

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.

Name	Title	Created
Patient Details Form	Patient Details Form	30/05/2024

+ Create a new form

New form design

Name *
Patient Details Form

Form content

Title *
Patient Details Form

Subtitle

Subject **3** Field / blocks

PracticeManagement Patient name

Title

First name * **4**

Middle name

Last name *

Preferred name

Save Save draft & preview Cancel

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 >

- Forms > Send a form >
- Clinical > Display a QR code >
- Edit appointment See responses

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**

Condition setup for Val Bash

Condition type *
Claim Private

Referred in
No

Insurer *
ACC - Accident Compensation Corporation

ACC45
Send a link Generate a QR code

Save Cancel