Forms and consents, start to finish

A visit is booked, its paperwork goes out, the patient fills it in at home or on a tablet, and the answers come back to you. Here is every step, and what your team signs.

Feature manual · For Owners, Managers, Front desk, Providers, Nurses and MAs · aminova.health/university/forms-and-consents-flow

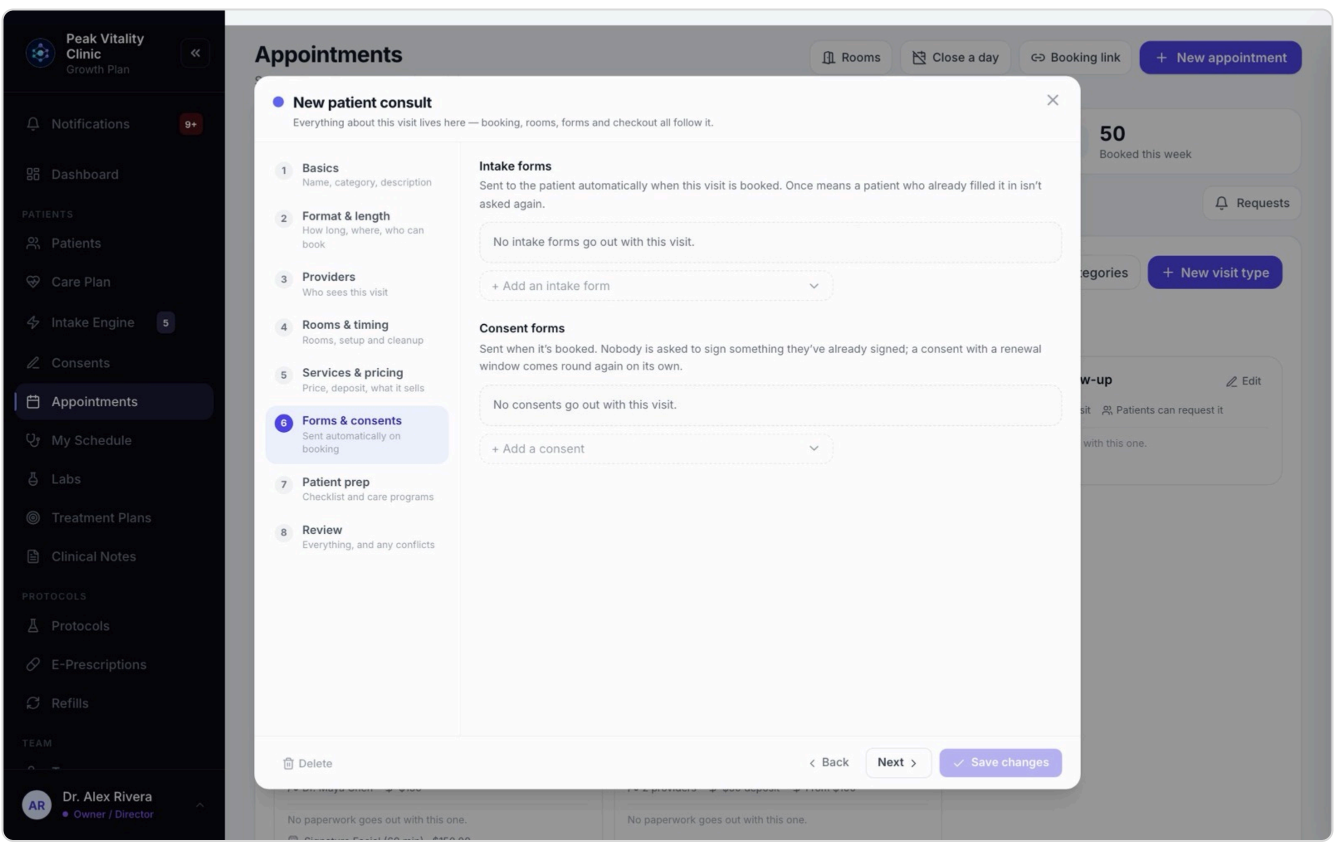
1. WHAT IT IS

There are two kinds of paperwork. Intake forms are questions, like a health history. Consents are documents the patient signs, like a treatment consent.

You set both up once, then attach them to each visit type. From then on, booking a visit sends the right paperwork, the patient fills it in, and it comes back to you, ready to review.

2. THE VISIT TYPE DECIDES WHAT GOES OUT

1. Open a visit type from **Appointments → Visit types** and go to **Forms & consents**.
2. Add the intake forms and the consents that belong to this visit.
3. For each intake form, choose **Once** or **Every visit**.



Forms & consents on a visit type — empty here until you press Add an intake form or Add a consent.

3. A VISIT IS BOOKED, AND THE PAPERWORK GOES OUT

1. When the visit is booked, by your team, in the patient app or on your booking link, its forms and consents are sent.
2. Anything the patient already signed or filled in is skipped. A form set to **Every visit** goes each time, and one that is due for renewal goes again.
3. The patient gets one email that lists the new forms to fill in and sign.
4. Booked on your booking link with a deposit? The paperwork goes out once the deposit is paid.

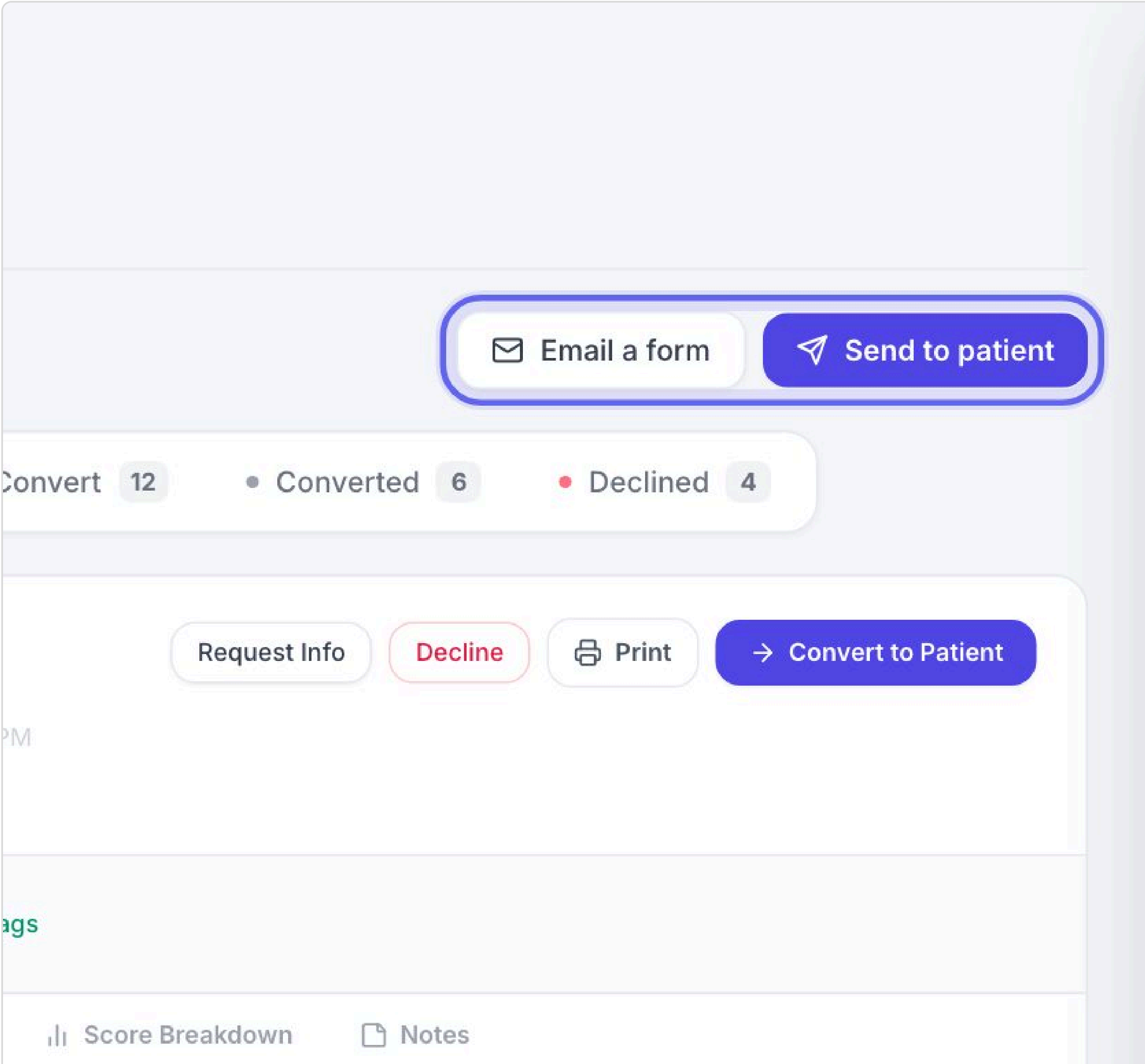
> **Tip.** A practice patient (green **Practice patient** badge) is never emailed.

4. WHAT THE PATIENT SEES

1. In the email, each intake form has its own link. It opens on their phone with no app and no account, and works for 30 days.
2. Consents are signed in their patient app. On its home screen, **Forms to complete** lists their intake forms, and **Consents** lists what to sign.
3. They tap **Start** on a form, answer, and tap **Send to my clinic**. Their answers are saved as they go, so they can stop and **Continue** later.
4. For a consent they tap **Review & sign**. Signed consents stay in their app under **Account → Consent Forms**.

5. SENDING PAPERWORK BY HAND

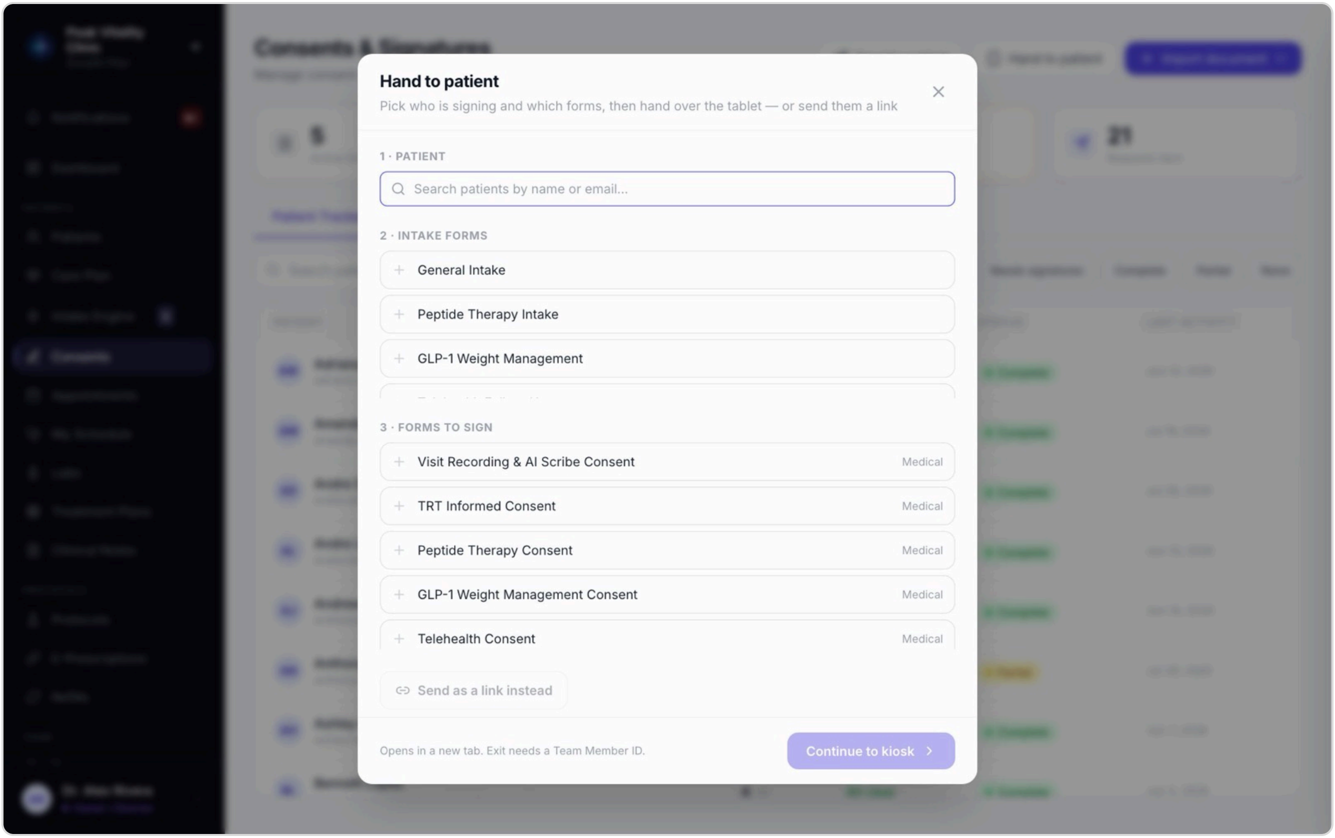
1. **Send to patient**, on the Consents page or in Intake results, sends one patient any forms you pick.
2. On an appointment, the **Forms** section has a **Send** button for that patient.
3. On a patient's chart, **Forms & Files** has **Send forms**.
4. **Email a form**, in Intake results, sends an intake form to anyone by email, even someone with no chart yet.



Email a form and Send to patient, at the top of Intake results.

6. IN THE OFFICE: HAND OVER THE TABLET

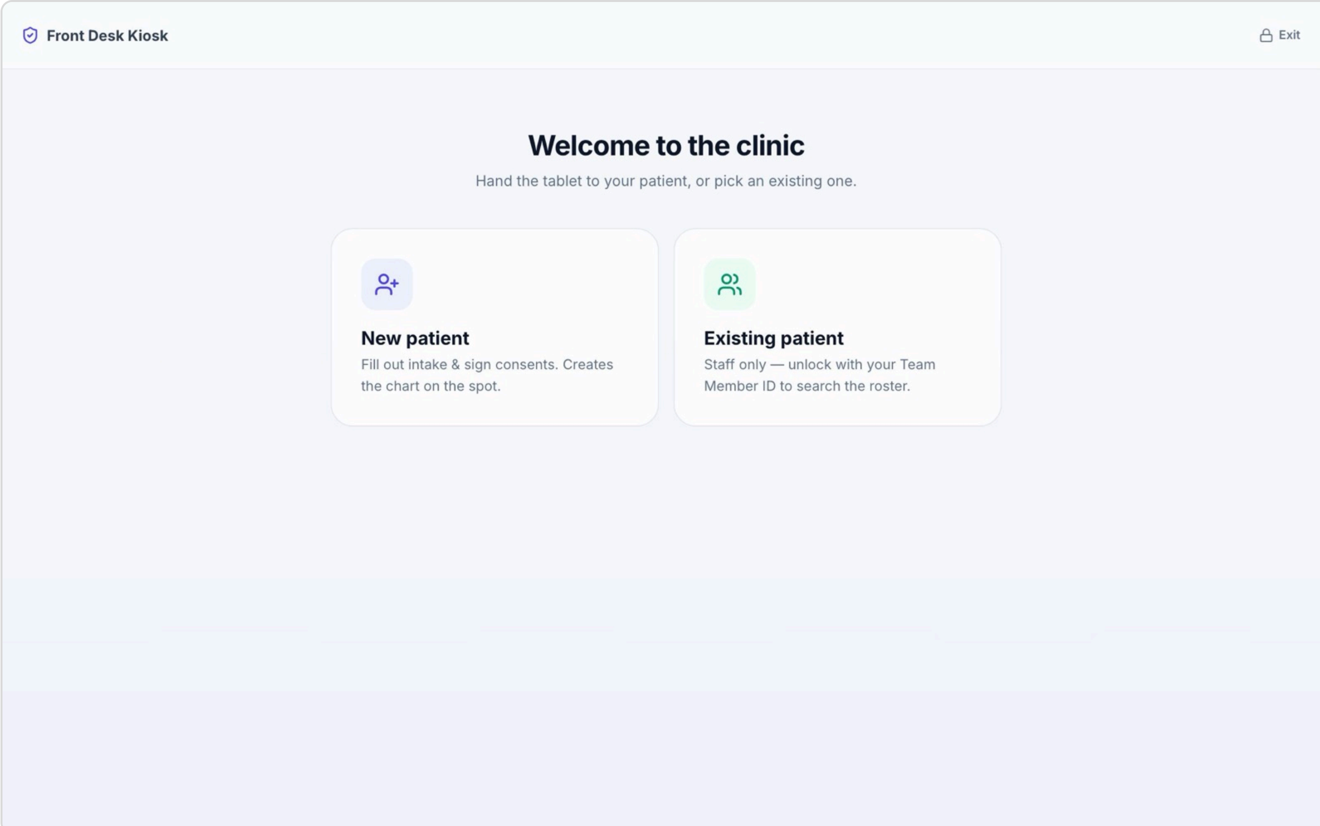
1. On the Consents page, click **Hand to patient**. On My Schedule, the visit's **Forms** card has the same button, with that patient and the consents they owe already chosen.
2. Pick the patient, then the intake forms and the consents, in the order you want them. Intake forms always come first.
3. Press **Continue to kiosk** and hand over the tablet. Or press **Send as a link instead** for someone who isn't there.



Hand to patient: who is signing, and which forms, in order.

7. ON THE TABLET

1. The patient sees only the forms you picked, one after another, with how many are left.
2. Opened on its own, the tablet offers **New patient**, which fills in intake and makes their chart on the spot, and **Existing patient**, which staff unlock with their **Team Member ID**.
3. If they can't finish a required form, **I can't finish — hand back to the front desk** tells your team what is still unsigned.
4. Left untouched, it asks **Still there?**, then clears itself so the next person can't see anything. Leaving the tablet screen needs a **Team Member ID**.

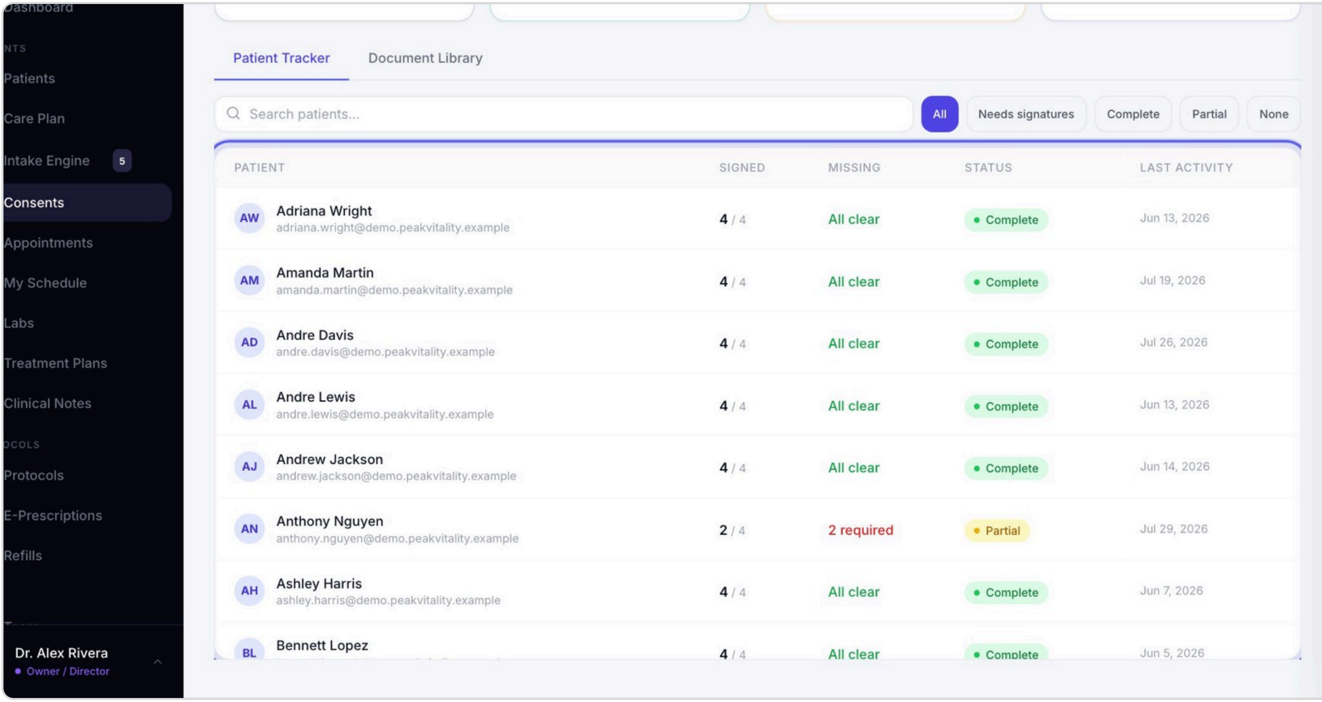


The tablet's welcome screen: a new patient, or an existing one.

Tip. No internet for a moment? The tablet keeps what was filled in and sends it when the connection is back.

8. KEEP TRACK OF WHO HAS DONE WHAT

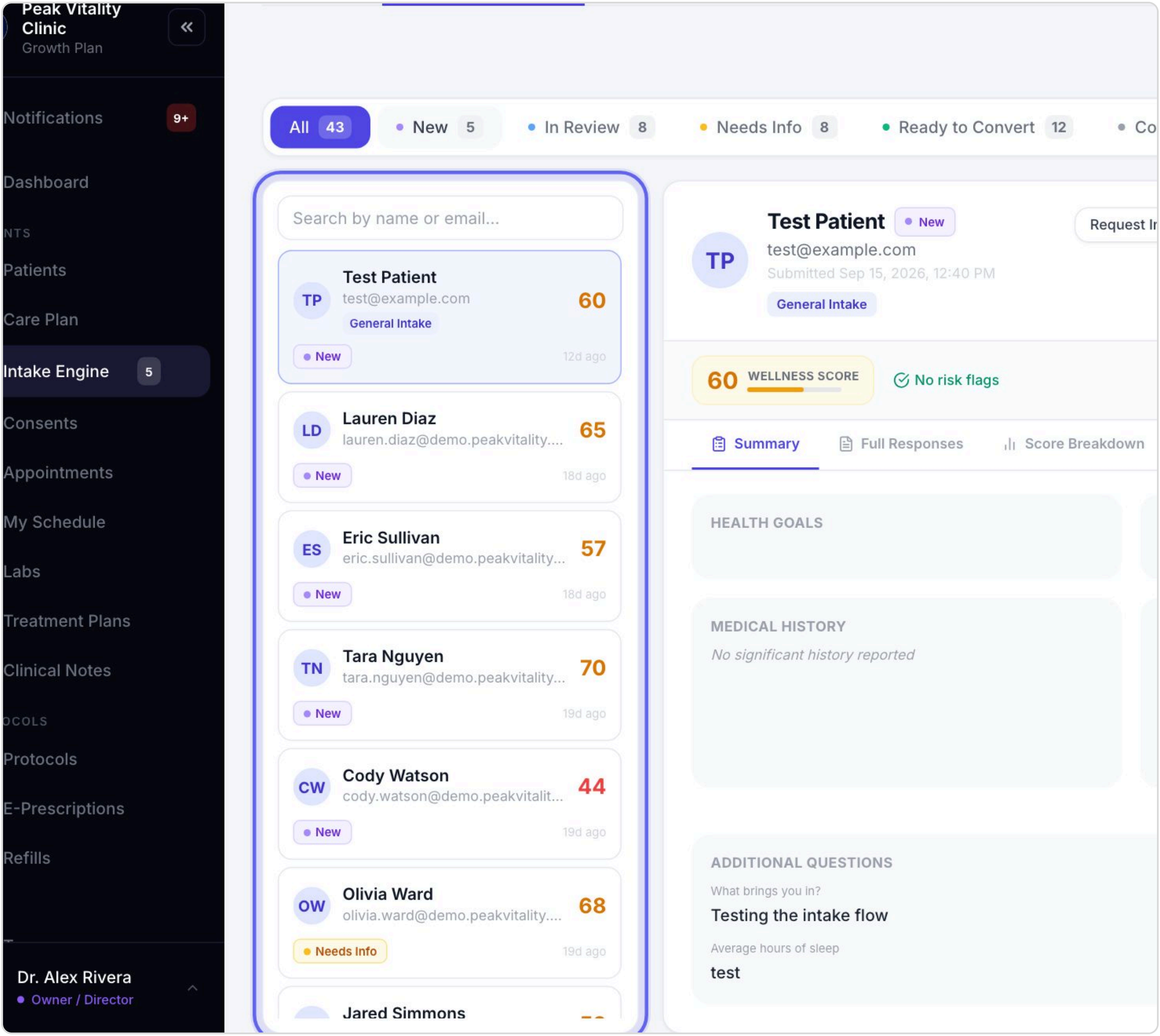
1. Open an appointment. Its **Forms** section shows each form as **Done**, **Opened**, **Waiting** or **Not sent**, and how many are outstanding.
2. On the Consents page, the **Patient Tracker** shows every patient's signed and missing consents.



The Patient Tracker: who has signed, and who still owes a form.

9. WHERE INTAKE ANSWERS LAND

1. Every intake form that comes back lands in **Intake Engine → Intake results**.
2. A form your clinic sent to a patient arrives already on their chart.
3. A form from your website link, or emailed to someone new, arrives on its own. You **Convert to Patient** to make a new chart, or **File to chart** to put it on one you have.
4. At the tablet, a new patient's first form makes their chart right there.



Intake results: every form that has come back, newest first.

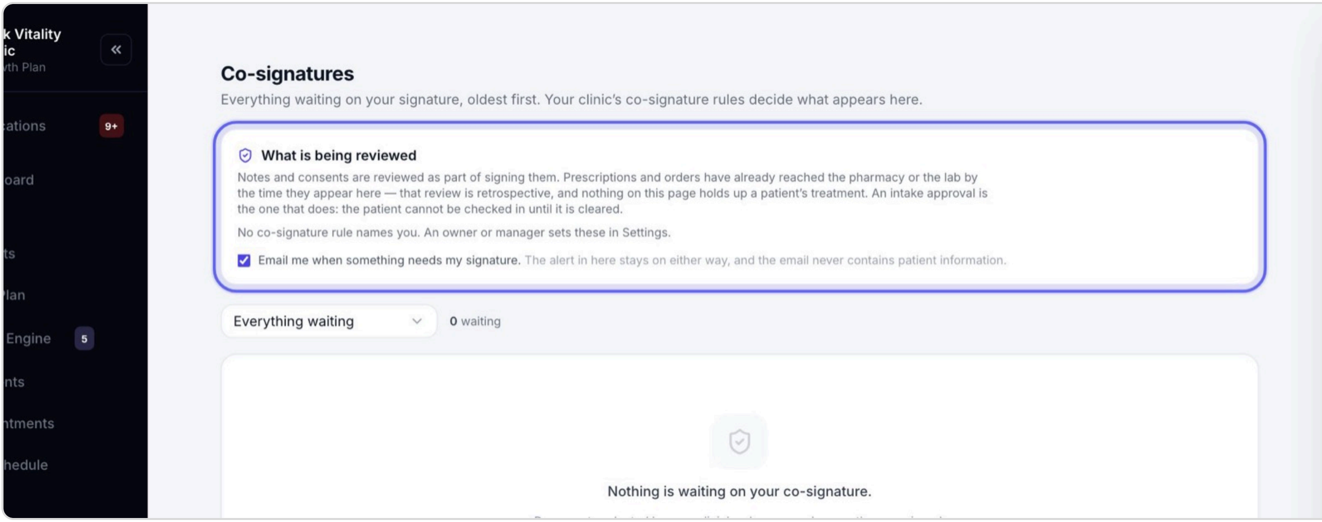
10. WHAT REACHES THE CHART

1. Answers you mapped to the chart in the form builder, like allergies or medications, go onto the patient's chart. Lists are added to, never replaced.
2. If the form needs a clinician's approval, those answers wait until a clinician clears it.
3. A consent the patient agreed to inside an intake form is recorded as signed when the form becomes a patient or is filed to a chart. For a form that arrived already on a chart, press the button that counts them, like **Record 2 consents**, in Intake results.
4. Signed consents are on the patient's chart under **Forms & Files**.

11. WHAT A CLINICIAN APPROVES

1. A form set to **Needs a clinician's approval** must be cleared before the patient can be checked in.

2. It shows up in the reviewer’s **Co-signatures**, under **Intake approvals**.
3. They press **Co-sign** and sign. Or **Decline**, with a reason.



Co-signatures: an intake approval is the one that holds up check-in.

12. CONSENTS YOUR CLINIC SIGNS TOO

1. A consent with boxes for the clinic says **Awaiting your signature** once the patient has signed.
2. On the Consents page, open the patient and press **Sign clinic fields**, or **Sign for the clinic**.
3. To have a second clinician review a signed consent, choose them under **Needs a second signature?**.

13. RENEWALS KEEP IT GOING

A consent set to renew goes back to the patient when the time is up. Their app says **Renewal due — please sign again**, and booking the visit again sends it. An intake form set to ask again does the same.

You never have to remember who is due. The paperwork comes round on its own.