updox

Electronic Forms

A quick guide to help

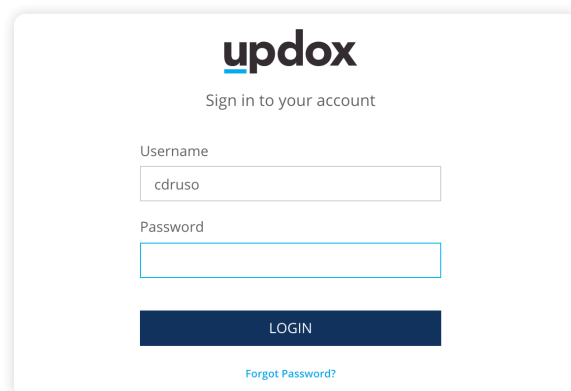get you started.

How to use Updox Electronic Forms

A quick guide to get your practice using Electronic Forms today.
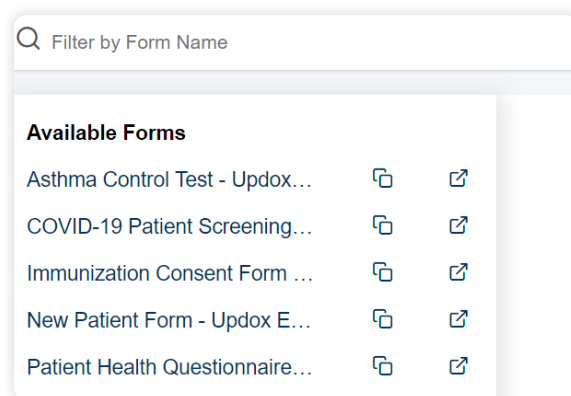
1

Log in to Updox

Enter your username and password to log in to your Updox account.

updox

Sign in to your account

Username

cdruso

Password

LOGIN

Forgot Password?

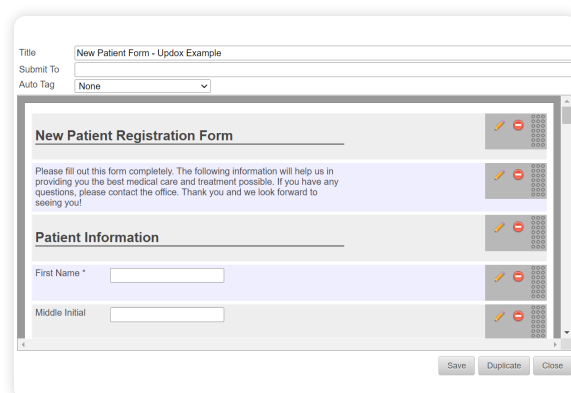**2**

Access the Forms Library

An easy way to get started is to access the Forms Library. To browse and copy Updox Sample Forms into your account, select Menu > Home Browse > Updox Sample Forms.

Filter by Form Name

Available Forms

Asthma Control Test - Updox…

COVID-19 Patient Screening…

Immunization Consent Form …

New Patient Form - Updox E…

Patient Health Questionnaire…

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Creating or editing a Form

To edit a sample form or create a new form for your practice, select Menu > Admin > Form Management.

Title   New Patient Form - Updox Example
Submit To
Auto Tag   None

New Patient Registration Form

Please fill out this form completely. The following information will help us in providing you the best medical care and treatment possible. If you have any questions, please contact the office. Thank you and we look forward to seeing you!

Patient Information

First Name *

Middle Initial
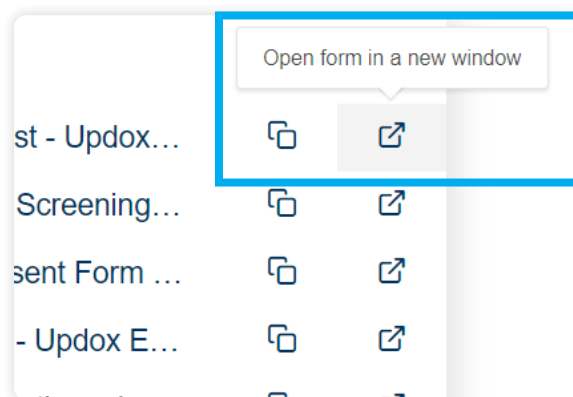
Save   Duplicate   Close

Did you know?

You can send specific forms, such as clinical or billing, to a queue to quickly route the information to the right people. You also have the ability to auto-tag a form when it lands in your inbox.

How to use Updox Electronic Forms

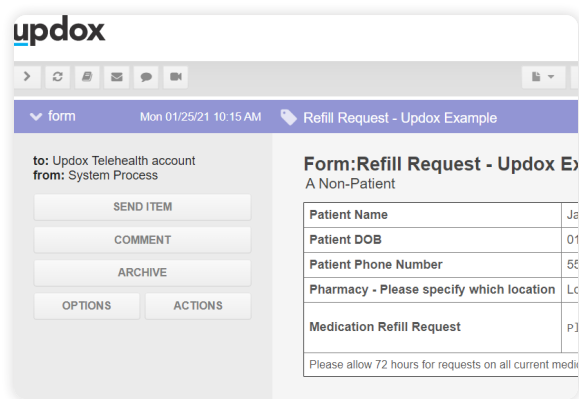## A quick guide to get your practice using Electronic Forms today.

Sending a Form

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Each form will have a unique URL that canbe sent to patients via Updox Text, Broadcast or posted to your practice website. To accessthe form URL, choose Forms Library from the Menu, and click on the double square icon.

Receiving a Form

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When a patient submits a form, it will be available in the Updox inbox. You can then route it to another team member or send it to your patient's chart.You can also preview the form by choosing the arrow icon.

Did you know?

You can ask for patients to upload images or include signatures on your Updox Forms or include a star rating for post-appointment surveys.

How to use Updox Electronic Forms

Under standing field properties for Electronic Forms.

1. Single-Line Text

Allows user to enter in one or two words

2. Multi-Line Text

Allows user to enter a multi-line free text response

3. Date Picker

Allows user to select a date from a calendar

4. Label/Instructions

Labels or instructs user without requiring a response

5. Section Heading

Labels/names the section of questions for the user

6. Spacer

Creates a space between items

7. Checkbox

Allow user to check one box (ex. "I agree to this statement")

8. Drop-down List

Allows user to select one item from a drop-down list

9. Radio Button List

Allows user to select one item from multiple options

10. Check Box List

Allows user to check multiple boxes

11. Star Rating

Allows user to select a 1 to 5 star rating

12. Signature

Allows users to provide digitally sign the form

13. Image Upload

Allows user to capture or upload an image from a device

14. Link

Allows user to click on a hyperlink

Field Properties

Type:
Label:
Required:
Description

✓ Single-Line Text
Multi-Line Text
Date Picker
Label/Instructions
Section Heading
Spacer
Check Box
Drop-down List
Radio Button List
Check Box List
Star Rating
Signature
Image Upload
Link