

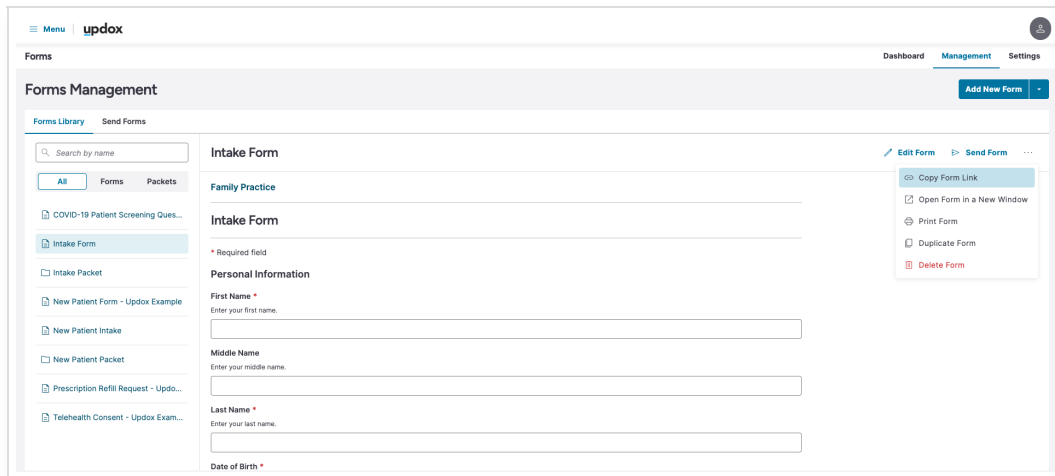
FAQ: Forms

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We often get these questions about forms. We wanted to put together a FAQ guide to help you find answers to your questions easily.

Form Management

- I have 5 forms that I would like to combine into a single form. Is there any way to copy, paste, or merge content from different forms?
 - No. We currently cannot merge or combine forms.
- Help! I'm not able to use certain field types (signature, star rating, link, or image upload) in my form. Why is that?
 - There are two types of forms: portal forms and web forms. Portal forms appear on your patient portal, under the portal tab. Web forms appear in the forms library with a URL. If you check "active/public on portal" when creating a form, certain field types are disabled. Some people decide to leave those boxes unchecked and copy the URL into the "about us" portion of their patient portal.
- Where can I find the form URLs?
 - Go to **Menu > Forms**. Select the form whose URL you would like to copy. Click on the ellipsis menu (...) and click **Copy Form Link**.



The screenshot displays the 'Forms Management' interface in the Updox system. The top navigation bar includes 'Menu', 'updox', and 'Forms'. Below this, there are tabs for 'Forms Library' and 'Send Forms'. A search bar is present, along with filters for 'All', 'Forms', and 'Packets'. The main content area shows a form titled 'Intake Form' with sections for 'Family Practice' and 'Personal Information'. The 'Personal Information' section includes fields for 'First Name', 'Middle Name', 'Last Name', and 'Date of Birth', each with a 'Required field' indicator. A right-hand menu is open, showing options: 'Copy Form Link', 'Open Form in a New Window', 'Print Form', 'Duplicate Form', and 'Delete Form'. The 'Copy Form Link' option is highlighted.

- I'd like to selectively cascade or hide questions based on answers to previous questions in a form. How can I do that?
 - This is not currently possible, but we may create this possibility in the future!