Intelligent Intake

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What happens if I remove an item from my history template that exists on my Intelligent Intake questionnaire?

Background

It is important to be aware that the Intelligent Intake questionnaires that contain questions that map to historical templates have two components: The actual template in the EMR that the data maps to and the template that the patient fills out on the intake. The patient fills out the intake template and that information is then translated into the history template that the practice uses in the EMR.

It is perfectly acceptable to remove an item from the Intake while still leaving that item in the template found in the EMR. As a matter of fact, this is relatively comment. Usually patients have a far limited set of questions that they can see as part of intake compared to what the practice would have available on the EMR.

The issue arises when a practice decides to remove an element from the History template that also exists on the intake.

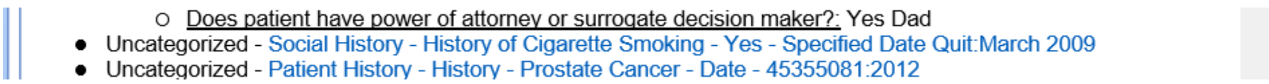
Answer

It is not recommended to remove data points from a history template. The reason behind this is that there may be patient's that already have data saved in these fields. We recommend disabling the field on this History template and removing the field on the Intake template. Our team of template designers can take care of this for you - simply log a ticket here: Log a Support Ticket.

Dig Deeper

A disabled item on a template still exists on the template, the data is still retained, but it can no loner be used. An example is provided below.

If you were to remove the item from the history template, which is not recommended, data would show up as 'Uncategorized' in the note.



Once the History template item has been disabled, that item can then safely be removed from the Intake template.

When the item is removed from the Intake template setup, the next time the intake questionnaire is accessed, that item is removed.

What happens if I remove an item from my encounter based template that exists on my Intelligent Intake questionnaire?

Background

It is important to be aware that the Intelligent Intake questionnaires that contain questions that map to encounter based templates like ROS, HPI, Exams, etc... have two components: The actual template in the EMR that the data maps to and the template that the patient fills out on the intake. The patient fills out the intake template and that information is then translated into the encounter based template that the practice uses in the EMR.

It is perfectly acceptable to remove an item from the Intake while still leaving that item in the template found in the EMR. As a matter of fact, this is relatively comment. Usually patients have a far limited set of questions that they can see as part of intake compared to what the practice would have available on the EMR.

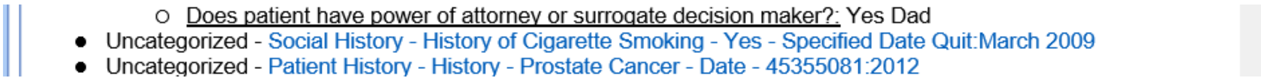
The issue arises when a practice decides to remove an element from the encounter based template that also exists on the intake. Precautions must be taken to ensure this is done correctly to keep the two in sync.

Answer

Removing items from an encounter based template is often times acceptable and is far safer than removing items from a History template. However, it is not always the best strategy. We recommend disabling the field on the template and removing the field on the Intake template. Our team of template designers can take care of this for you - simply log a ticket here: Log a Support Ticket.

Dig Deeper

Because encounter based templates are used over and over, several iterations of that template exist at any given time. Each time a patient comes into the practice, you are likely completing a new encounter (i.e. a new ROS). If an item is removed from an encounter based template, the next time you open a brand new version of that template, the control will be gone as you would expect - no issue there. The problem arises when you attempt to access past versions of the template. If you open a template where a control was used and data was saved, that will now appear as 'Uncategorized' data as seen below. The same problem happens when you attempt to copy a prior template to today's visit. Again, uncategorized data will be produced because the data exists, but has nowhere to go on the screen.



A disabled item on a template still exists on the template, the data is still retained, but it can no loner be used. An example is provided below.

Once the template item has been disabled, that item can then safely be removed from the Intake template.

When the item is removed from the Intake template setup, the next time the intake questionnaire is accessed, that item is removed.

What happens if a remove a template from Intelligent Intake if that questionnaire has already been assigned to patients?

Background

The Intelligent Intake process is most commonly used in conjunction with scheduling appointments. As an appointment is scheduled, many practice's have their system configured to automatically assign an Intelligent Intake Questionnaire to that patient for that appointment. Now that the intake is available to the patient, that individual may take action - start working on the intake, etc... Once a patient has accessed an intake questionnaire, the requirements for that intake are locked in at that point in time for that patient. If a practice makes a decision to change their Intake after it has already been assigned, you may be wondering - what happens in these situations?

Answer

The short answer is that the patient will still be able to complete the intake without issue. However, the experience will vary depending on the scenario:

Scenario 1: *The intake questionnaire is assigned to the patient before the template is removed. The practice decides to remove a template from the intake, but the patient never accesses the intake until after the change has been made.*

In this scenario, there is no issue. The patient simply accesses the intake and, because they have never accessed the intake before, they are only presented with the new version of the intake and the template that was removed is no longer there.

Scenario 2: *The intake questionnaire is assigned to the patient before the template is removed. The practice decides to remove template from the intake, but the patient has already accessed the intake before the change was made.*

In this scenario, the patient will be prompted to fill out the template even though you removed the template. This is because that as soon as a patient opens an intake questionnaire for the first time, these intake requirements are locked in place as they existed at the time the questionnaire was accessed. The patient will be able to fill out the intake, including the removed template, without issue. This data will still be presented to be synced into the chart.

How do I enable the use of Intake Links for Intelligent Intake?

This article describes the benefits, considerations, and setup items for enabling Intake Links for the Intelligent Intake feature. Enabling this within the workflow will allow patients to fill out paperwork and sign up for their patient portal accounts with minimal effort from practice staff.

Key Benefits of Enabling Intake Links

- **Send Intake Links to Patients via Text or Email**
  - Links may be sent to patients manually or automatically to their preferred contact method.
  - Patients will click the link to access the form on any mobile device or computer.
- **Decreased manual creation of My Medical Locker accounts by staff.**
  - Staff creating patient charts only need to enter a phone number or email into the demographics for a patient to receive paperwork that is automatically assigned to an appointment type.
  - No more manually creating Temporary MML accounts or connecting the patient prior to them starting an Intake form.
- **Increased ease of use for patients.**
  - Patients to verify themselves via two-factor authentication and access the link on any mobile device or browser.
  - Since the patient will not need a username or password to access the form, there will be an increased chance of the patient successfully accessing and completing the paperwork prior to their scheduled appointment.
  - A patient may set up their own account at the end of the form and only provide a password to successfully connect themselves to MML. This will make it easier for the patient to access the account in the future.

If the patient completes the setup of their MML account this may count towards the MIPS measure for providing electronic access.

Considerations & Tips

This is a major change to the practice workflow and patient experience. It should not be done without proper preparation and configurations. Be mindful that each practice may be slightly different in current setups and workflow.

- **Test out the process** yourself and experience what that patient sees by setting up test patient accounts in the system.
  - Keep in mind that most intakes were originally built with the intention for the patients to complete forms on a practice-supplied iPad. It is very important that you test each intake form on a mobile device as the formatting may be different than what you would expect on a larger screen. Formatting changes can be made to intakes by submitting a TCRF via support.
- **Read all linked articles** below and those within them to ensure all settings are accounted for.
- **Take into account all situations** where intakes are being filled out:
  - New Patients AND Established Patients
    - At Home
    - In-Office - Waiting Room
    - Back Office (Consent forms / Questionnaires)
    - Manually vs Automatically assigned
    - Completing forms on Mobile device vs practice supplied iPad
    - Modify call center workflows for creating MML accounts
    - Educate staff on upcoming changes

Steps to Complete

1. **Setup Items**
   - Company Settings
     - **NEW** Intake Send Links: Yes/True
     - **NEW** Intake Auto Create Temporary MML Account: Yes/True
     - **NEW** Intake Create MML Account: Yes/True
   - Applicable Role(s)
     - **NEW** Task - Intelligent Intake
     - Intake Assignment
     - Intake Schedule
     - Intake Setup
   - Appointment Reminder Defaults
     - See the "Screen" section
2. **Configuration**
   - Intake Communication Preferences
3. **Testing & Utilization**
   - Setup/Create a test patient with a valid Other Phone and/or Email
   - Manually assign an Intake Link via Intake Assignment
   - Test the intake form using your Mobile device.

Intake on iPad Crashes When Using Camera for Patient Images

Overview

If the a Patient Intake on an iPad closes or exits when taking a photo, but continues to work when uploading a file, the issue is most often related to device settings, browser permissions, or iOS restrictions, rather than the intake workflow itself. It is worth noting that recent iOS or browser updates can modify device behavior or reset permissions without obvious prompts. The checklists below are intended to help resolve common iPad camera issues during intake or to validate where the issue is occurring before opening a support request. You will also find a list of required question/answers to provide for a support case, as well as, suggestions for workarounds.

Support Clarification

OfficeEMR Responsibility

Availability and behavior of the **Patient Intake URL** including form flow, navigation, upload functionality including browser-based camera access when permitted by the device via iPad settings.

Practice Responsibility

OfficeEMR does not manage or configure iPad devices for practices. All iPad setup and security to control device(s) is the responsibility of the practice.

Troubleshooting Checklist

Complete the steps below and record the results before opening a support case.

1⃣ Confirm the Issue Is Camera-Only (Including Photo Upload Test)

Assumptions and iPad Camera Testing Prep Steps:

1. Your intake use the live camera to acquire a Patient Image (headshot/card) but that process fails and your intake session crashes

2. You know how to take a photo and save that image outside of the Intake/browser (will be used to test the camera). *If you don't know how to do this we have steps below to assist you with saving an image on your iPad for testing.*

    If a photo is not already available on the device:

    Create a photo to upload

    1. Exit the intake
    2. Open the **Camera** app on the iPad
    3. Take a photo
    4. Confirm the photo appears in the **Photos** app
    5. Return to the intake
    6. Select **Upload from file** and choose the saved photo

Testing your iPad Camera:

With an image saved on your iPad for testing, do the following:

1. Open the intake on the iPad using the assigned code
2. Proceed to the **Headshot** step
3. Select **Upload from file**

This validates whether image upload works and confirms whether the issue is isolated to live camera access within the intake rather than the intake workflow itself.

2⃣ Check your iPad Guided Access Setup

Go to: **Settings > Accessibility > Guided Access**

- Note whether Guided Access is **ON or OFF**
- If **ON**, temporarily disable it and retest the intake camera

Guided Access can restrict system features such as the camera, particularly after iOS updates.

3⃣ Check If your iPad Is Managed by IT

Go to: **Settings > General > VPN & Device Management**

- Note whether any profiles or organization names are listed
- If profiles are present, the device is managed by IT or running in kiosk mode

Managed or kiosk configurations may restrict browser-based camera access.

4️ Check Safari Camera Settings

Go to: **Settings > Safari > Camera**

- Set to **Allow**
- If already set to Allow, change to **Ask**, wait a few seconds, then change back to **Allow**

The intake runs in a browser; camera access is controlled by Safari, not by an app permission.

5️ Test the iPad Camera

1. Open the **Camera** app
2. Take a photo

If the Camera app does not work, the issue is device- or iOS-level rather than intake-related.

6️ Confirm iOS Version

Go to: **Settings > General > About**

- Record the **iOS version**
- Confirm whether all intake iPads are on the same version

Recent iOS updates may affect camera behavior or permission enforcement.

Determining Intake Issue Responsibility

Using the findings from the six troubleshooting steps, you can determine if a an intake-related issue requiring a support case with iSalus would be appropriate or if this is a device issue that requires your practice IT to resolve:

Strong Indicators of an Intake Issue If All Green Checkmarks are True

- ✅ Safari camera permission is set to Allow ***and*** the iPad camera works on the device outside of our intake process
- ✅ The device is *not restricted* by Guided Access or MDM (or the issue persists outside of those modes)
- ✅ The issue occurs *consistently* when the intake attempts to invoke the camera
- ✅ The issue occurs on *multiple devices* with the same setup
- ✅ AND ideally *other practices report the same behavior (not required but strengthens notion that it is an Intake*

issue)

Strong Indicators the issue is not intake-related if:

- The native Camera app fails outside of our Intake process
- Camera permissions are blocked or restricted
- The device is locked in kiosk / MDM mode
- The issue resolves when running outside restrictions
- File upload testing works consistently
- Only a single practice or device is affected

If a Support Case Is Opened

Include the following information in the support request to assist with determining whether an intake-level issue exists:

Required Question/Answers

- Number of iPads used for intake
- Whether the issue affects **all devices or only some**
- iOS version (and whether it is the same on all devices)
- Guided Access status (ON or OFF)
- VPN & Device Management status (profiles listed or none)
- Safari Camera setting (Allow / Ask)
- Native Camera app result (Works / Does not work)
- Approximate **date and time** of the most recent crash

  Important: Include your Troubleshooting Step results

- Step 1 - Upload from file and choose the saved photo - Success or No Success?
- Step 2 - Guided Access is ON or OFF?
- Step 3 - VPN & Device Management Note whether any profiles or organization names are listed or advise NONE.
- Step 4 - Confirm Camera Settings set to Allow? Confirm you toggled to Ask then back to Allow without success?

- Step 5 - Confirm that camera app works outside of the intake and you can successfully save an image on your iPad?
- Step 6 - What is your iOS version (list for each device or indicate same if same as previous recorded device)

Workarounds

Send Intake Link to Patient's Mobile Device (most ideal)

As an alternative, the intake may be sent to the patient to complete on their **personal mobile device**, which typically avoids kiosk or iPad restrictions.

Instructions for sending the intake link via text are available here:
https://officeemr.knowledgeowl.com/help/send-an-intake-link-to-a-patient-via-intake-assignment

Upload Photo from Device

If live camera access fails, intake may continue by:

- Taking a photo using the **Camera** app
- Uploading the saved photo using **Upload from file**