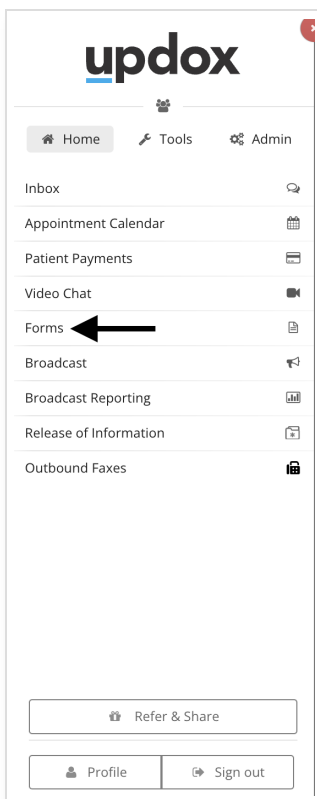


# Form Dashboard Overview

Last Modified on 12/11/2024 1:16 pm EST

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.

updox Dashboard Management

Forms Send Forms

### Dashboard

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

updox Dashboard Management

Forms Send Forms

### Dashboard

Patient: 
 Status: 
 Appointment:

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment	Action
<input checked="" type="checkbox"/>	Doe DOB: 01/01/1970 (54 years old) Chart Number: sample123	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"/>	Joe Sample	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"/>	Sample Brendan DOB: 01/01/1979 (45 years old)	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	Completed	10/02/2024 1:00 p.m.	
<input checked="" type="checkbox"/>	SAMUEL SAMPLE DOB: 01/17/1929 (95 years old) Chart Number: 8888	Form Group 3 Send Date: 10/01/2024 at 1:31 p.m.	Completed	10/02/2024 1:00 p.m.	

Forms Dashboard Management

**Dashboard** ▶ Send Forms

Patient:  Status:  Appointment:

<input type="checkbox"/>	Patient Name	Form Name	Status	Action
<input type="checkbox"/>	Joe Sample Email: bwilberton@updox.com	Form Group 2 Send Date: 10/02/2024	<input type="checkbox"/> Select All	<a href="#">Send Reminder</a>
<input type="checkbox"/>	Test Patient Email: brendan.wilberton@drchrono.com	Form Group 3 Send Date: 10/01/2024	<input type="checkbox"/> Sent <input type="checkbox"/> Completed <input type="checkbox"/> In Progress <input type="checkbox"/> Message Failed	Reminder Sent: 10/01/2024 at 2:03 p.m. <a href="#">Send Again?</a>
<input type="checkbox"/>	Joe Sample Email: bwilberton@updox.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	<input checked="" type="checkbox"/> Completed	
<input type="checkbox"/>	Joe Sample Email: bwilberton@updox.com	Form Group 3 Send Date: 9/30/2024 at 1:31 p.m.	<input checked="" type="checkbox"/> Completed	10/02/2024 1:00 p.m.

Forms Dashboard Management

**Dashboard** ▶ Send Forms

Patient:  Status:  Appointment:

<input type="checkbox"/>	Patient Name	Form Name	Status	Next Appointment
<input type="checkbox"/>	Joe Sample Email: bwilberton@updox.com	Form Group 2 Send Date: 10/02/2024 at 1:11 p.m.	<input type="checkbox"/> In Progress: 1 of 2	10/02/2024 1:00 p.m.
<input type="checkbox"/>	Test Patient Email: brendan.wilberton@drchrono.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	<input type="checkbox"/> Sent	10/02/2024 2:00 p.m.
<input type="checkbox"/>	Joe Sample Email: bwilberton@updox.com	Form Group 3 Send Date: 10/01/2024 at 1:16 p.m.	<input checked="" type="checkbox"/> Completed	10/02/2024 1:00 p.m.

**All**

Today (10/02/2024)

Tomorrow (10/03/2024)

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.

**updox** Dashboard Management

Forms

<input type="checkbox"/>	<b>John Sample</b> Email: patient@sample.com	<b>Form Group 3</b> Send Date: 10/01/2024 at 1:16 p.m.	<span>Completed</span>	<b>10/02/2024</b> 1:00 p.m.	
<input type="checkbox"/>	<b>Laurie Sample</b> Email: sample@fake.com	<b>Form Group 3</b> Send Date: 9/30/2024 at 1:31 p.m.	<span>Completed</span>	<b>10/02/2024</b> 1:00 p.m.	
<input type="checkbox"/>	<b>Test Sample</b> Text: (410) 555-5555	<b>Form Group 2</b> Send Date: 9/30/2024 at 11:23 a.m.	<span>Completed</span>	<b>10/02/2024</b> 2:00 p.m.	
<input type="checkbox"/>	<b>Jane Sample</b> Email: sample@updox.com	<b>Form Group 2</b> Send Date: 9/30/2024 at 11:23 a.m.	<span>Sent</span>	<b>10/02/2024</b> 1:00 p.m.	<a href="#">Send Reminder</a>
<input type="checkbox"/>	<b>Brian Test</b> Email: sample@sample.com	<b>Test Form Delete</b> Send Date: 9/19/2024 at 2:38 p.m.	<span>Completed</span>		
<input type="checkbox"/>	<b>Jane Test</b> Email: sample@updox.com	<b>Form Group 2</b> Send Date: 9/19/2024 at 2:32 p.m.	<span>In Progress: 1 of 2</span>		<b>Reminder Sent:</b> 9/19/2024 at 2:36 p.m. <a href="#">Send Again?</a>
<input type="checkbox"/>	<b>Sarah Test</b> Email: email@email.com	<b>Form Group 2</b> Send Date: 8/22/2024 at 11:17 a.m.	<span>Completed</span>		
<input type="checkbox"/>	<b>Jeff Sample</b> Email: sample@email.com	<b>Form Group 2</b> Send Date: 8/22/2024 at 11:17 a.m.	<span>Sent</span>	<b>10/02/2024</b> 1:00 p.m.	<b>Reminder Sent:</b> 8/23/2024 at 4:04 p.m. <a href="#">Send Again?</a>

1 - 10 of 27 items 1 2 3

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.

**updox** Dashboard Management

Forms

## Forms Management

[Add New Form](#) + [Add New Packet](#)

[Forms Library](#) [Send Forms](#)

[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](#)

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 interface. At the top, there is a navigation bar with a "Menu" icon, the "updox" logo, and a user profile icon. Below the navigation bar, the page is titled "Forms" and "Forms Management". On the right side of the "Forms Management" header, there is a "Dashboard" link and a "Management" link, along with an "Add New Form" button. The main content area is divided into two sections: "Forms Library" and "Send Forms". The "Forms Library" section contains a search bar with the placeholder text "Search by name" and a list of form items: "All", "Forms", and "Packets". Below this list, there are several form items, 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 "Send Forms" section is currently selected, and it displays a preview of the "COVID-19 Patient Screening Questionnaire - Updox Example" form. The form preview includes a title, a description, a list of required fields, and a form with input fields for "Patient Name" and "Date of Birth". The form also includes a question: "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.

This screenshot is identical to the one above, but it shows the search bar in the "Forms Library" section with the text "cov" entered. The search results list is updated to show only the "COVID-19 Patient Screening Ques..." form, which is highlighted in blue. The rest of the interface, including the "Send Forms" section and the form preview, remains the same.

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**.

The screenshot shows the 'Forms Management' page in the Updox system. On the left is a 'Forms Library' sidebar with a search bar and a list of forms 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 displays a form titled 'COVID-19 Patient Screening Questionnaire - Updox Example'. The form includes a header with 'Edit Form' and 'Send Form' buttons, followed by instructions: '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 is a legend for asterisks indicating required fields. The form fields include 'Patient Name \*' and 'Date of Birth \*' (with a date picker). At the bottom, there is a question: 'Are you currently experiencing, or have experienced in the past 14 days, any of the following symptoms?'.

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

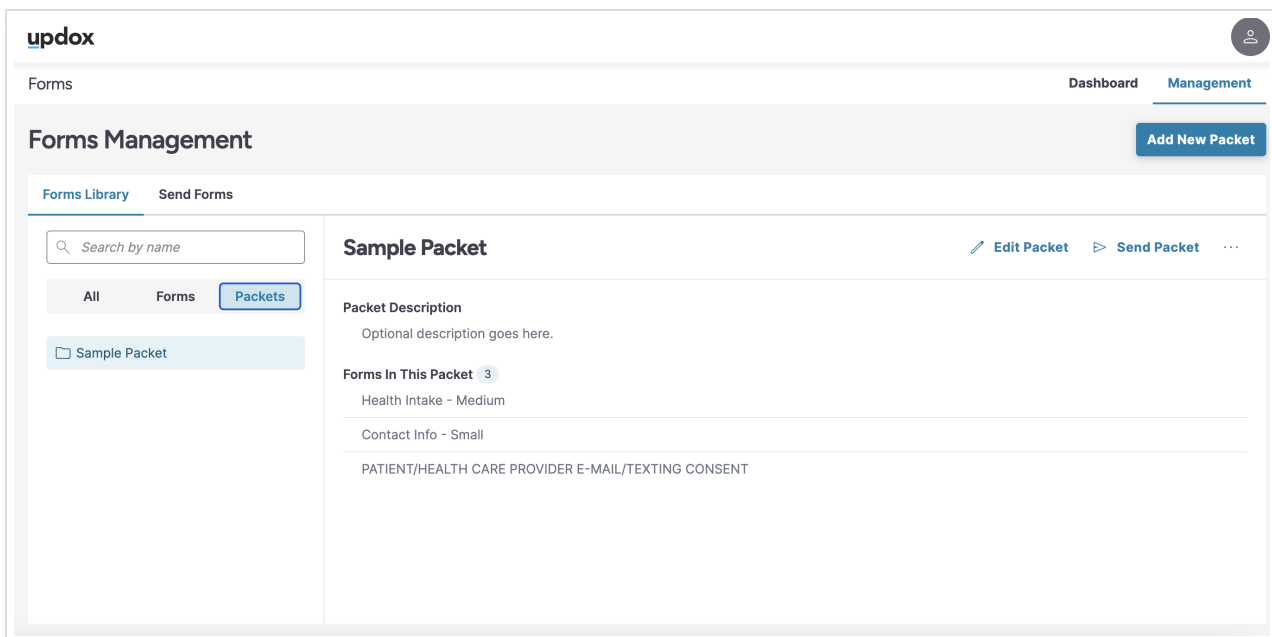
- You can copy a link to the form. You can use this link in reminders, SMS, Secure Text, or Broadcast messages. You can also paste the link on your website.

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.

This screenshot shows the 'Forms Management' page with a different form selected: 'Contact Info - Small'. The sidebar on the left lists various forms and packets, including 'Contact Info - Small', 'Customer Advisory Board Post M...', 'Easy Private', 'Easy Public', 'FOR107TESTVENDOR', and 'FormAllItemVEND'. The main form area shows the 'Contact Info - Small' form with instructions and a legend. A context menu is open over the 'Send Form' button, showing options: 'Copy Form Link', 'Print Form', 'Duplicate Form', and 'Delete Form'. The form fields include 'First Name \*', 'Middle Name', and 'Last Name \*'.

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.



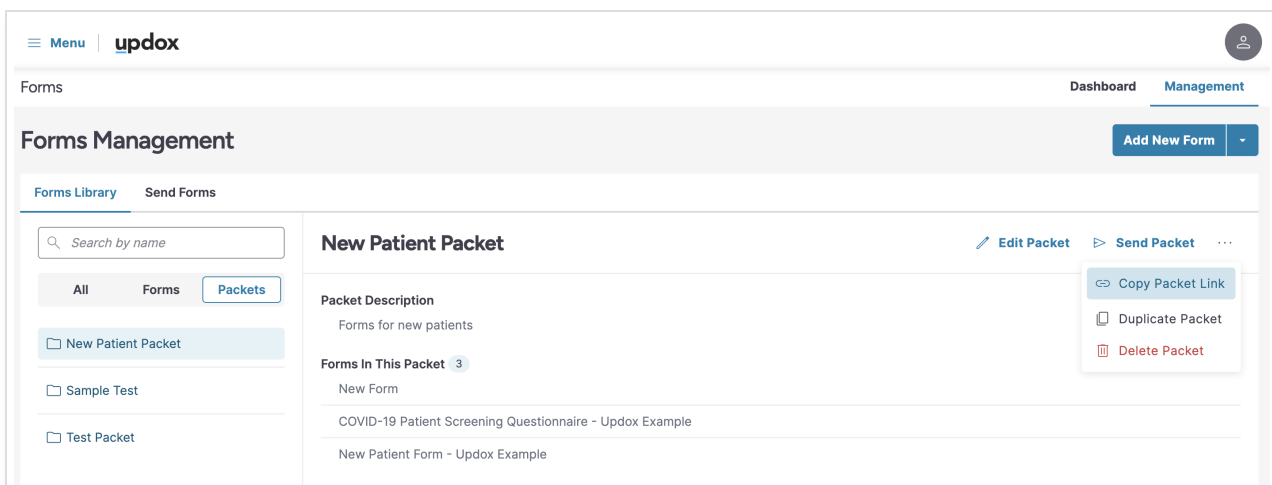
Under the ellipsis menu (...) next to the Send Packet button there are other packet actions.

- 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](#)

