

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

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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.
