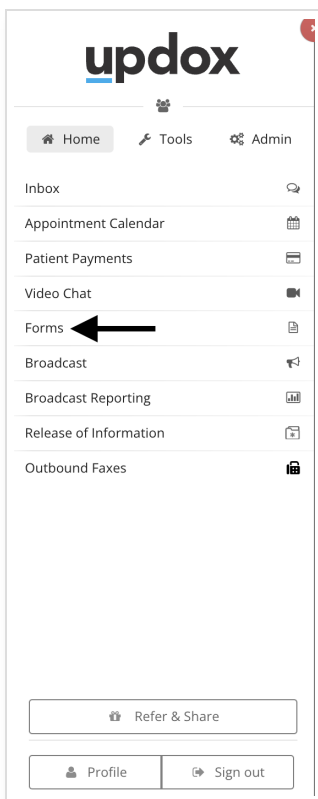


# Form Dashboard Overview

Last Modified on 05/20/2025 3:27 pm EDT

With Updox's Forms Dashboard, you can now connect forms to a specific patient at the time of send. You can also make packets (a grouping of forms) to send to your patients. After forms have been sent, the Forms Dashboard allows you to view the progress of the assignments as patients work through completing the form or packet. You can even send them a reminder to complete their forms if it is getting close to their appointment and they haven't finished them yet.

To get to the Forms Dashboard go to **Home** and select **Forms**.



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.

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FormsDashboardManagement

Dashboard

Send Forms

Patient

Status

Appointment

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input checked="" type="checkbox"/>	Joe Sample Email: sample@email.com	Form Group 2 Send Date: 10/02/2024 at 1:11 p.m.	In Progress: 1 of 2	10/02/2024 1:00 p.m.	Send Reminder
<input checked="" 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?
<input checked="" type="checkbox"/>	John Sample Email: patient@sample.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	Completed	10/02/2024 1:00 p.m.	Send Reminder
<input checked="" type="checkbox"/>	Laurie Sample Email: sample@fake.com	Form Group 3 Send Date: 9/30/2024 at 1:31 p.m.	Completed	10/02/2024 1:00 p.m.	
<input checked="" type="checkbox"/>	Test Sample 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.	

The Forms Dashboard also has the following filter options:

- Patient Name
- Status
- Appointment

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FormsDashboardManagement

Dashboard

Send Forms

Patient

Status

Appointment

sample

Doe  
DOB: 01/01/1970 (54 years old)  
Chart Number: sample123

Joe Sample

Sample Brendan  
DOB: 01/01/1979 (45 years old)

SAMUEL SAMPLE  
DOB: 01/17/1929 (95 years old)  
Chart Number: 8888

Status	Next Appointment	Action
In Progress: 1 of 2	10/02/2024 1:00 p.m.	Send Reminder
Sent	10/02/2024 2:00 p.m.	Reminder Sent: 10/01/2024 at 2:03 p.m. Send Again?
Completed	10/02/2024 1:00 p.m.	
Completed	10/02/2024 1:00 p.m.	

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Forms

DashboardManagement

Dashboard

Send Forms

Patient

Status

Appointment

Search by First or Last Name

Select an option

All

☐

Patient Name

Form Name

Status

Action

☐

Joe Sample  
Email: sample@updox.com

Form Group 2  
Send Date: 10/02/2024

☐ Select All

Send Reminder

☐

Test Patient  
Email: sample@updox.com

Form Group 3  
Send Date: 10/01/2024

☐ Sent

Reminder Sent: 10/01/2024 at 2:03 p.m.  
[Send Again?](#)

☐

Joe Sample  
Email: sample@updox.com

Form Group 3  
Send Date: 10/01/2024

☐ Completed

☐

Joe Sample  
Email: sample@updox.com

Form Group 3  
Send Date: 9/30/2024 at 1:31 p.m.

☐ In Progress

☐

Joe Sample  
Email: sample@updox.com

Form Group 3  
Send Date: 10/02/2024 at 1:00 p.m.

☐ Message Failed

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Forms

DashboardManagement

Dashboard

Send Forms

Patient

Status

Appointment

Search by First or Last Name

Select an option

All

☐

Patient Name

Form Name

Status

Next Appointment

All

☐

Joe Sample  
Email: sample@updox.com

Form Group 2  
Send Date: 10/02/2024 at 1:11 p.m.

In Progress: 1 of 2

10/02/2024  
1:00 p.m.

Today (10/02/2024)

☐

Test Patient  
Email: sample@updox.com

Form Group 3  
Send Date: 10/01/2024 at 1:16 p.m.

☐ Sent

10/02/2024  
2:00 p.m.

Tomorrow (10/03/2024)

☐

Joe Sample  
Email: sample@updox.com

Form Group 3  
Send Date: 10/01/2024 at 1:16 p.m.

☐ Completed

10/02/2024  
1:00 p.m.

Within Three Days (10/05/2024)

☐

Within Five Days (10/07/2024)

☐

Within One Week (10/09/2024)

At the bottom of the page, you'll find buttons to navigate to more assignment pages in the dashboard. The list is ordered with the most recently sent assignment first.

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Forms

DashboardManagement

☐

John Sample  
Email: patient@sample.com

Form Group 3  
Send Date: 10/01/2024 at 1:16 p.m.

☐ Completed

10/02/2024  
1:00 p.m.

☐

Laurie Sample  
Email: sample@fake.com

Form Group 3  
Send Date: 9/30/2024 at 1:31 p.m.

☐ Completed

10/02/2024  
1:00 p.m.

☐

Test Sample  
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.

☐

Jane Sample  
Email: sample@updox.com

Form Group 2  
Send Date: 9/30/2024 at 11:23 a.m.

☐ Sent

10/02/2024  
1:00 p.m.

Send Reminder

☐

Brian Test  
Email: sample@sample.com

Test Form Delete  
Send Date: 9/19/2024 at 2:38 p.m.

☐ Completed

☐

Jane Test  
Email: sample@updox.com

Form Group 2  
Send Date: 9/19/2024 at 2:32 p.m.

In Progress: 1 of 2

Reminder Sent: 9/19/2024 at 2:36 p.m.  
[Send Again?](#)

☐

Sarah Test  
Email: email@email.com

Form Group 2  
Send Date: 8/22/2024 at 11:17 a.m.

☐ Completed

☐

Jeff Sample  
Email: sample@email.com

Form Group 2  
Send Date: 8/22/2024 at 11:17 a.m.

☐ Sent

10/02/2024  
1:00 p.m.

Reminder Sent: 8/23/2024 at 4:04 p.m.  
[Send Again?](#)

1 - 10 of 27 items

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

Under the **Management** tab, you can view your existing forms and packets, create new or edit forms and packets, and initiate sending forms and packets.

The screenshot shows the Updox Forms Management dashboard. At the top, there's a header with the Updox logo and a user profile icon. Below the header, there's a navigation bar with 'Forms' and 'Management' tabs. The 'Management' tab is active. On the right side of the navigation bar, there's a button 'Add New Form' and a dropdown arrow. Below the navigation bar, there's a section titled 'Forms Management'. On the left side of this section, there's a sidebar with a search bar 'Search by name' and three tabs: 'All', 'Forms', and 'Packets'. The 'Packets' tab is selected. Below the tabs, there's a checkbox labeled 'Test Packet'. The main area of the dashboard displays a 'Getting Started' message: 'Select an existing form or packet on the left to preview it. You can also create a new one.' At the bottom of this message, there are two buttons: '+ Add New Form' and '+ Add New Packet'.

Under the Forms Library tab, you can view your existing forms and packets. You can view them all together or select the one you would like to view.

The screenshot shows the Updox Forms Management dashboard with a selected form. The header and navigation bar are the same as in the previous screenshot. The 'Forms Management' section is active. On the left sidebar, the 'Forms Library' tab is selected. Below the tabs, there's a list of forms and packets. The first item is 'Check Box Test Form'. The second item is 'COVID-19 Patient Screening Ques...', which is highlighted. Below it are 'KS All Input Fields', 'New Form', 'New Patient Form - Updox Example', and 'New Patient Form - Updox Example'. The main area of the dashboard displays the details of the selected form, 'COVID-19 Patient Screening Questionnaire - Updox Example'. At the top right of this area, there are buttons 'Edit Form' and 'Send Form'. Below the title, there's a paragraph: 'Please fill out this form completely. This information helps us provide you the best medical care and treatment possible. If you have any questions, please contact the office.' Below this, there's a section titled 'COVID-19 Patient Screening Questionnaire'. It starts with a note: 'All questions marked with an asterisk (\*) are required and must be completed before you are able to submit the survey.' The first question is 'Patient Name \*', followed by a text input field. The second question is 'Date of Birth \*', followed by a date input field with a calendar icon. The third question is 'Are you currently experiencing, or have experienced in the past 14 days, any of the following symptoms?'.

You can also search for the form or packet you are looking for.

The screenshot shows the Updox Forms Management interface. On the left, there's a sidebar with a search bar containing 'cov' and tabs for 'All', 'Forms', and 'Packets'. Below the search bar, a list of forms is shown, with 'COVID-19 Patient Screening Ques...' selected. The main area displays a preview of the 'COVID-19 Patient Screening Questionnaire - Updox Example'. The form includes a title, a description, a list of required fields (marked with an asterisk), and a form structure with fields for 'Patient Name' and 'Date of Birth' (with a date picker). The form also includes a question about symptoms.

Under the Forms Library tab, when you select a form, you will see a preview of it in the main window. From here, you can select **Send Form** to [initiate sending](#). If you need to make changes to the form, click **Edit Form**.

This screenshot is similar to the first one, but it shows the full list of forms in the sidebar, including 'Check Box Test Form', 'COVID-19 Patient Screening Ques...', 'KS All Input Fields', 'New Form', 'New Patient Form - Updox Example', and 'New Patient Form - Updox Example'. The main area still shows the preview of the 'COVID-19 Patient Screening Questionnaire - Updox Example'. The form structure is identical to the first screenshot, but the ellipsis menu next to the 'Send Form' button is visible, indicating additional actions available.

Under the ellipsis menu (...) next to the Send Form button there are several actions you can take with the form.

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

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

- You can also print the form if needed.
- **Duplicate Form** makes a copy of the form.
- **Delete Form** permanently removes the form from your account. Deleting the form will also remove it from any packets that feature the form. This action can't be undone.

The screenshot shows the Updox Forms Management interface. On the left is a sidebar with navigation icons. The main header includes the Updox logo, 'Forms', and tabs for 'Dashboard' and 'Management'. Below the header, there's a 'Forms Management' section with a search bar and tabs for 'Forms Library' and 'Send Forms'. A list of forms is shown on the left, with 'Contact Info - Small' selected. The main area displays the form details for 'Contact Info - Small', including a description, a 'Required field' indicator, and form fields for 'First Name', 'Middle Name', and 'Last Name'. A dropdown menu is open next to the 'Send Form' button, showing options: 'Copy Form Link', 'Print Form', 'Duplicate Form', and 'Delete Form'.

When you select a packet, you can see the forms contained in the packet. **Edit Packet** allows you to add or remove forms to the packet. **Send Packet** will [initiate sending](#) the packet.

The screenshot shows the Updox Forms Management interface with the 'Packets' tab selected. The main area displays the details for a 'Sample Packet', including a 'Packet Description' and a list of 'Forms In This Packet' (Health Intake - Medium, Contact Info - Small, and PATIENT/HEALTH CARE PROVIDER E-MAIL/TEXTING CONSENT). The 'Edit Packet' and 'Send Packet' buttons are visible, along with an ellipsis menu (...).

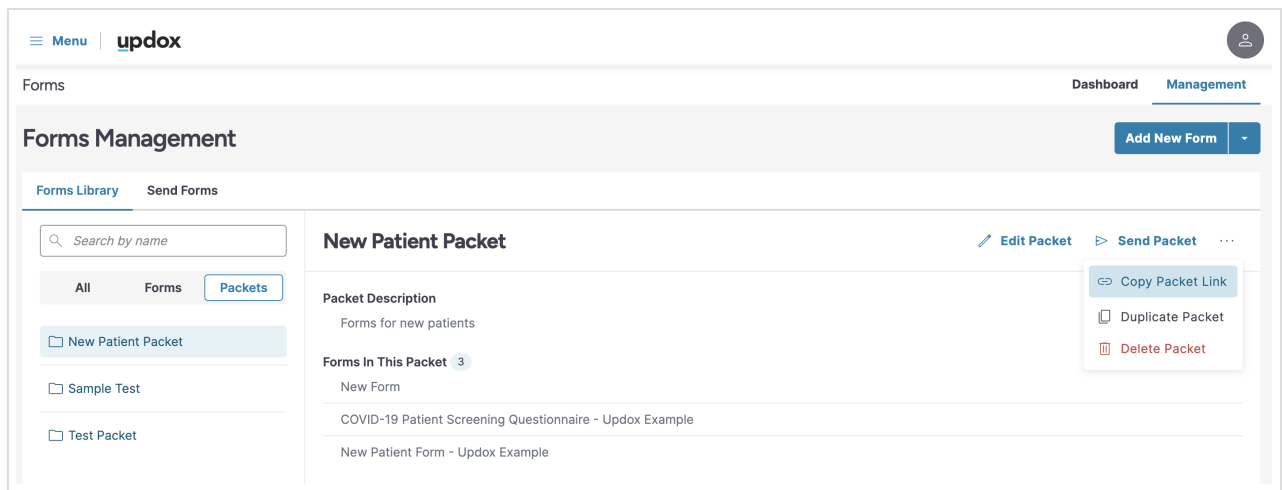
Under the ellipsis menu (...) next to the Send Packet button there are other packet actions.

- 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.



Please see our other articles on the Forms Dashboard for more information.

- [Sending Forms in the Forms Dashboard](#)
- [Creating and Sending Form Packets](#)
- [Forms Dashboard Patient Experience](#)
- [Creating Forms with the Forms Dashboard](#)