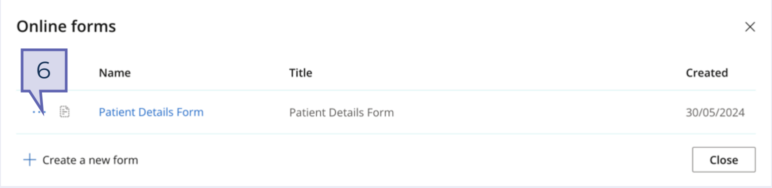
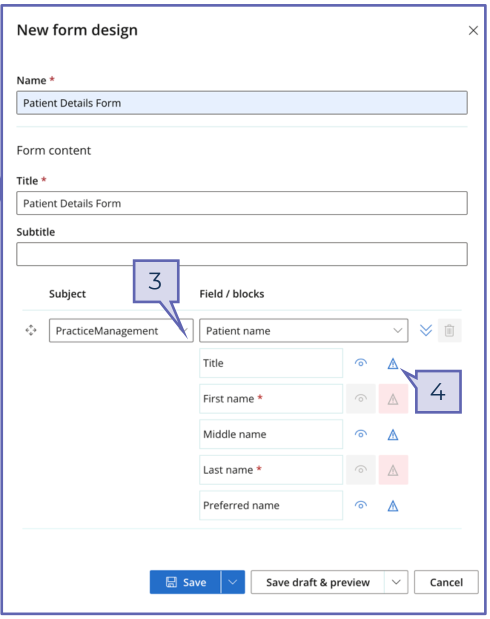
Create and Send Online Forms

Create custom online forms

1. Go to **Admin** > **Online Forms** > **Create a new form.**
2. Fill out **Name** (for internal use), **Title** (what the Patient will see) and **Subtitle** (additional information you'd like the Patient to see).
3. Select the set of form inputs.
4. Adjust which fields will be visible to the client: show, hide, required, not required.
5. Save the form.
6. Click the ellipses (...) > **Publish** to make the form active.





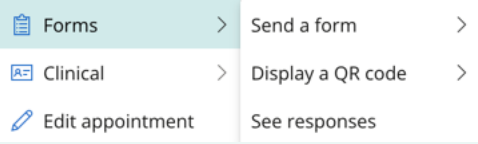
Forms are available based on the **context** of the form elements. For example, Claim context forms are available to send with ACC45 forms. Forms with multiple contexts are available in all areas.

Send online forms

In the appointment book, right-click on the patient > **Forms** > Send as a **form** or display as a **QR code**.

OR

Click on the appointment >



To send an ACC45 form:

Create an appointment > **Condition setup** > **Send a link** or **Generate a QR code**.

or

Click on the appointment > . If there is an associated claim, the form will be in the list.

or

Right-click on the patient > **Forms**