Intake Engine

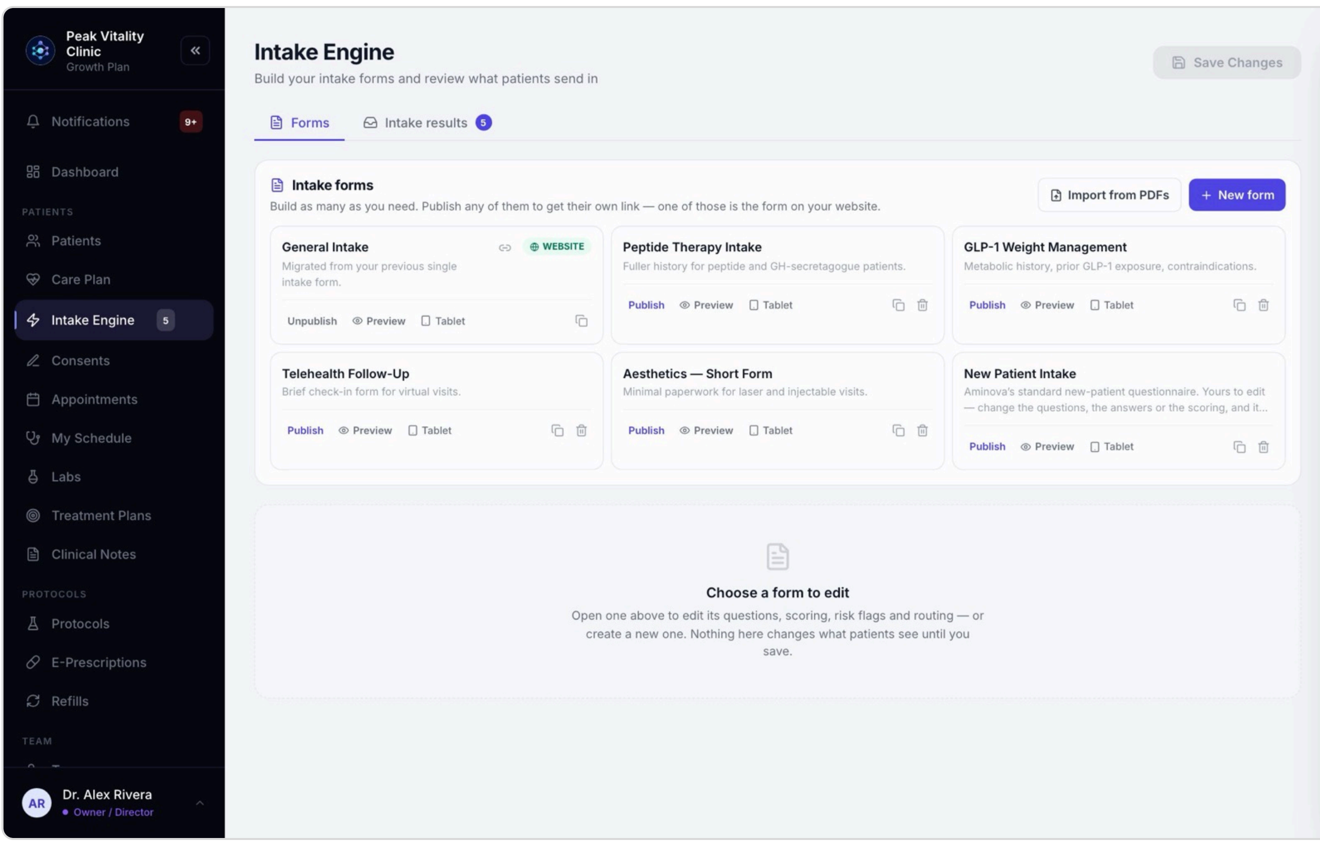
Build the forms patients fill in, choose where their answers go, and review what they send you.

Page manual · For Owners, Managers, Providers, Nurses and MAs · aminova.health/university/intake-engine

1. THE PAGE AT A GLANCE

Intake Engine has two tabs. **Forms** is your library of intake forms, and the builder for the one you open. **Intake results** is what patients have sent in.

Only an owner or manager can change a form. Everyone else can open and preview forms, but not edit them. Nurses reach Intake results from **Intake** in the sidebar.

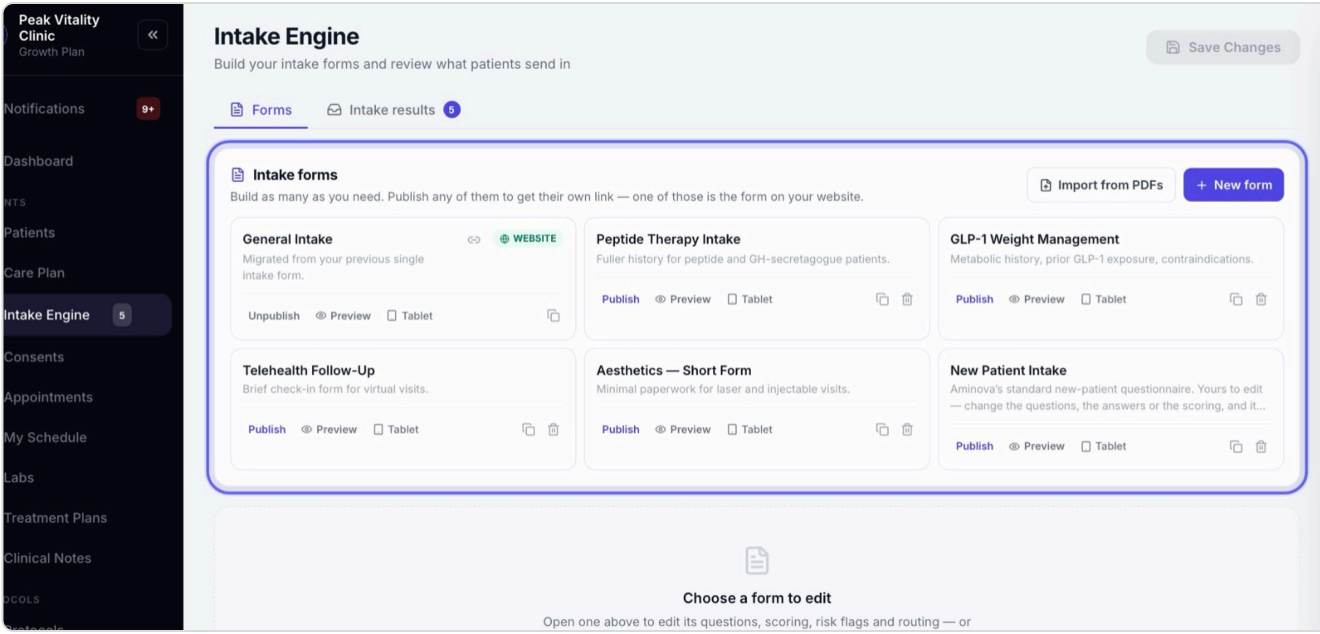


Intake Engine, on the Forms tab.

2. YOUR INTAKE FORMS

1. Every form is a card. Click its name to open it in the builder below.
2. A green **WEBSITE** tag means it is the form on your website link. **LIVE** means it has its own link. **DRAFT** means it was brought in from a PDF and isn't live yet.
3. The link icon beside a live form's name copies its link.

4. Along the bottom of each card: **Publish** or **Unpublish**, **Use on website**, **Preview** to see it as a patient does, and **Tablet** to hand it over in the office. The last two icons duplicate or delete the form.

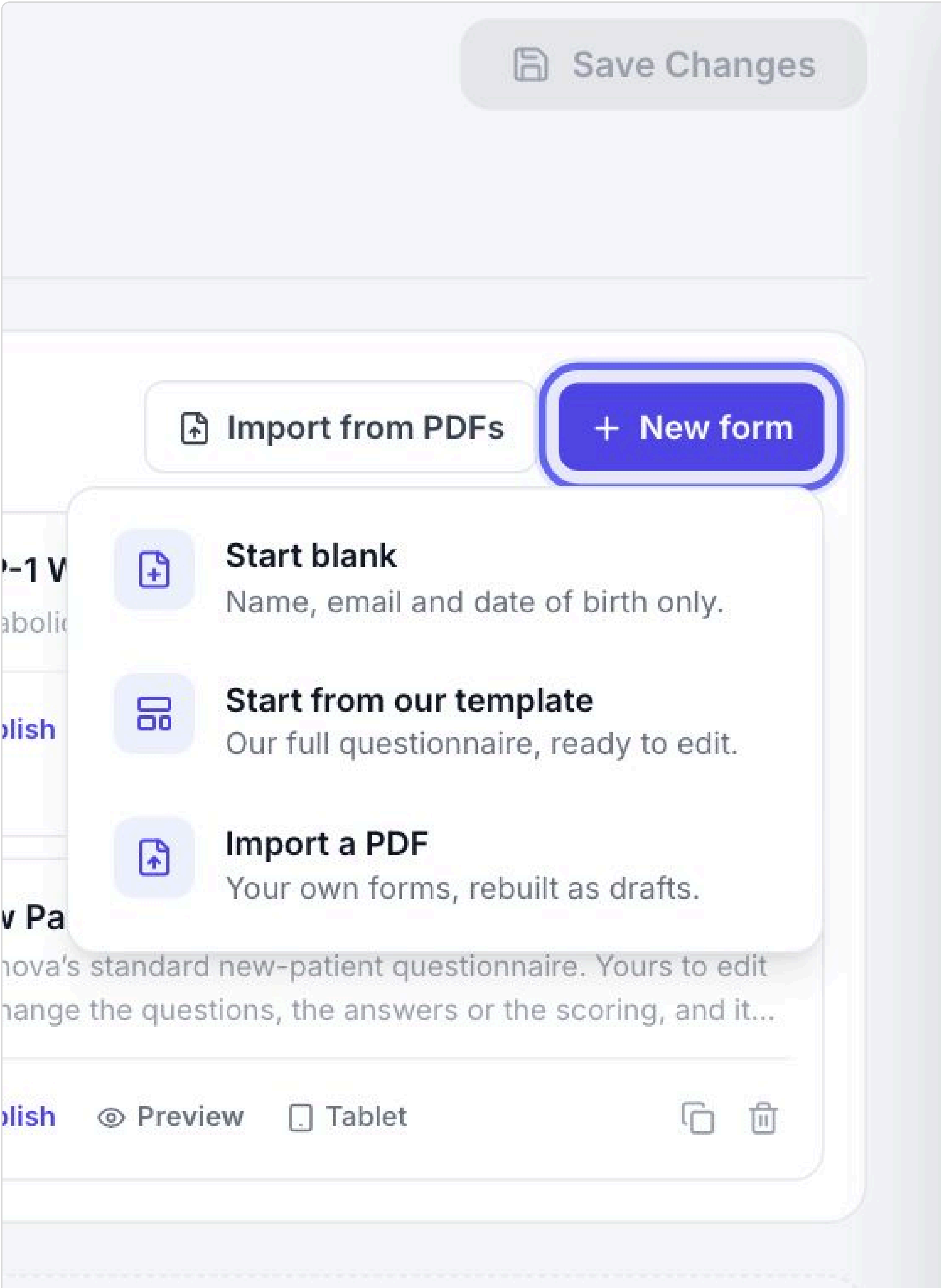


Your forms, each with its own actions.

Tip. Only a form that isn't live can be deleted. Answers already sent in on it are kept.

3. MAKE A NEW FORM

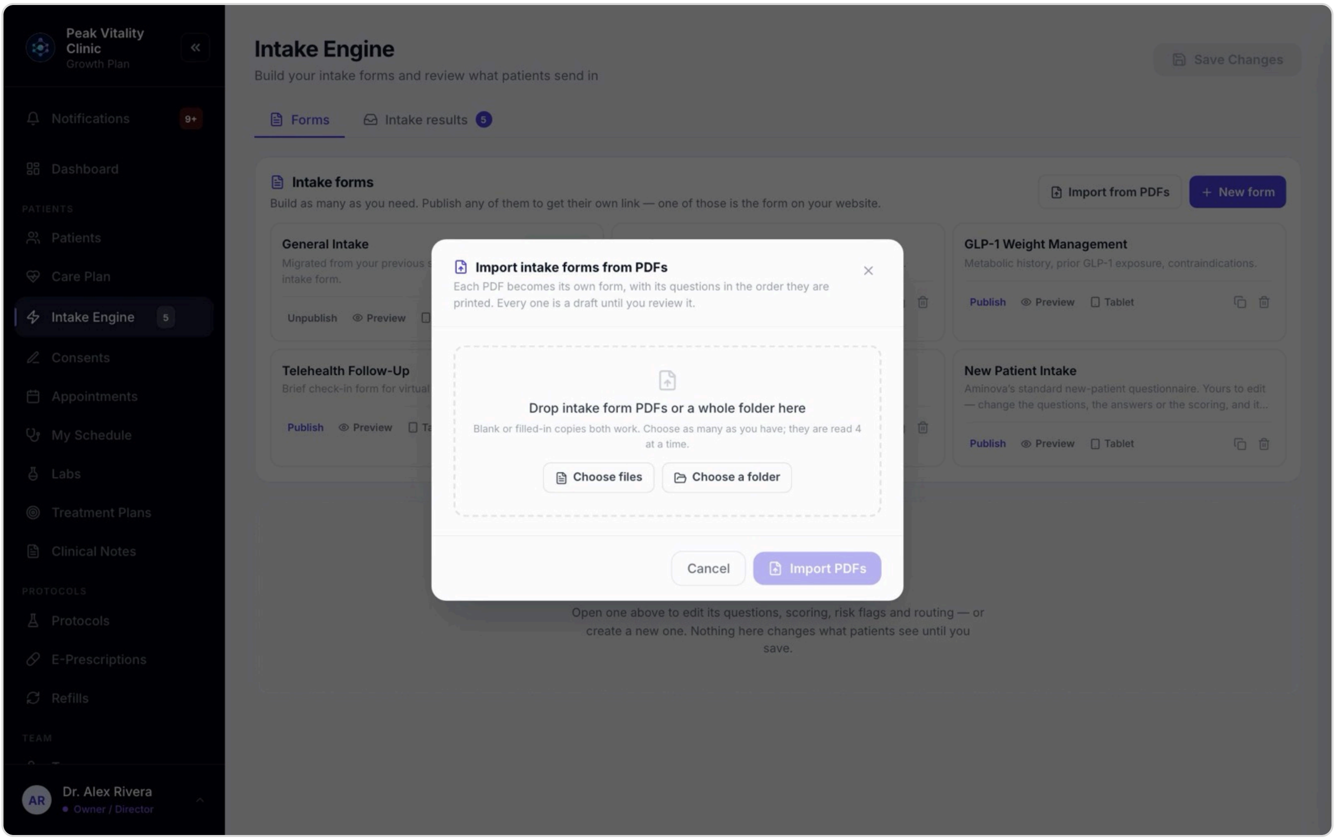
1. Click **New form**.
2. **Start blank** gives you a form with name, email and date of birth only.
3. **Start from our template** gives you a full questionnaire to cut down.
4. **Import a PDF** rebuilds your own form from a PDF.
5. The new form opens with its name ready to change. Type a name and press Enter.


Save Changes
Import from PDFs
+ New form
Start blank
Name, email and date of birth only.
Start from our template
Our full questionnaire, ready to edit.
Import a PDF
Your own forms, rebuilt as drafts.
Preview
Tablet

New form: start blank, from the template, or from your own PDF.

4. IMPORT FROM PDFS

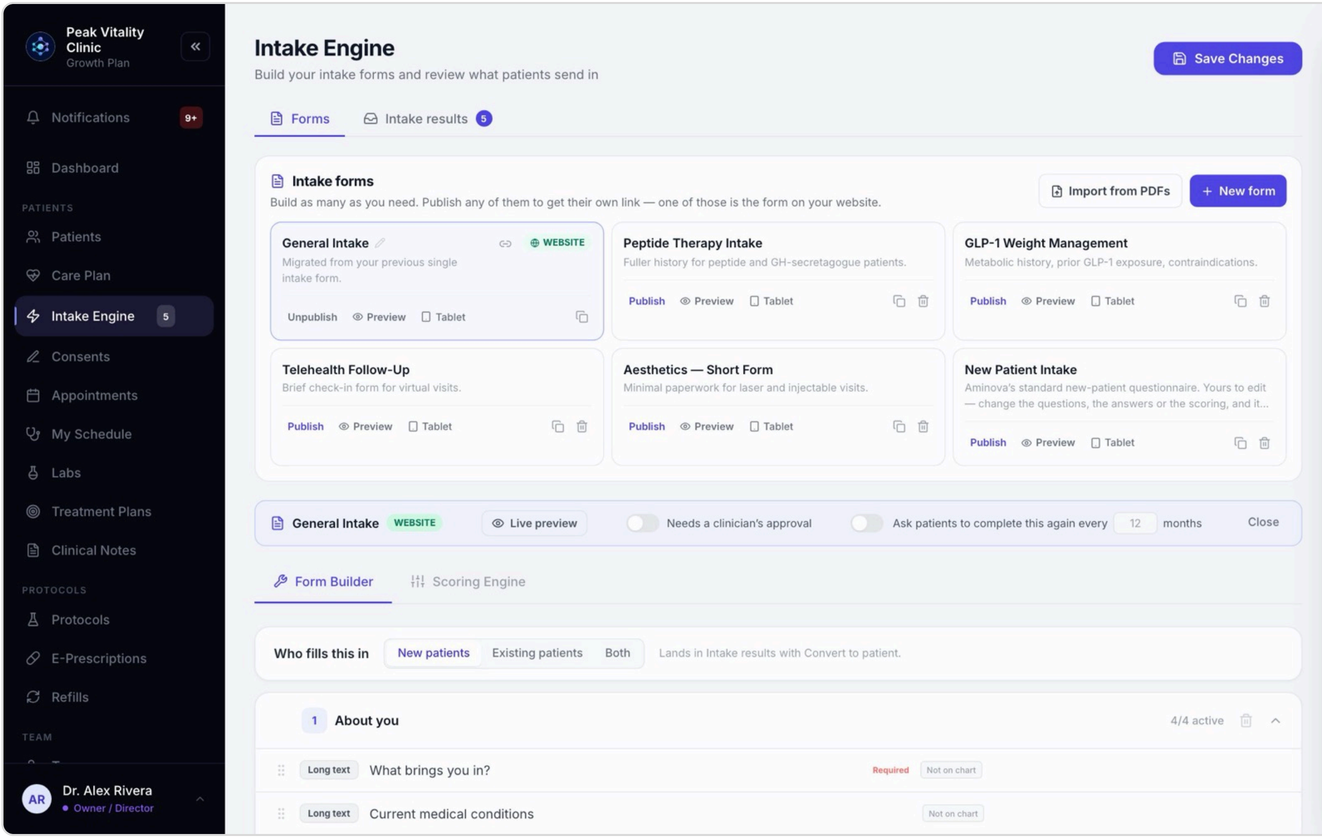
1. Click **Import from PDFs** and drop in your forms, or a whole folder.
2. Press the button that counts your files, like **Import 3 PDFs**. Each PDF becomes its own form, with its questions in the order they are printed.
3. Each one comes back as a draft. Press **Review** to open it and check every question.



Import intake forms from PDFs. Every result is a draft until you review it.

5. THE BAR ABOVE AN OPEN FORM

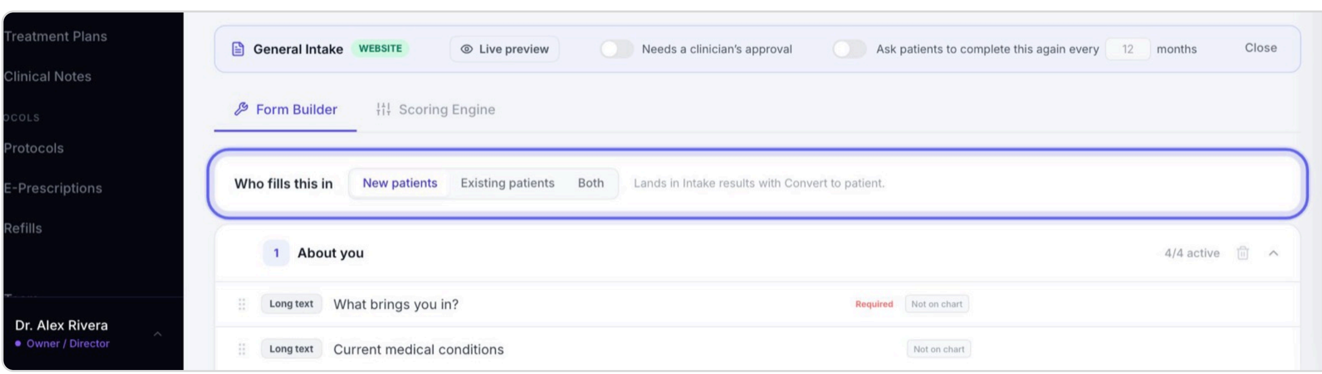
1. The form's name, and a tag that says whether it is live. A form that isn't says **NOT PUBLISHED**, with a **Publish** button right there.
2. **Live preview** shows the patient's form beside the builder. It shows what you last saved.
3. **Ask patients to complete this again every** asks patients to fill it in again after the months you set, and emails them the link.
4. **Close** puts the form away. If you have unsaved changes, it asks first.



An open form: its name, whether it is live, and its settings bar.

6. WHO FILLS THIS IN

1. **New patients**: answers land in Intake results with **Convert to Patient**.
2. **Existing patients**: it is filed to the patient's chart. There is no convert.
3. **Both**: whoever reviews each one chooses to convert it or file it.

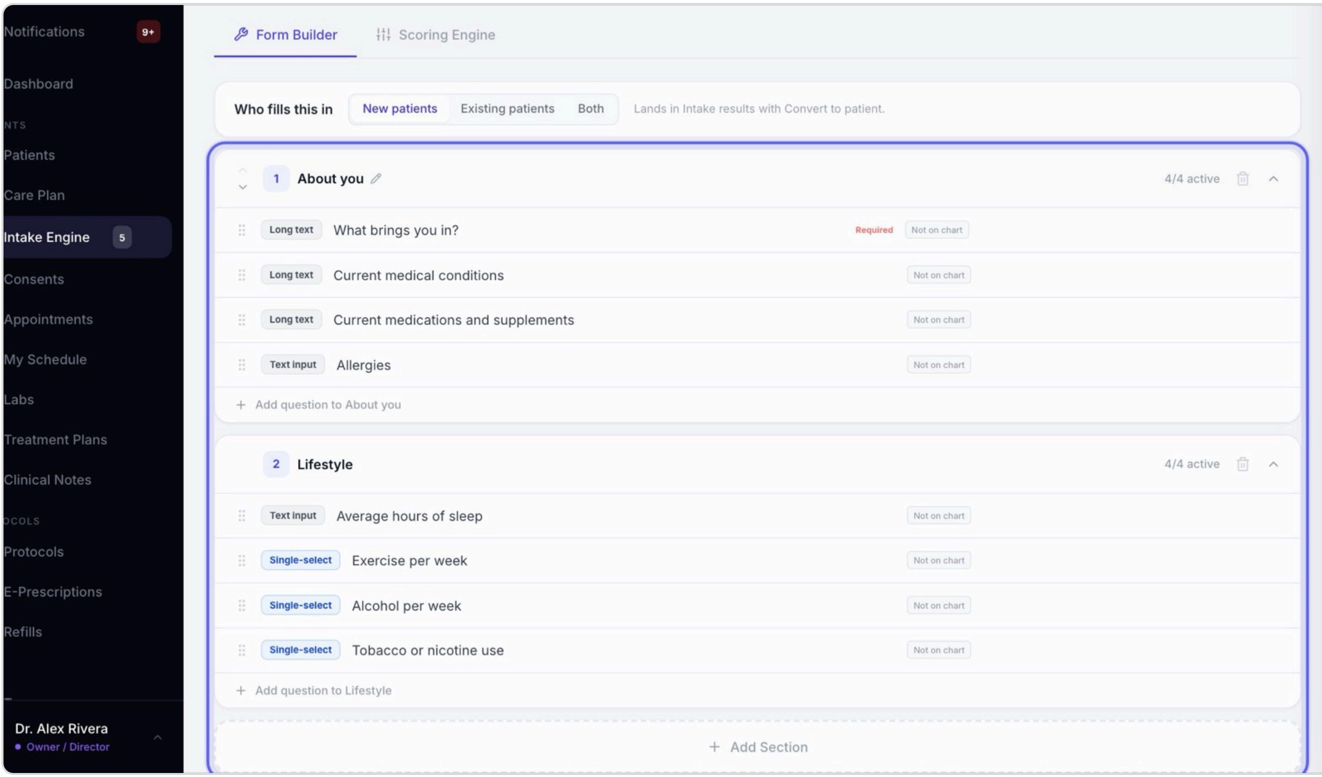


Who fills this in decides what happens to each answer set.

7. SECTIONS AND QUESTIONS

1. Click a section to open or close it. Hover its header for arrows that move it up or down. Click its name to rename it. The bin deletes it.

2. Drag a question to reorder it. Hover a question for its controls: **Move** to another section, **Edit** the wording, answer type and options, **Show if** to show it only after a certain answer, and **Required** or **Optional**.
3. The switch turns a question off without deleting it. The bin deletes it.
4. Name and email can't be deleted. The patient's record is made from them.



Each section, with its questions and their controls.

8. ADD A QUESTION OR A SECTION

1. At the bottom of a section, click its **Add question to …** line.
2. Type the **Question Text** and pick the **Question Type**, like text, a choice, a date, a file upload or a signature. Choice questions need at least two options.
3. Turn on **Required field** if it can't be skipped.
4. Optionally, pick **Save to the chart as** and **Show only if**. Press **Add Question**.
5. To add a whole section, click **Add Section** at the bottom of the form.

> **Tip.** A **Consent** question shows one of your consent forms inside the intake, and the patient agrees to it there. It lands on their chart as a signed consent when they become a patient.

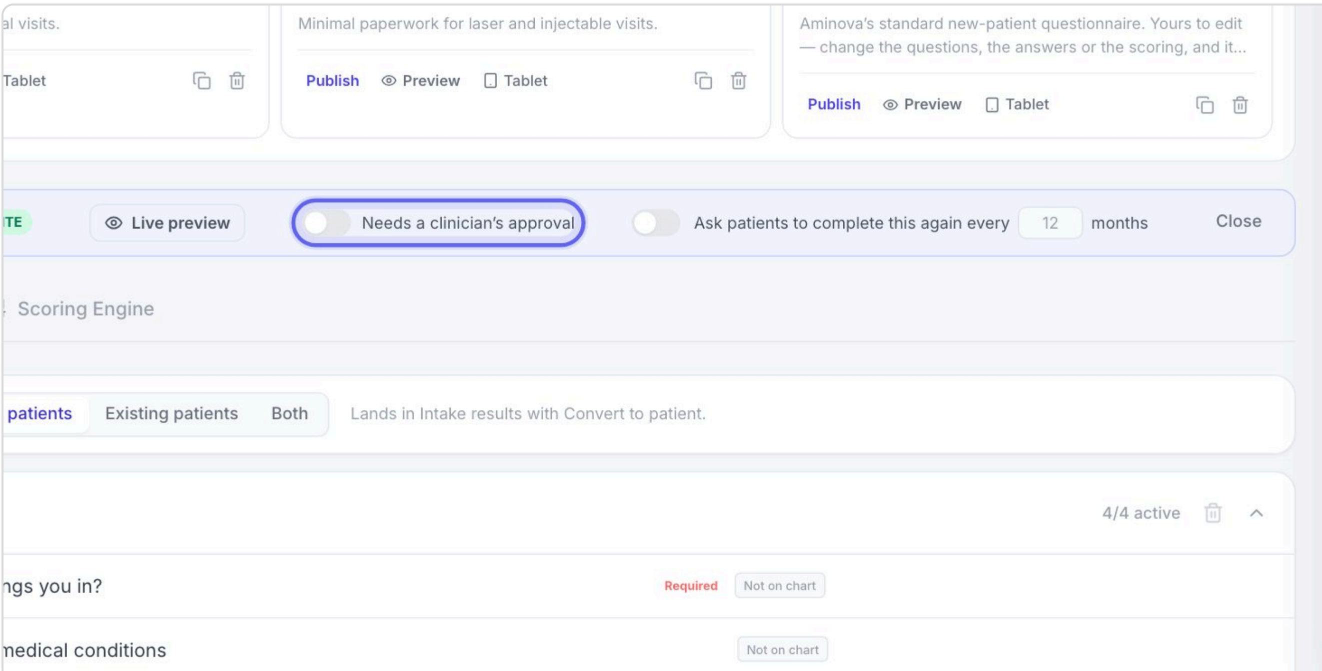
9. SEND ANSWERS TO THE CHART

1. A question you added or imported shows **Not on chart** until you map it. Hover it and click **Chart**.
2. Pick where the answer belongs on the chart, like allergies or medications.

3. It then shows where it saves. If the form needs a clinician's approval, the answer reaches the chart once a clinician clears it.

10. CLINICIAN APPROVAL

1. Turn on **Needs a clinician's approval** and every submission of this form must be cleared by a clinician. The patient can't be checked in until it is.
2. Choose who is told: **Notify all staff**, **A specific person**, or **Whoever holds a role**.
3. This switch saves the moment you flip it. You don't need to press Save.



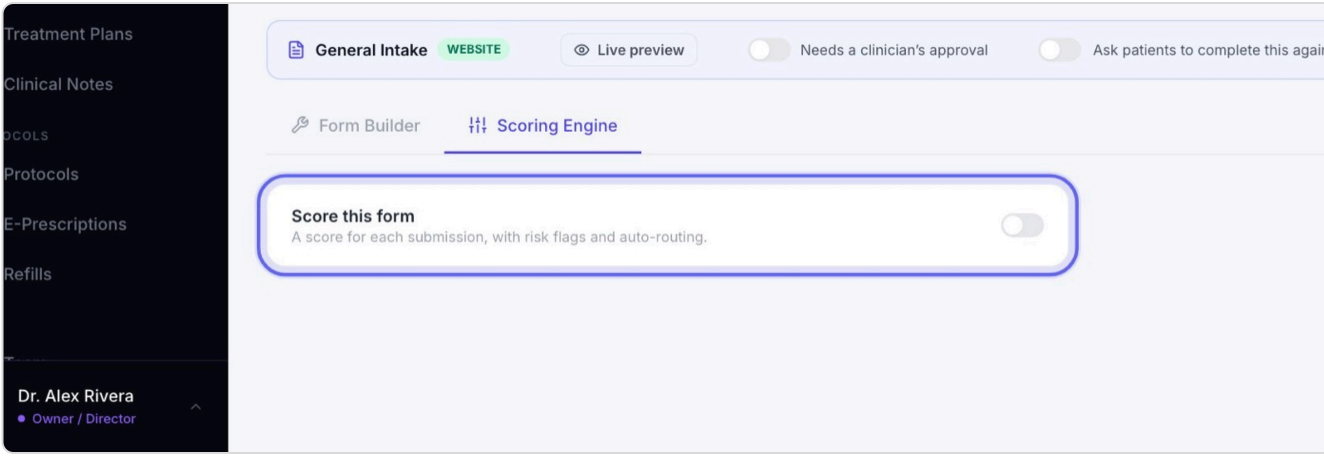
Needs a clinician's approval, in the bar above the form.

11. WHEN A SUBMISSION BECOMES A PATIENT

For a form new patients fill in, **When converted to a patient** sits under the questions. Set the **Patient status** the new chart starts with, and whether to **Send a welcome email** with their sign-in. You can also tag them from their goals or how they found you, and have a protocol suggested.

12. SCORING

1. Open the **Scoring Engine** tab and turn on **Score this form** to give each submission a score.
2. **Score** sets the points for each answer, with a simulator to test them.
3. **Risk flags** marks submissions whose answers match, like high stress.
4. **Auto-routing** moves a new submission to a stage when its rule matches. **Conversion** sets the lowest score to convert.



Score this form: off means no score, flags or routing at all.

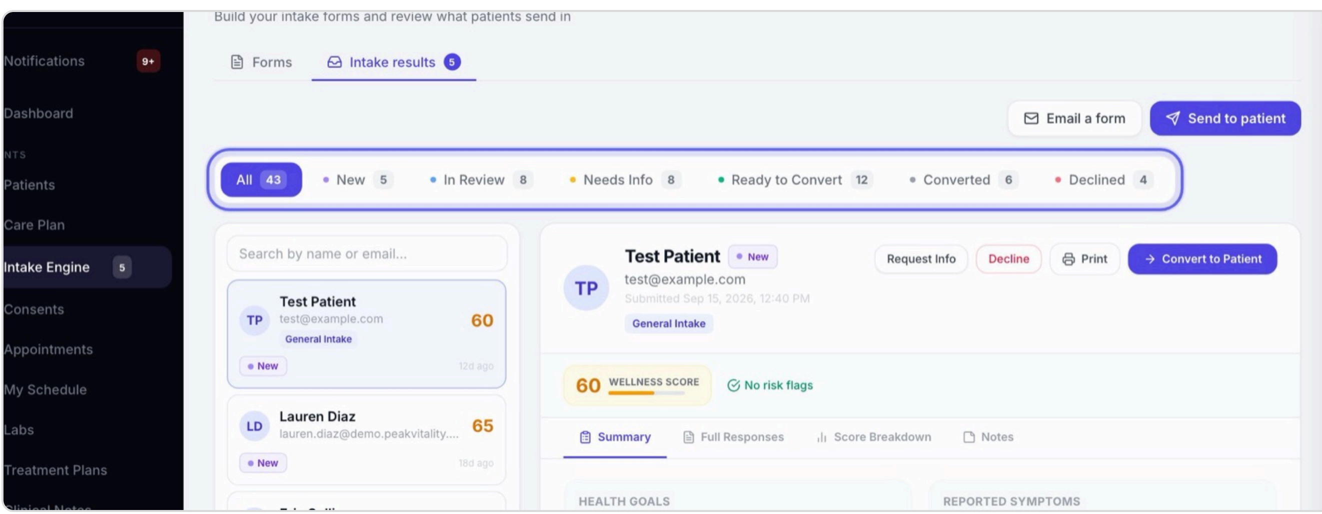
13. SAVE YOUR CHANGES

Question and scoring changes reach patients only after you press **Save Changes** at the top of the page. Until then, it says **Unsaved changes**.

If you leave without saving, the next time you open the form it offers to **Restore** what you were doing.

14. INTAKE RESULTS

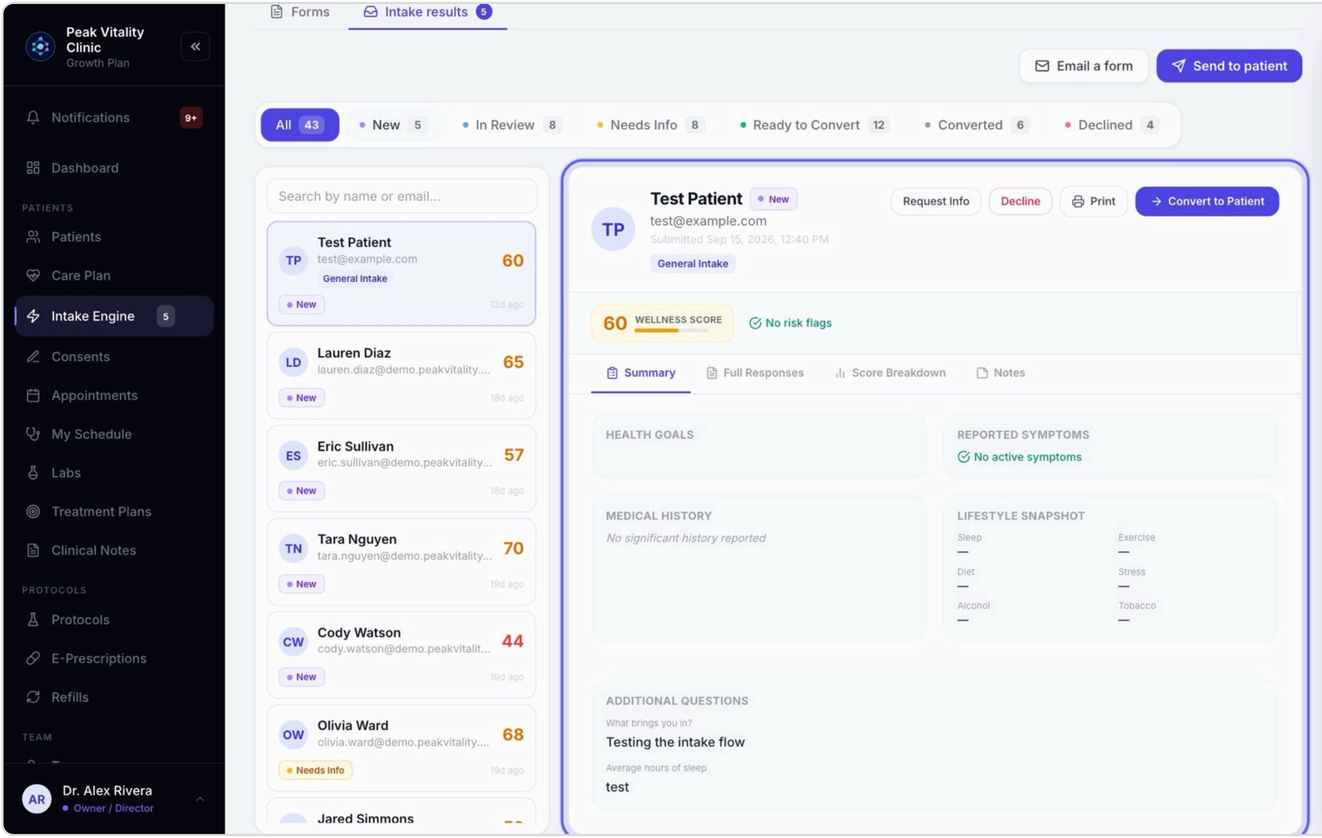
1. Open the **Intake results** tab. A number on the tab says how many are new.
2. The stages across the top are **New**, **In Review**, **Needs Info**, **Ready to Convert**, **Converted** and **Declined**. Click one to see only those.
3. Search by name or email. Each row shows the form, the score if there is one, the stage, and any risk flags.



Intake results, by stage.

15. READ A SUBMISSION

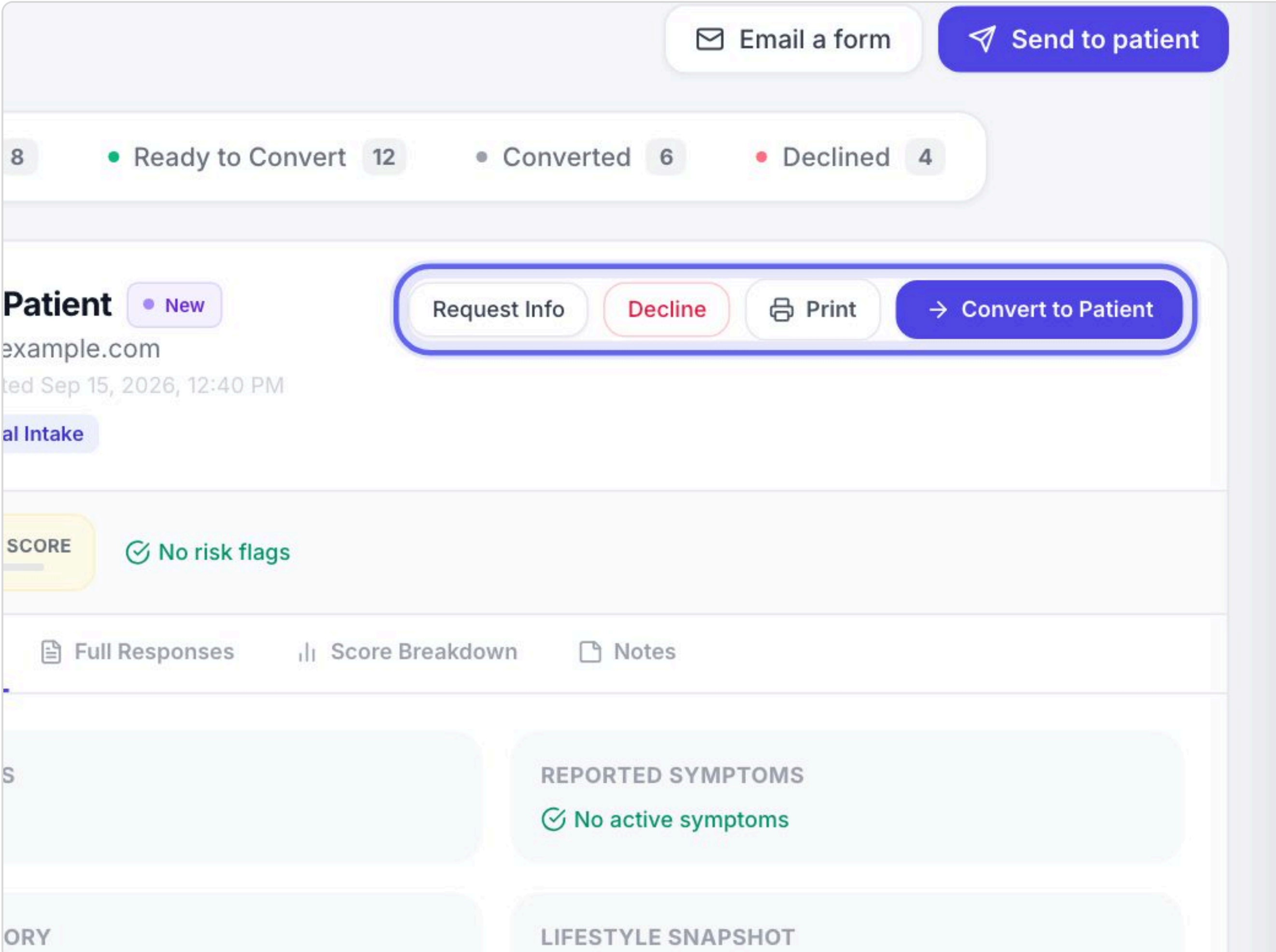
Click one to read it. **Summary** gives the key answers, **Full Responses** gives every answer, and **Notes** holds notes only your team can see. A scored form also has **Score Breakdown**.



One submission: the answers, the score and any flags.

16. ACT ON A SUBMISSION

1. **Convert to Patient** makes a new chart from it. **File to chart** puts it on a patient you already have. Which you see depends on who the form is for.
2. **Request Info** moves it to Needs Info, so your team knows to follow up.
3. **Decline** asks for a reason, and records it.
4. **Print** prints it or saves it as a PDF.
5. To send a form, use **Email a form** for anyone, even someone with no chart, or **Send to patient** for their patient app.



Convert, file to a chart, ask for more, or decline.