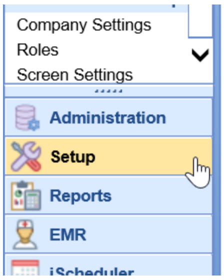
Create a New Intake Form

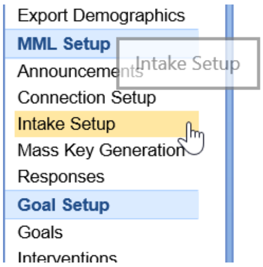
Last Modified on 05/31/2024 2:42 pm EDT

To create a new Intake form that can be assigned to patients and appointments, follow the steps below:

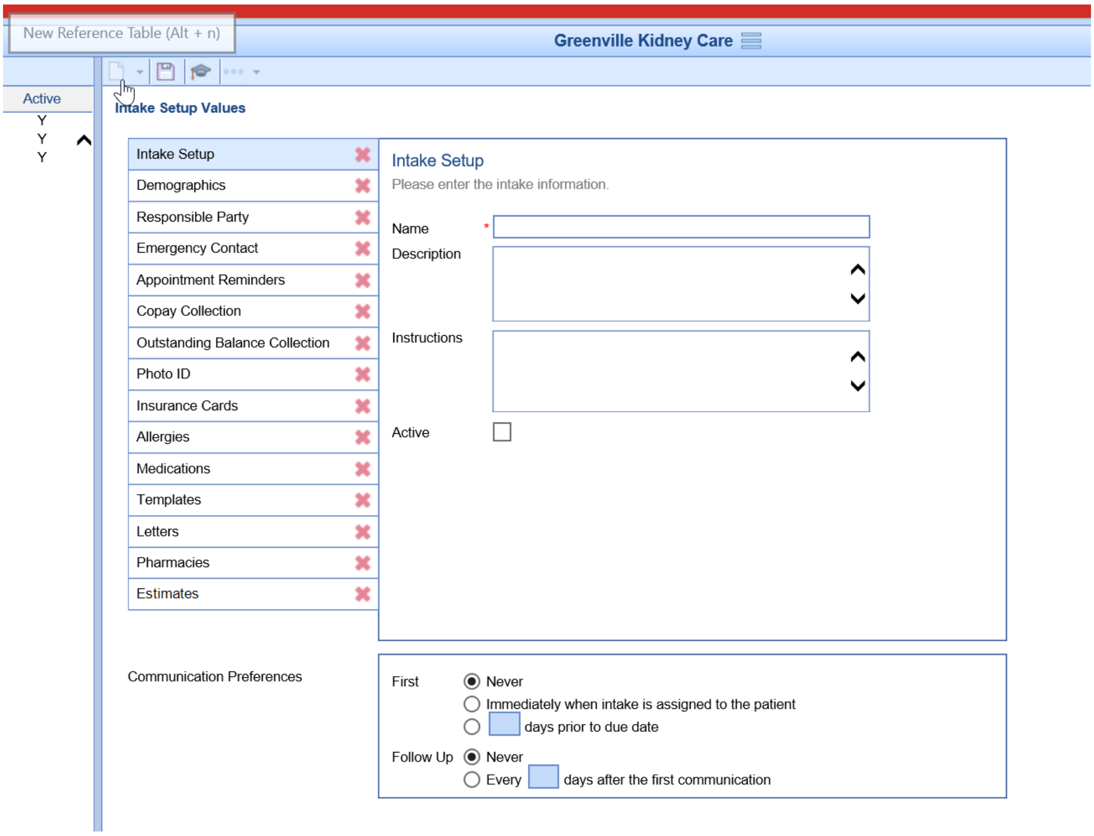
1. Navigate to the **Setup** portal.



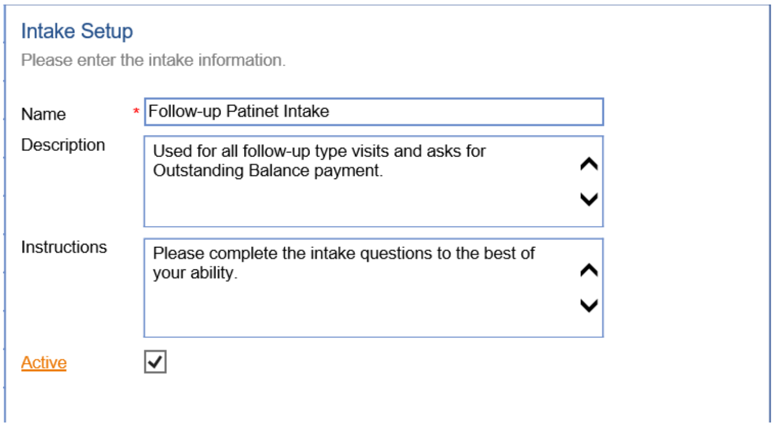
2. Select **Intelligent Intake** from the list of setup screens.



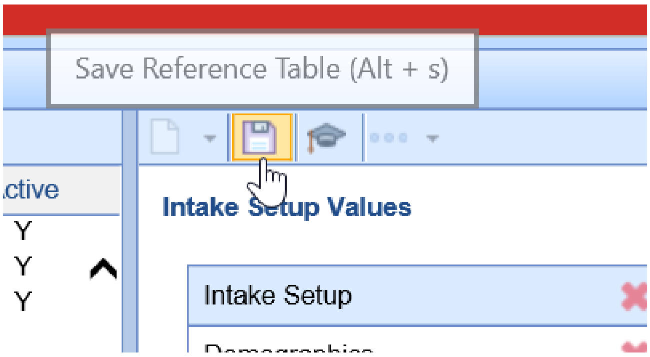
3. By default, the work area on the right will be blank. If it is not, click the **New** button.



4. Give the Intake form a **Name**, **Description** for when it's used, **Instructions** for the patient, and select the **Active** checkbox.



5. Click the **Save** button to create the intake form.



6. You are now ready to setup the intake form's fields.

Intake Setup Field Definitions

- **Name**: This is the name of the intake. This is seen by the patient when completing the intake. This is also seen by the practice staff when assigning the intake.
- **Description**: This is an internal description of this intake and is used to provide guidance to the staff on when/how this is used within your workflow.
- **Instructions**: These are instructions for the patient. They will show up when completing the intake.
- **Active**: The active indicator determines if this intake is available to assign to appointments and/or patients.