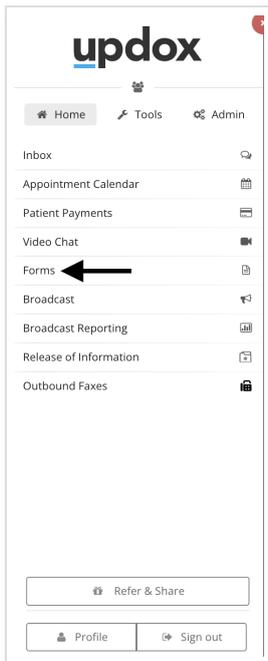


Sending Forms in the Forms Dashboard

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

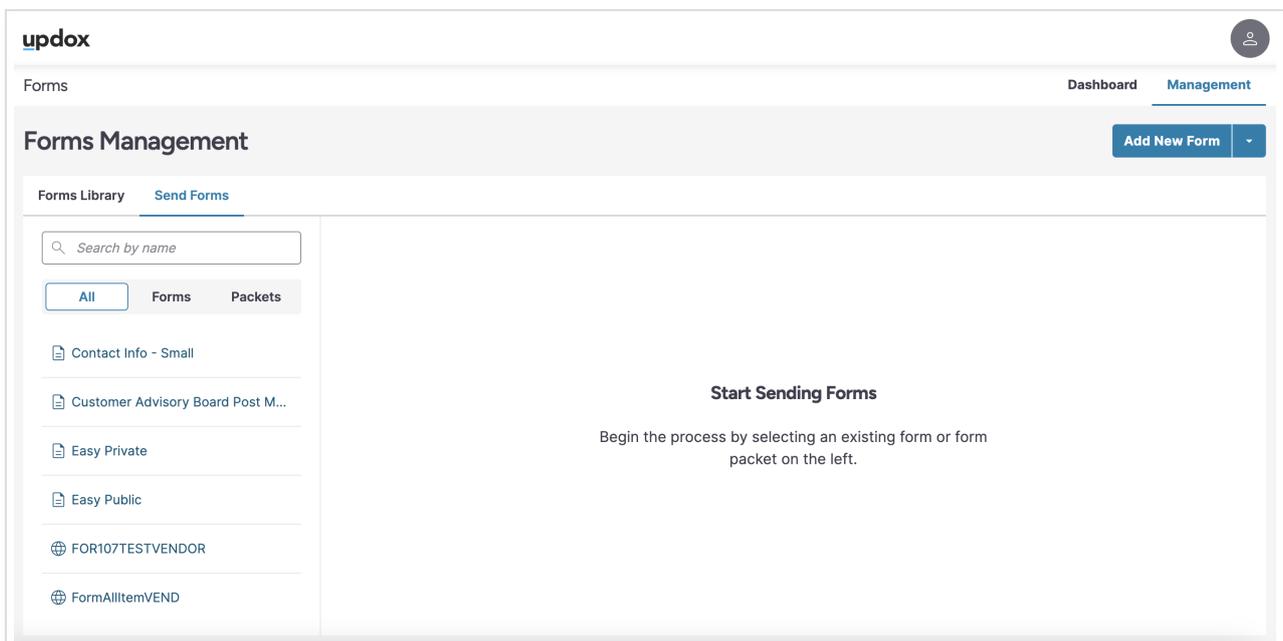
Through the Forms Dashboard, you can send forms directly to patients. You can also track their progress on forms and send a reminder to complete their forms before their appointment.

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

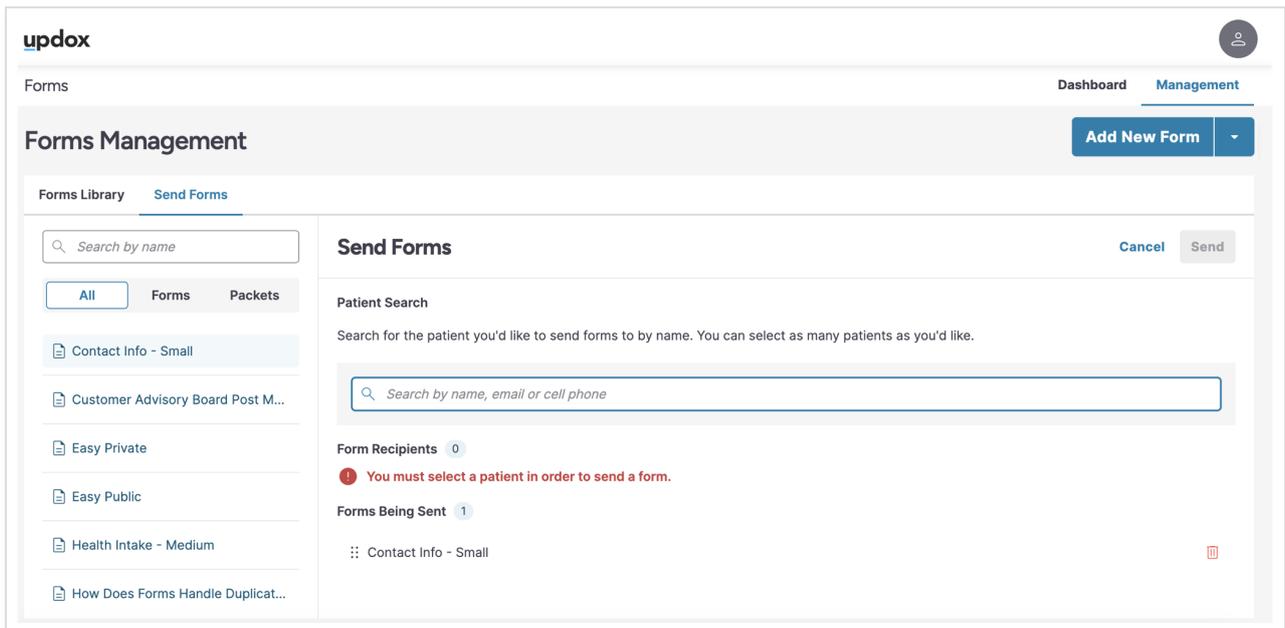


Sending Forms

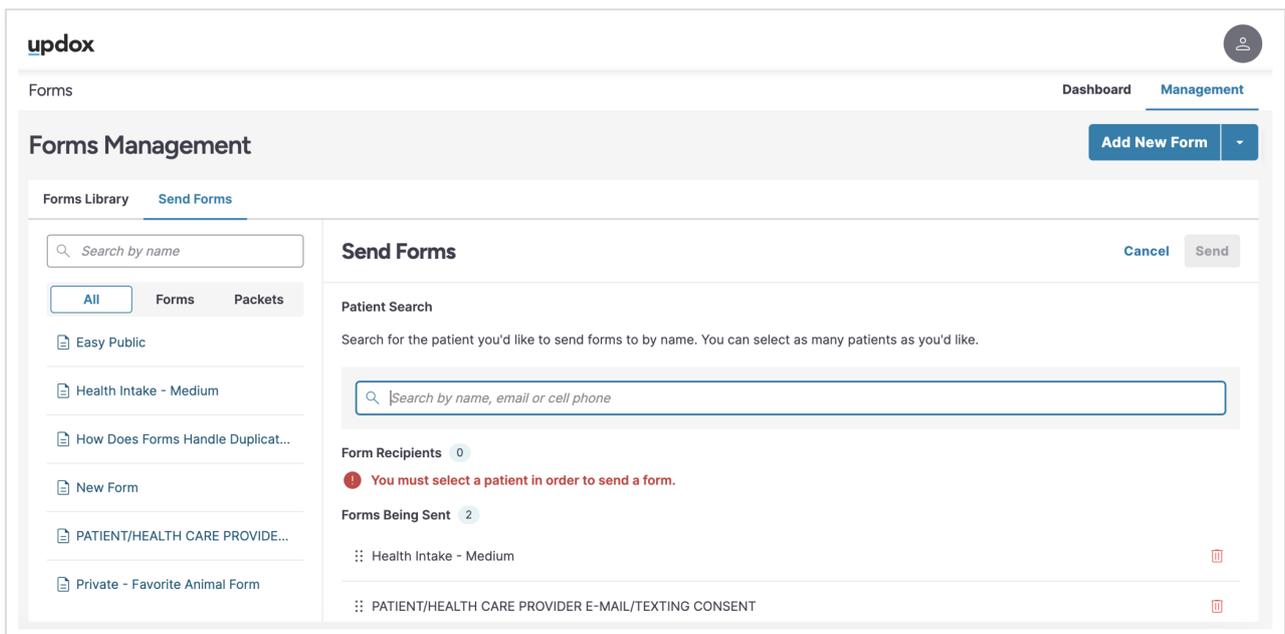
1. To begin, select a form to send.



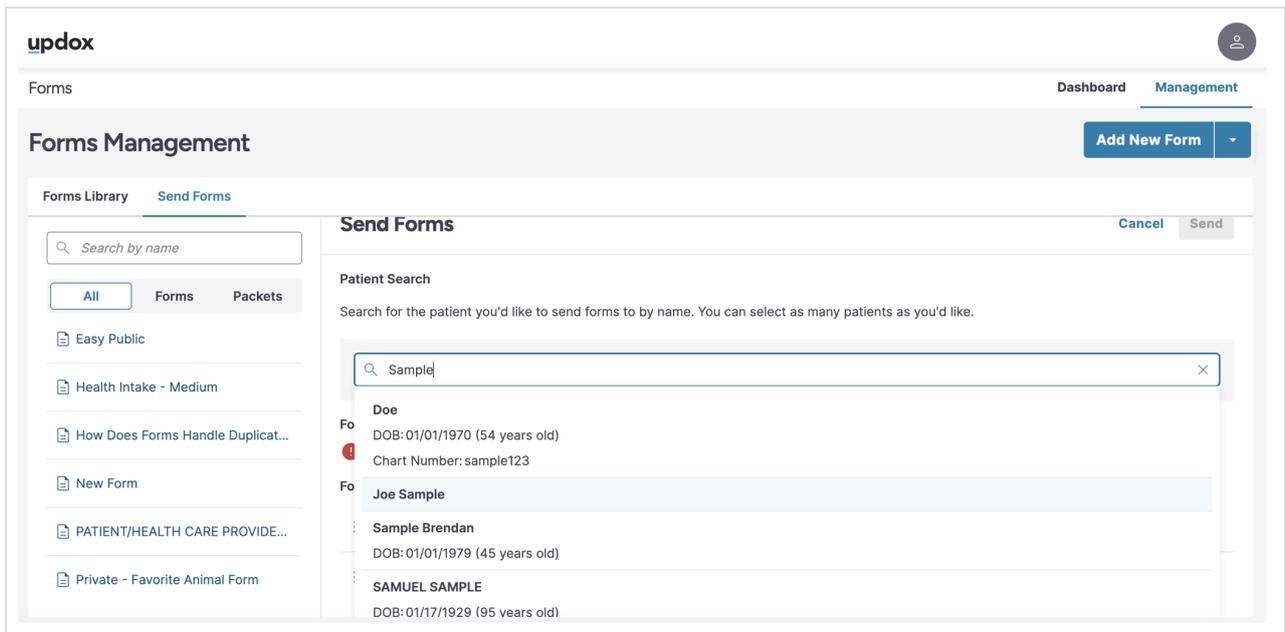
2. After selecting a form, it will appear in the **Send Forms** screen.



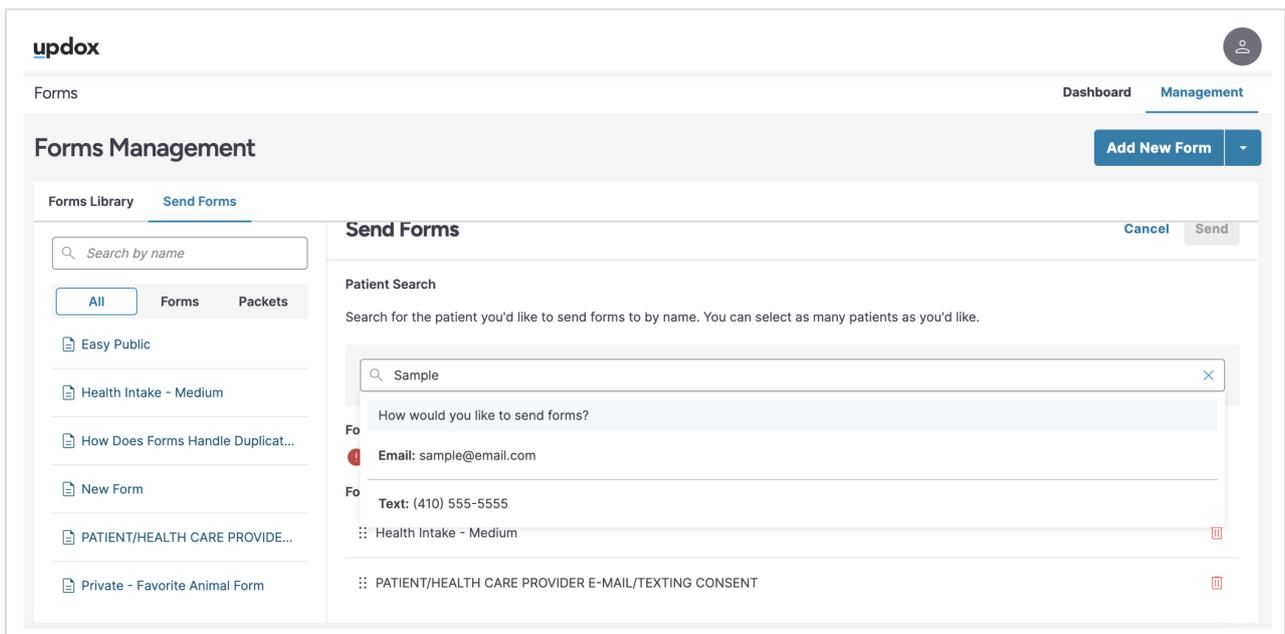
3. You can add more forms by selecting them on the left.



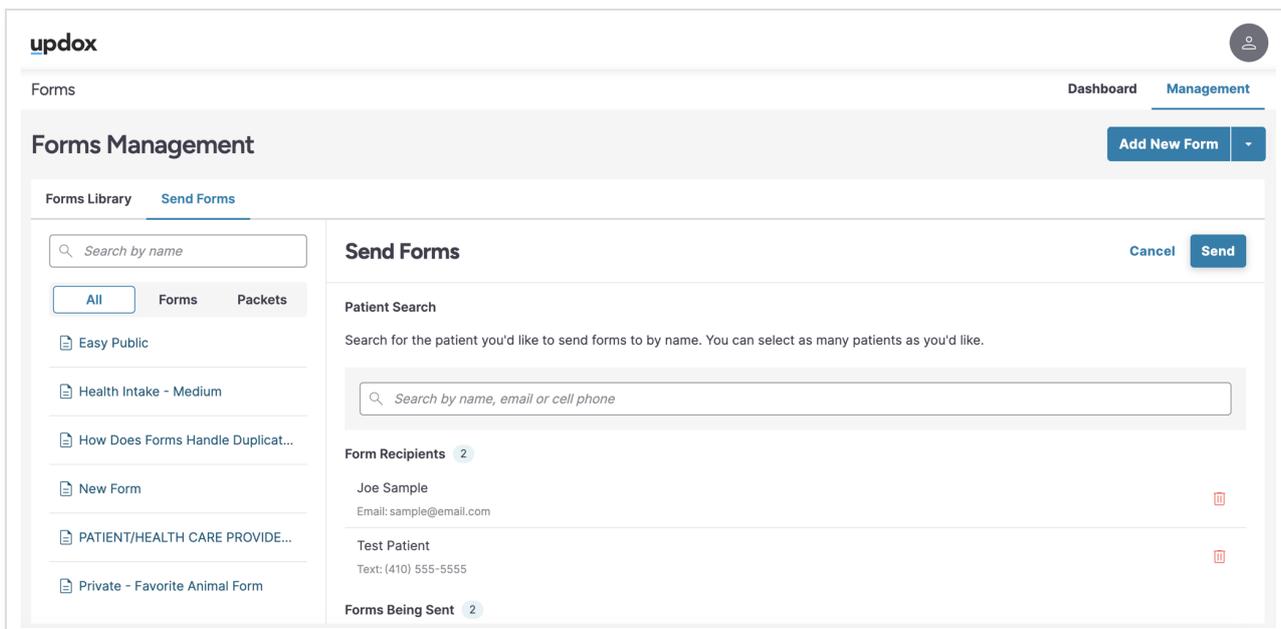
4. Next, search for the patient or patients you would like to send the forms to.



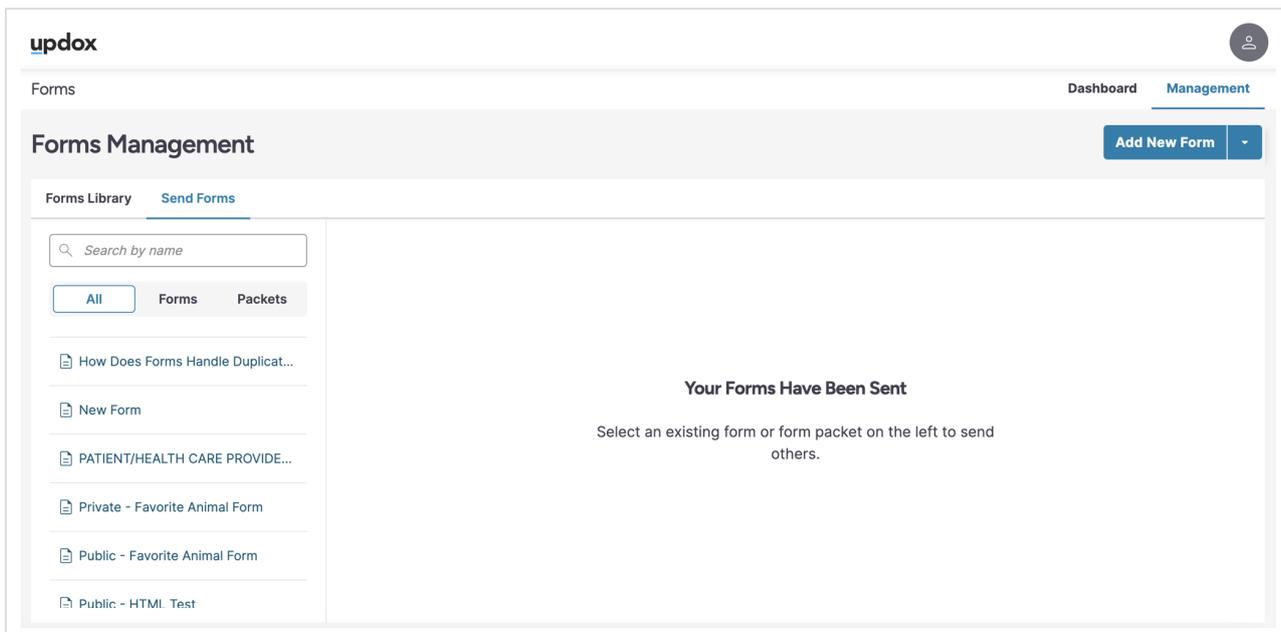
After selecting the patient, choose the method, email or text, to send them the forms. Repeat the process for other to add more recipients.



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



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



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.

The screenshot shows the updox Forms Dashboard. At the top, there are tabs for "Forms", "Dashboard", and "Management". Below the "Forms" tab, there is a "Dashboard" section with a "Send Forms" button. The dashboard features three filters: "Patient" (with a search box "Search by First or Last Name"), "Status" (with a dropdown "Select an option"), and "Appointment" (with a dropdown "All"). Below the filters is a table with the following columns: Patient Name, Form Name, Status, Next Appointment, and Action.

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input checked="" type="checkbox"/>	Test Patient Email: sample@email.com	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	<input type="button" value="Sent"/>	10/02/2024 2:00 p.m.	Send Reminder
<input checked="" type="checkbox"/>	Joe Sample Text: (410) 555-5555	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	<input type="button" value="Sent"/>	10/02/2024 1:00 p.m.	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.

The screenshot shows the updox Forms Dashboard with the "Test Patient" row expanded. The "Status" column now shows a detailed view with a progress indicator: "In Progress: 1 of 2". Below this, there are two rows of form details. The first row is "Health Intake - Medium" with a "Completed" status. The second row is "PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT" with a "Sent" button.

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input checked="" type="checkbox"/>	Test Patient Text: (410) 555-5555	Form Group 2 Send Date: 9/30/2024 at 11:23 a.m.	In Progress: 1 of 2		Send Reminder
		Health Intake - Medium	Completed		
		PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT			<input type="button" value="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 **Status** **Appointment**

Search by First or Last Name Select an option All

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input type="checkbox"/>	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

Patient **Status** **Appointment**

Search by First or Last Name Select an option All

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input type="checkbox"/>	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.	✔ Success

Patient **Status** **Appointment**

Search by First or Last Name Select an option All

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input type="checkbox"/>	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.	Reminder Sent: 10/01/2024 at 2:03 p.m. Send Again?

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

<input type="checkbox"/>	Test Patient Text: (410) 555-5555	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	