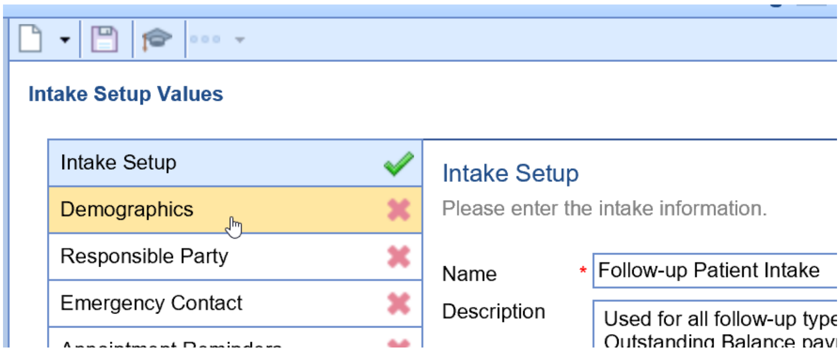
Setup a New Intelligent Intake Form

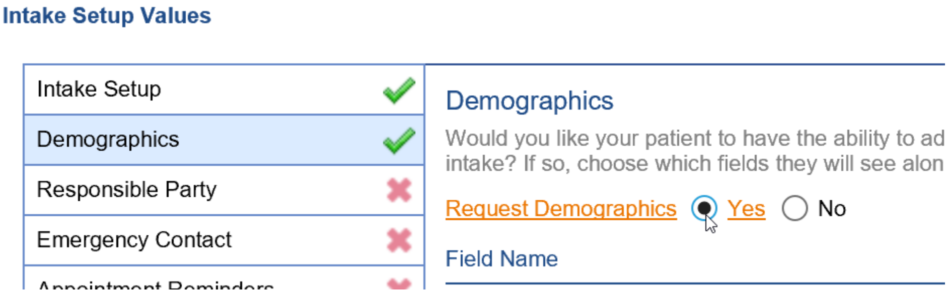
Last Modified on 05/31/2024 3:38 pm EDT

Follow these steps to setup a new Intelligent Intake form:

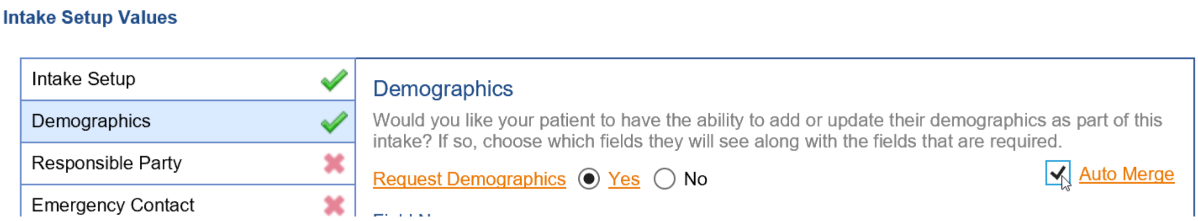
1. Create a new Intelligent Intake form.
2. Click on the **Demographics** section tab.



3. Select the **Yes** option to request patient demographics for this intake form.

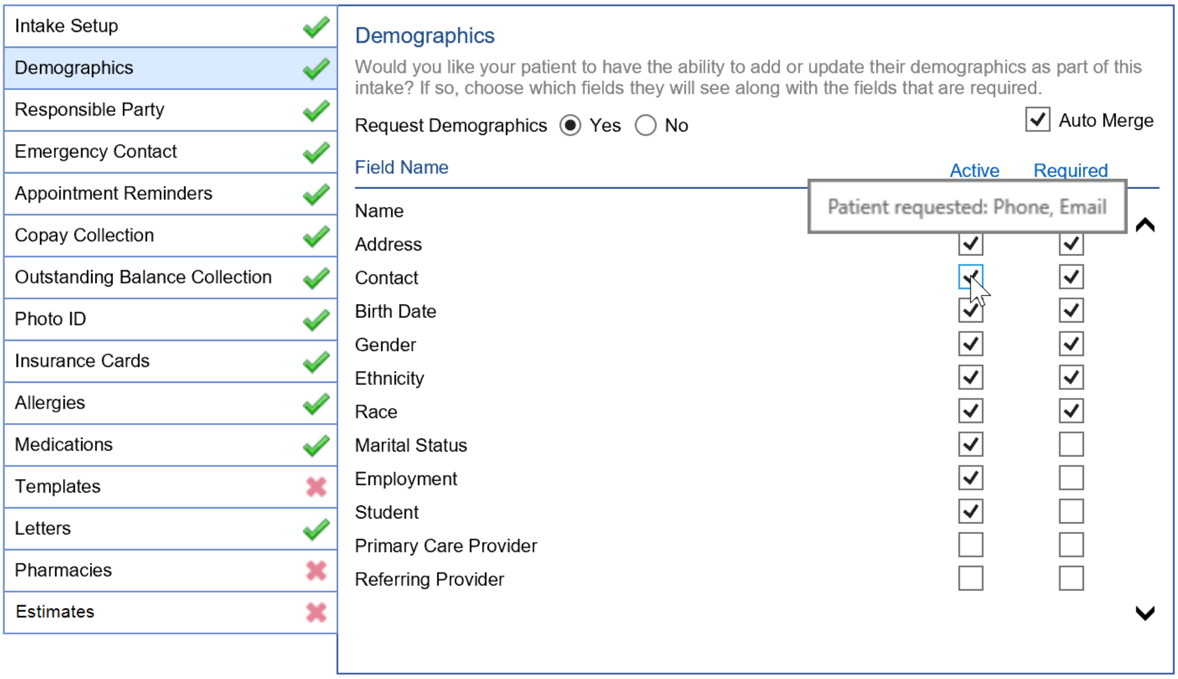


4. Check the **Auto Merge** checkbox to automatically merge the demographic information captured in this intake form into the patient's chart. If you prefer to review the demographics captured on this intake before merging, keep the Auto Merge checkbox de-selected.



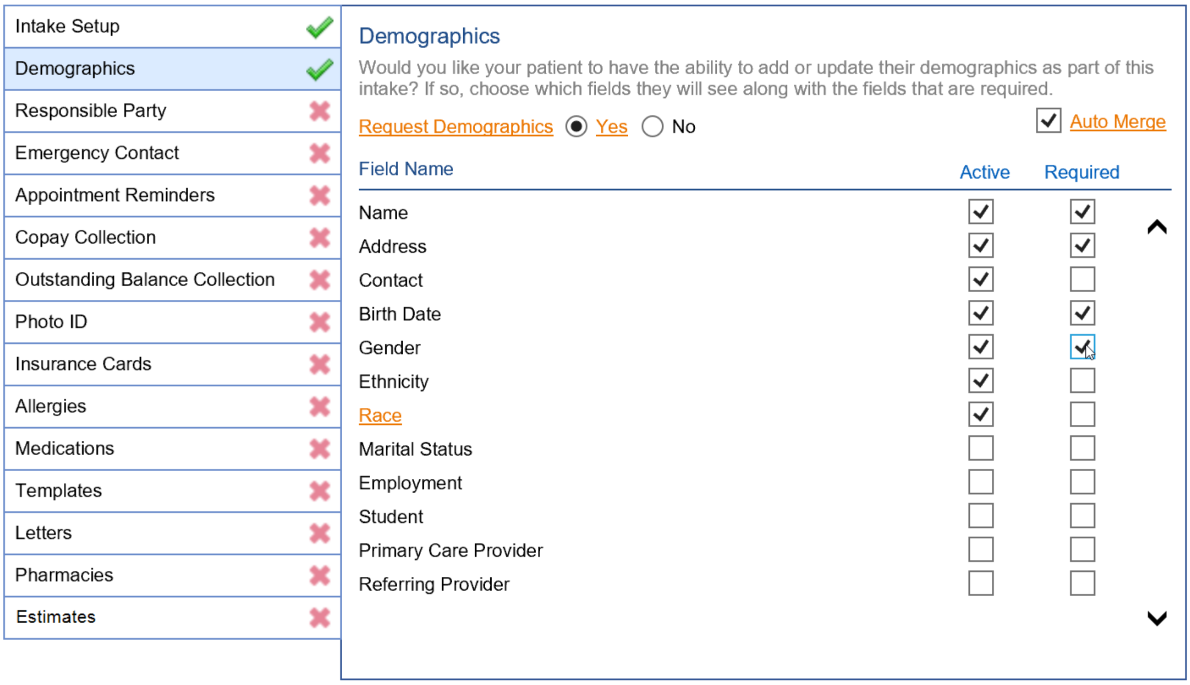
5. Select the **Active** checkbox next to the demographic fields you wish to capture on this form. When you hover over the checkbox, the individual fields captured will display in a tooltip.

Intake Setup Values

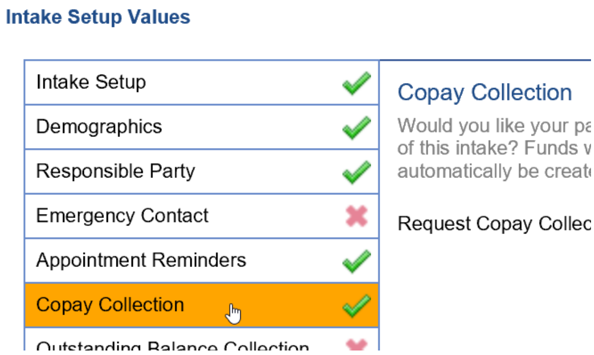


6. Check the **Required** checkbox next to the demographic fields you wish to require on this form.

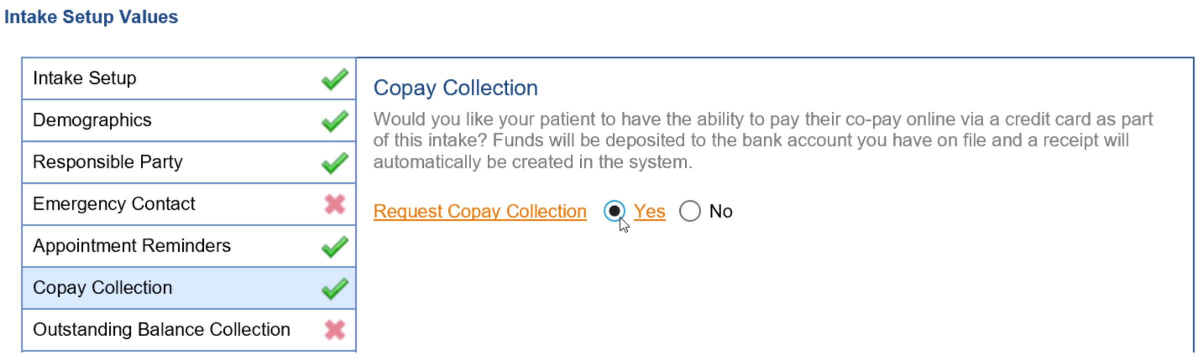
Intake Setup Values



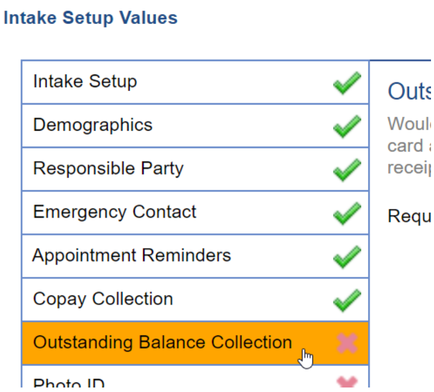
7. Repeat steps 6-8 for the Responsible Party, Emergency Contact, Appointment Reminders, Allergies, Medications and Pharmacy sections.
8. Click on the **Copay Collection** tab.



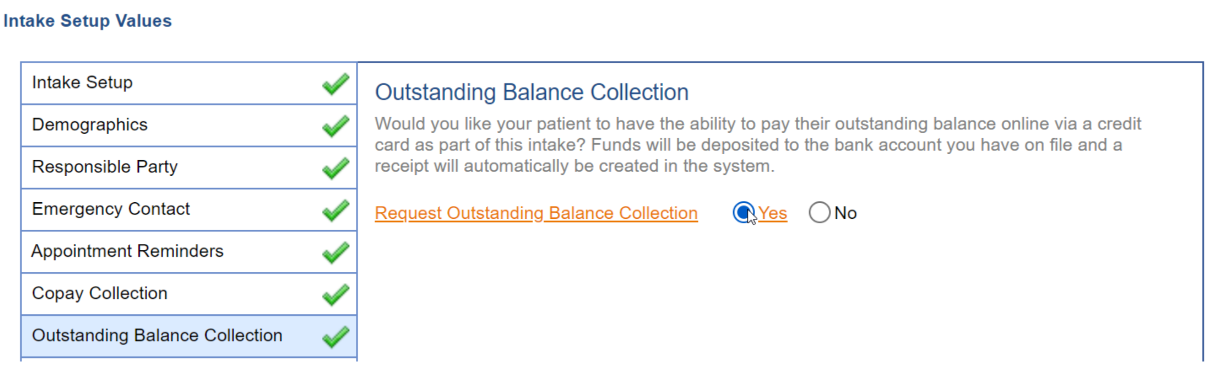
9. Select the **Yes** option to give patients the ability to pay their copay on this form. This requires integrated credit card payment with our vendor PaySimple. See Overview of Credit Card Processing with PaySimple guide to learn more about setting this up.



10. Click on the **Outstanding Balance Collection** tab.



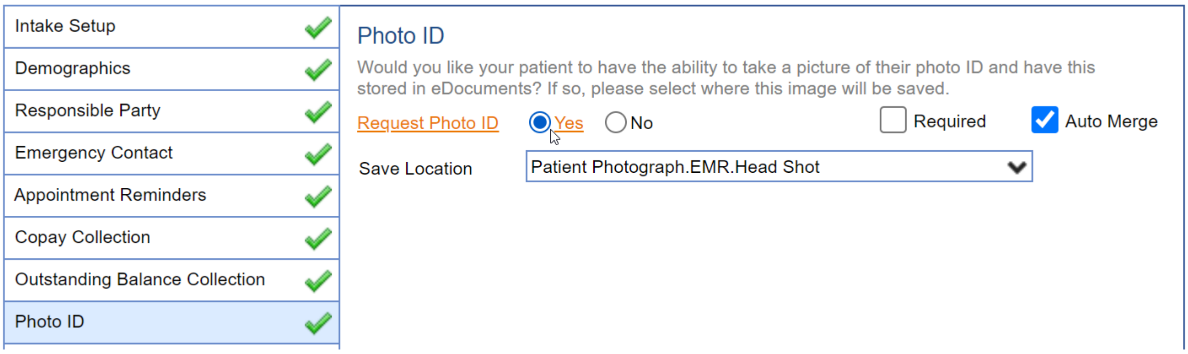
11. Select the **Yes** option to give patients the ability to pay their outstanding balance on this form. This requires integrated credit card payment with our vendor PaySimple. See Overview of Credit Card Processing with PaySimple guide to learn more about setting this up.



12. Select the **Photo ID** tab. Select the **Yes** option to request the patient's photo ID. Check the

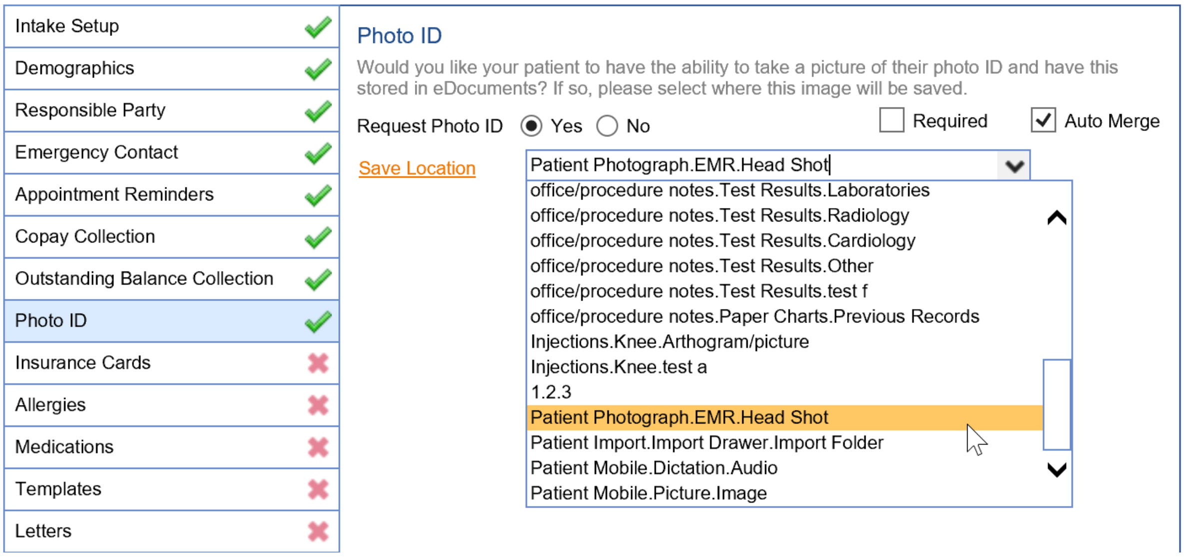
Required checkbox to require the patient's Photo ID. Click on the **Auto Merge** checkbox to automatically merge the patient's shared photo into his/her chart.

Intake Setup Values



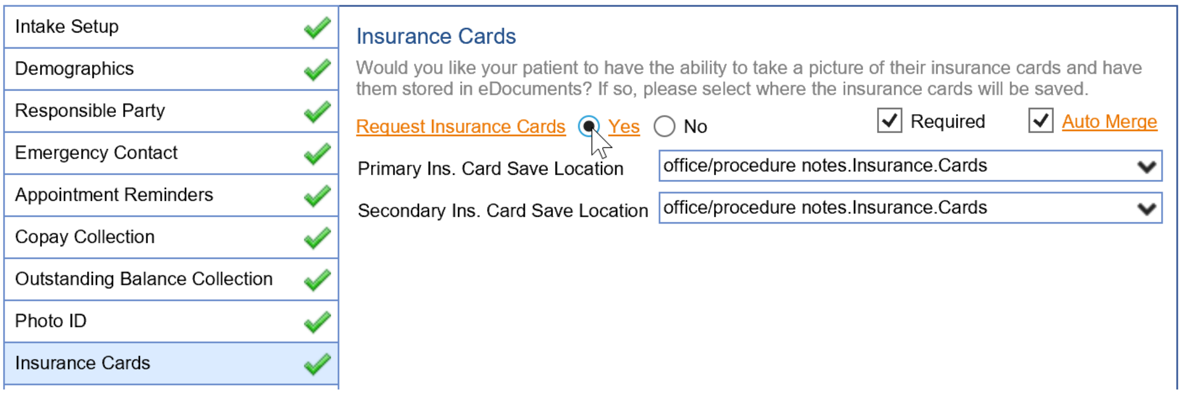
13. Set the **Save Location** to the appropriate eDocuments folder the patient's photo ID should save to.

Intake Setup Values



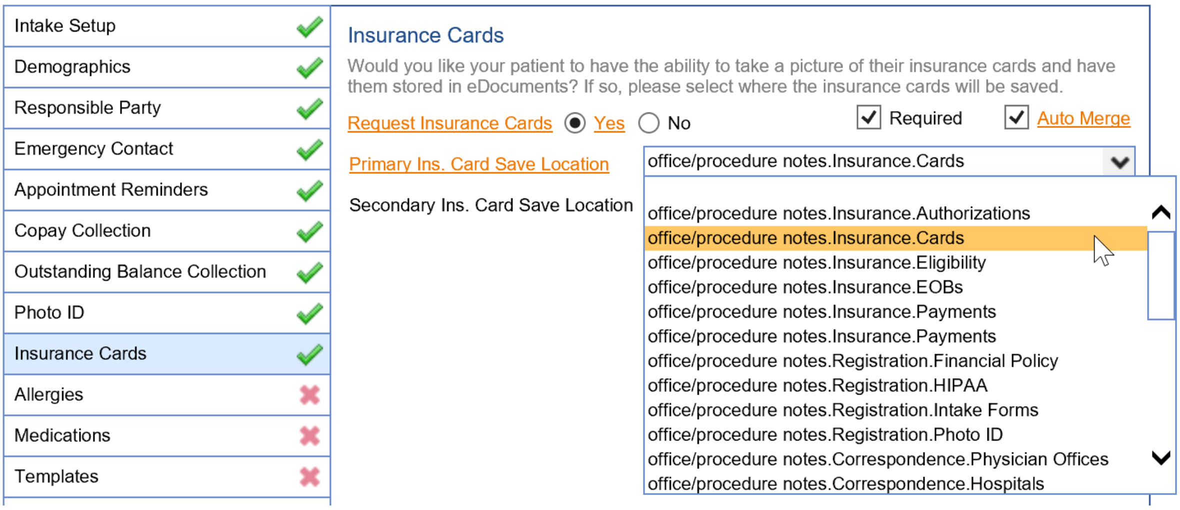
14. Press the **Insurance Cards** tab. Select the **Yes** option to request the patient's insurance cards. Check the **Required** checkbox to require the patient's Insurance Cards. Click on the **Auto Merge** checkbox to automatically merge the patient's shared insurance cards into his/her chart.

Intake Setup Values



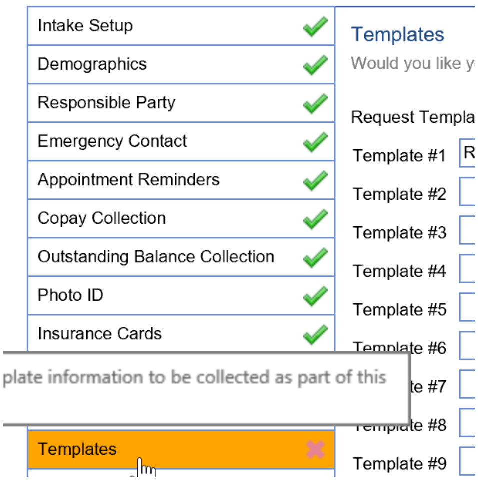
15. Set the **Primary Ins. Card Save Location** and **Secondary Ins. Card Save Location** to the appropriate eDocuments folder the patient's insurance cards should save to.

Intake Setup Values

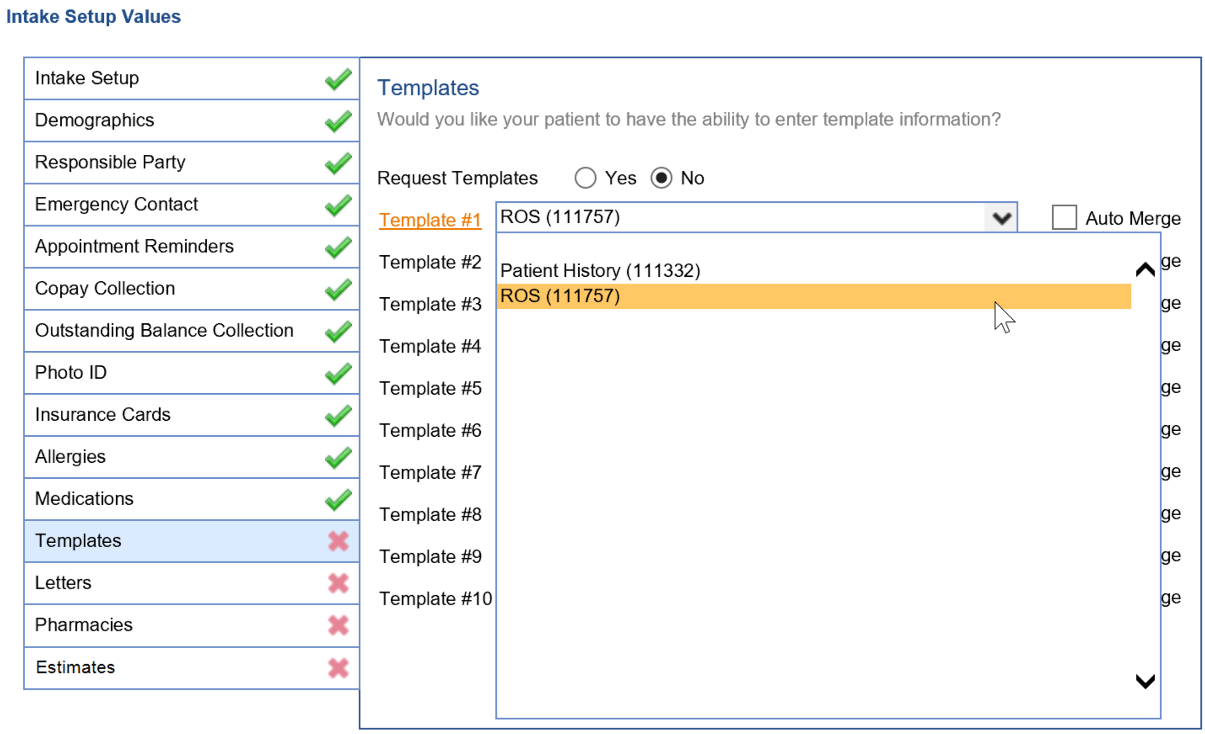


16. Click on the **Templates** tab. This is where practices select which template/s patients need to fill out as part of this intake. Complete a Template Change Request Form to create additional Intake templates.

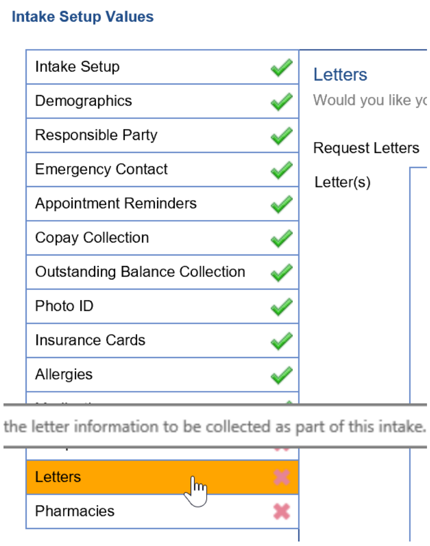
Intake Setup Values



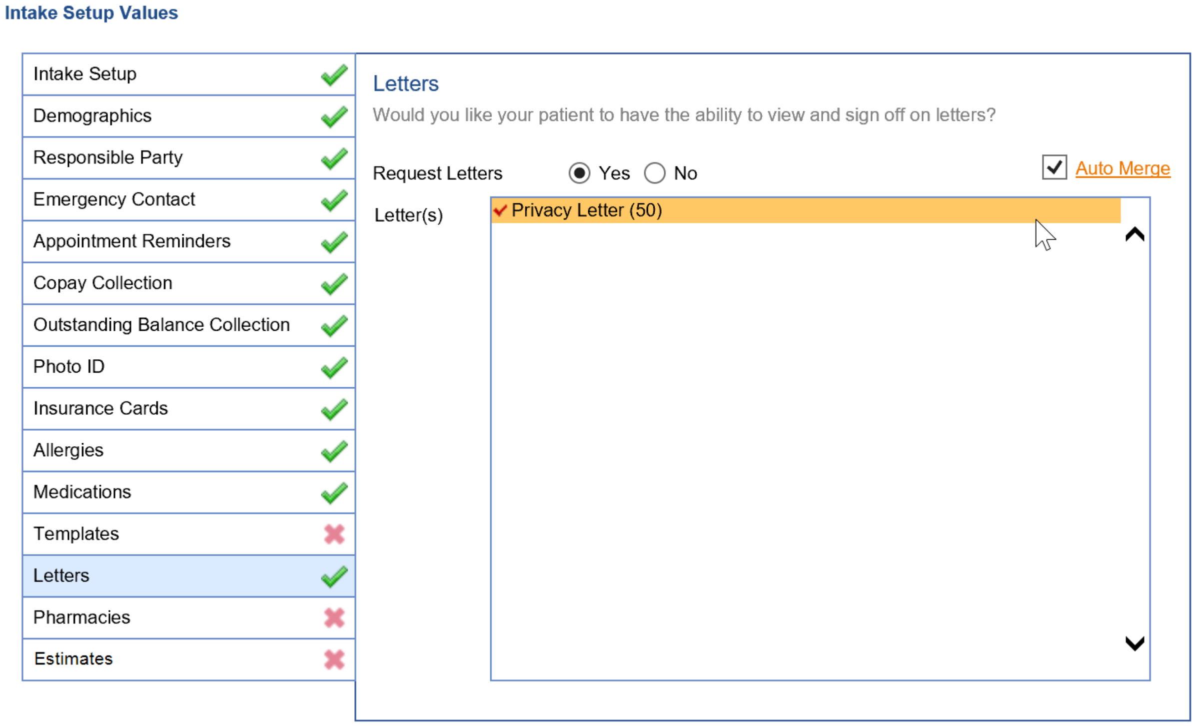
17. Select the **Template # 1** drop down to select which template/s are a part of this intake. Select the **Auto Merge** checkbox to automatically merge the collected template data into the patient's chart.



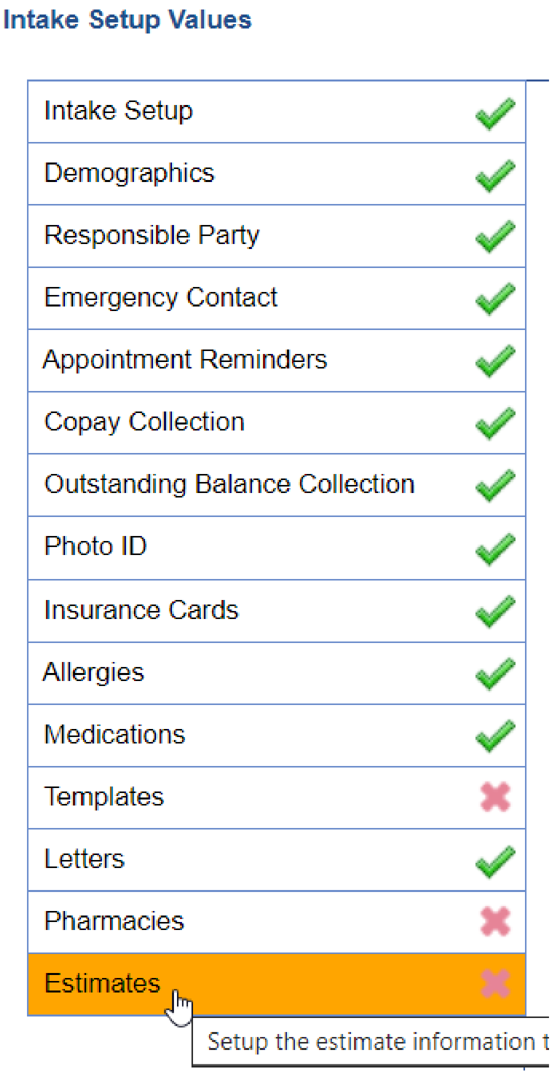
18. Click on the **Letters** tab.



19. Set the Request Letters option to **Yes** to capture patient letters. Then select which **Letter(s)** you wish to have signed for this intake. Click the **Auto Merge** checkbox to automatically merge the signed letters into the patient's chart. Complete a Template Change Request Form to create additional Intake Letters.

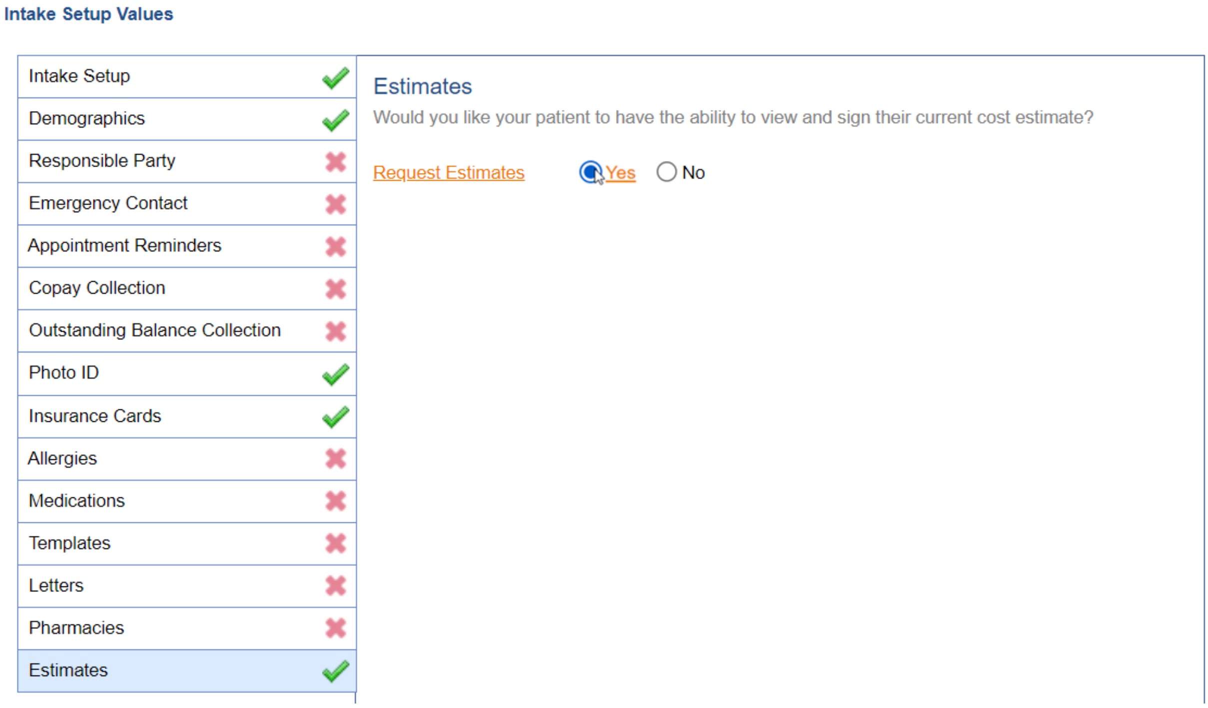


20. Click on the **Estimates** tab.



21. Select the **Yes** option to give patients the ability to view their cost estimate(s). In order for the cost

estimate(s) to be displayed within the intake the estimate(s) must be in an Accepted status. The patient will than be displayed the estimate that matches the intake appointment date of service. It will also allow the patient to electronically sign the estimate.



22. Set the Communication Preferences for the Intake.
23. Press the **Save** button to save the Intake you just created.