

Sending Intake Form Links

Intake form links can be sent to new patients both automatically and manually.

Automatic

To automatically send an intake form link when a new patient creates an account, go to your [Settings and Templates](#) page. Under Basics, check the Send Intake box. You can also do this from your [Intake Form Settings](#) page. When this box is checked, patients will automatically receive their intake form link:

Sending Intakes to New Patients

☒ Send Intake:

New patients have an intake created and emailed the link.
Only true if [intakes are setup](#)

Save Intake Preference

Manual

You can also manually sent an intake form link from the [Patient Profile](#) page. Just click the Resend button in the Intake section:

Intake

Intake Started Wednesday, September 16 2020
This intake expires Friday, October 16 2020

Go to form

Resend to artdudejoe@icloud.com

Cancel Intake

Log Time	action
2020-09-16 16:53:55	intake Message Delivered
2020-09-16 16:53:55	intake Message Opened

The Intake section on the Patient Profile page also shows a log of when intake form links were delivered and opened.

Click Go to Form to open the intake form directly from the Patient Profile page.

Once a patient has completed their Intake Form, their answers will appear in the Intake section on their Patient Profile page:

Intake

Intake Answers Submitted Wednesday, June 17 2020

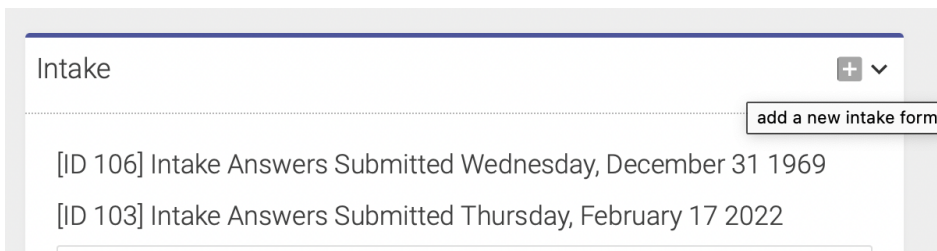
Serious Issues
Acupuncture
Is this your first acupuncture treatment?
No

Serious Issues
Seriously
Do you like chocolate?
Of course

Serious Issues
Mental Health
Does it bother you that there are no more Star Wars movies coming out?
Yes

New or Updated Intake

You can create a new or updated intake form for a patient who has a previously completed a form. To do this, click the plus (+) sign at the top of the Intake field on the [Patient Profile](#) page:



Intake

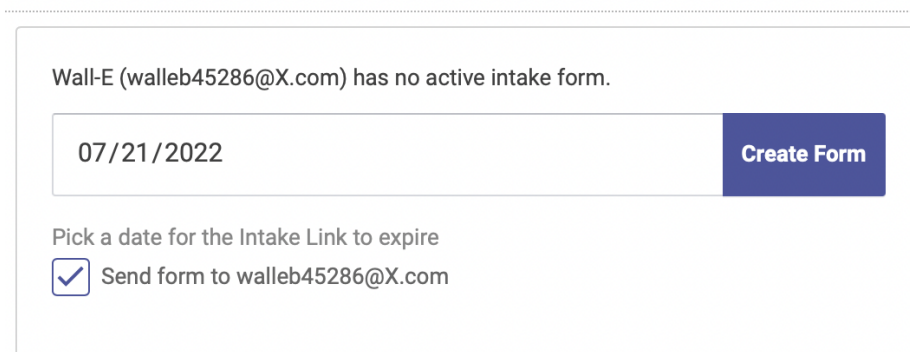
+ ▼

add a new intake form

[ID 106] Intake Answers Submitted Wednesday, December 31 1969

[ID 103] Intake Answers Submitted Thursday, February 17 2022

Then follow the steps to create and send the form to the patient:



Wall-E (walleb45286@X.com) has no active intake form.

07/21/2022 **Create Form**

Pick a date for the Intake Link to expire

☒ Send form to walleb45286@X.com

Revision #3

Created Wed, Aug 12, 2020 7:46 PM by [Alexa Hulsey](#)

Updated Tue, Jun 21, 2022 2:12 PM by [Alexa Hulsey](#)