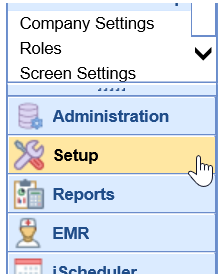


Create a New Intake Form

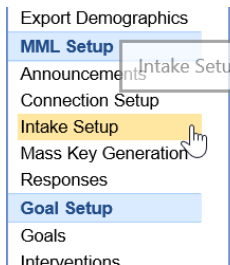
Last Modified on 05/31/2024 2:42 pm EDT

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.

A screenshot of the 'Intake Setup Values' form. The form is titled 'Intake Setup Values' and contains the following fields:

- Intake Setup** (Title)
- Demographics** (Title)
- Responsible Party** (Title)
- Emergency Contact** (Title)
- Appointment Reminders** (Title)
- Copay Collection** (Title)
- Outstanding Balance Collection** (Title)
- Photo ID** (Title)
- Insurance Cards** (Title)
- Allergies** (Title)
- Medications** (Title)
- Templates** (Title)
- Letters** (Title)
- Pharmacies** (Title)
- Estimates** (Title)

The form also contains the following fields:

- Name** (Text input field)
- Description** (Text area)
- Instructions** (Text area)
- Active** (Checkbox, checked)

Communication Preferences:

- First** (Radio buttons): Never, Immediately when intake is assigned to the patient, [] days prior to due date
- Follow Up** (Radio buttons): Never, Every [] days after the first communication

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

Intake Setup
Please enter the intake information.

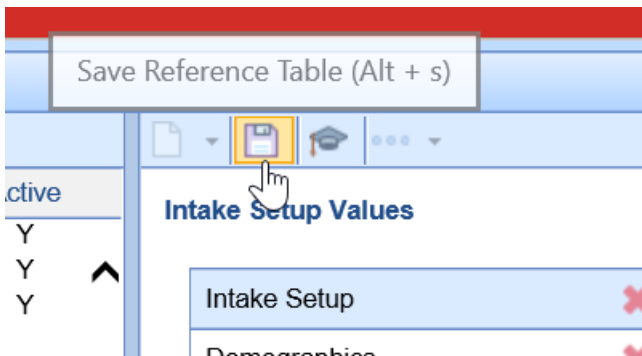
Name * Follow-up Patient Intake

Description Used for all follow-up type visits and asks for Outstanding Balance payment.

Instructions Please complete the intake questions to the best of your ability.

Active

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.
-