PROVIDE	Test Patient	

6. You will see a message that your forms have been sent.

odox	
rms	Dashboard Manageme
orms Management	Add New Form
Forms Library Send Forms	
Q Search by name	
All Forms Packets	
E How Does Forms Handle Duplicat	
E New Form	Your Forms Have Been Sent
PATIENT/HEALTH CARE PROVIDE	others.
E Private - Favorite Animal Form	
E Public - Favorite Animal Form	

7. Select the **Dashboard** tab to view the status of the forms as your patients complete them.

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 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.

ipdox					e
forms				Dash	board Management
Dashboard					▷ Send Forms
Patient Search by First or Last Name	Select an o	ption	•	Appointment All	-
Patient Name	Form Name	Status	Next Appointment	Action	
V Test Patient Email: sample@email.com	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	▷ Sent	10/02/2024 2:00 p.m.	Send Reminder	
Joe Sample	Form Group 2	⊳ Sent	10/02/2024	Send Reminder	

8. To see the status of individual forms within a group, click the (v) on the left to expand to the detailed view.

ipdox				
forms				Dashboard Managemen
Dashboard				▷ Send Forms
Patient	Status		Appoint	nent
Search by First or Last Name	Select an option		- All	*
Patient Name	Form Name	Status	Next Appointment	Action
Test Patient Text: (410) 555-5555	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	C In Progress: 1 of		Send Reminder
	Health Intake - Medium	⊘ Completed		
	PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	▷ Sent		

9. 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. 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. You will see a **Success** message letting you know the reminder was sent. You will also see when you sent the reminder to the patient.

The reminder message will be delivered with the same delivery method (email or text message) as the initial sending.

Patient Search by First or Last Name	Select an option	,	Appointment
Patient Name Form Name		Status Nex App	t Action pointment
Test Patient Form Group Email: sample@email.com Send Date: 10	3 /01/2024 at 1:16 p.m.	▷ Sent 10/0 2:00	D2/2024 Send Reminder
Patient	Status		Appointment
Search by First or Last Name	← Select an option		× All ×
Patient Name For	m Name Statu	s Next Appointmen	t Action
V C Test Patient Form Email: sample@email.com Send	m Group 3 d Date: 10/01/2024 at 1:16 p.m.	ent 10/02/2024 2:00 p.m.	⊘ Success
Patient Search by First or Last Name	Status Select an option		Appointment
Patient Name For	n Name Statu	s Next Appointmen	t Action
✓	n Group 3 I Date: 10/01/2024 at 1:16 p.m.	nt 10/02/2024 2:00 p.m.	Reminder Sent: 10/01/2024 at 2:03 p.m. <u>Send Again?</u>

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

∧	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	© Completed	10/02/2024 2:00 p.m.
	Health Intake - Medium	⊘ Completed	
	PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT	⊘ Completed	