

Bring in your intake forms

Upload the PDFs you use today and check each one, or start from our template. Then publish them and attach them to your visit types.

Setup guide · For Owners, Managers · aminova.health/university/intake-forms

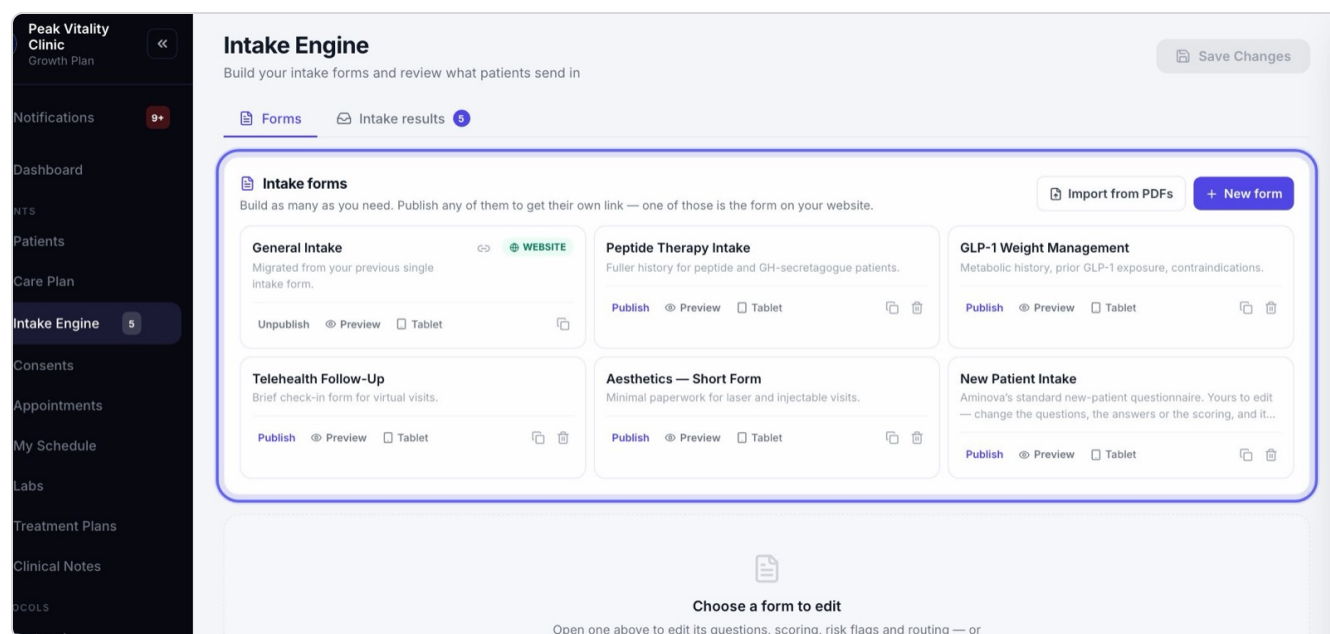
1. WHAT YOU'LL SET UP

An intake form is the questionnaire a patient fills in before a visit: who they are, their health history, their goals. You can have as many as you like, like a long one for new patients and a short one for a single treatment.

When you're done, each form is live, and the right ones go out on their own when a visit is booked.

2. OPEN THE INTAKE ENGINE

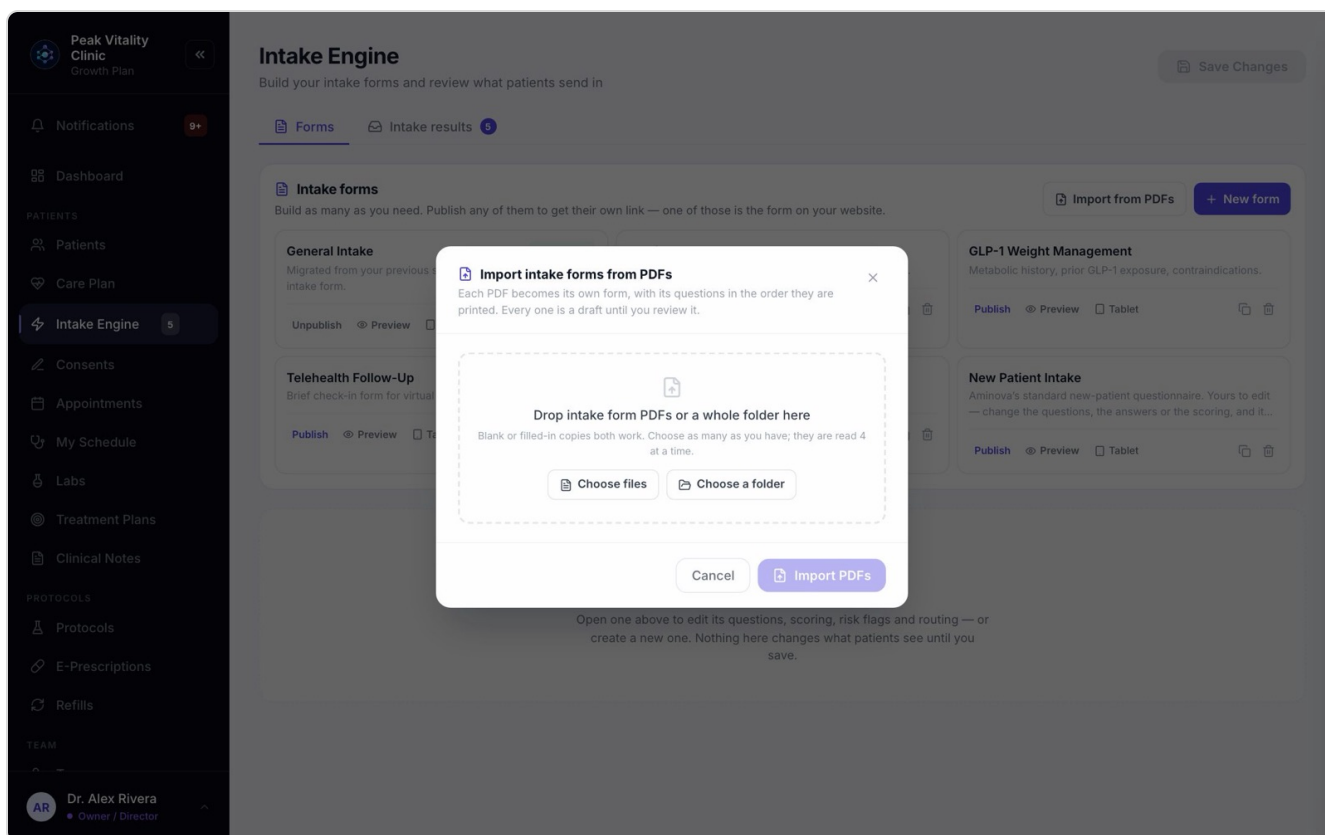
1. Go to **Intake Engine** in the sidebar.
2. Stay on the **Forms** tab. Your forms are listed at the top.



Intake Engine → Forms lists every intake form you have.

3. UPLOAD YOUR PDFS

1. Click **Import from PDFs**.
2. Drop in your forms, or a whole folder. Blank or filled-in copies both work.
3. Press the button that counts your files, like **Import 3 PDFs**. Keep the window open while it reads them.
4. Each PDF becomes its own form, with its questions in the order they are printed. Anything worth a look is listed under it.



Import intake forms from PDFs: drop them in, and each comes back as a draft.

Tip. Nothing reaches a patient yet. Each form is saved as a draft, switched off and not on any link.

4. CHECK EACH DRAFT

1. Press **Review** beside a form, or click its card in the list. It has a **DRAFT** tag.
2. Read every question. Hover one and click **Edit** to fix its wording, its answer type or its choices.
3. A question marked **No answer options — patients get a text box** needs its choices added in **Edit**.
4. Use **Move** to put a question in another section, and the arrows on a section to reorder the form.
5. Switch off or delete anything you don't need.

The screenshot shows the 'Form Builder' interface. On the left is a dark sidebar with navigation links: Notifications (9+), Dashboard, INTS, Patients, Care Plan, Intake Engine (5), Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes, SCOLS, Protocols, E-Prescriptions, and Refills. At the bottom of the sidebar is 'Dr. Alex Rivera' with the role 'Owner / Director'. The main area has tabs for 'Form Builder' and 'Scoring Engine'. Below the tabs is a header 'Who fills this in' with buttons for 'New patients', 'Existing patients', and 'Both', followed by the text 'Lands in Intake results with Convert to patient.' The form itself consists of two sections. Section 1, 'About you', has a '4/4 active' status and contains four questions: 'What brings you in?' (Long text, Required, Not on chart), 'Current medical conditions' (Long text, Not on chart), 'Current medications and supplements' (Long text, Not on chart), and 'Allergies' (Text input, Not on chart). Section 2, 'Lifestyle', also has a '4/4 active' status and contains four questions: 'Average hours of sleep' (Text input, Not on chart), 'Exercise per week' (Single-select, Not on chart), 'Alcohol per week' (Single-select, Not on chart), and 'Tobacco or nicotine use' (Single-select, Not on chart). Both sections have an 'Add question to ...' button at the bottom. A dashed line separates the two sections, and there is an 'Add Section' button at the very bottom.

A form opened in the builder. Hover a question for its controls.

5. OR START FROM A TEMPLATE

1. Click **New form**.
2. Choose **Start from our template** for a full questionnaire you cut down, or **Start blank** for just name, email and date of birth.
3. The name is ready to change. Type yours and press Enter.
4. Add sections with **Add Section**, and questions with each section's **Add question to ...** line.

 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

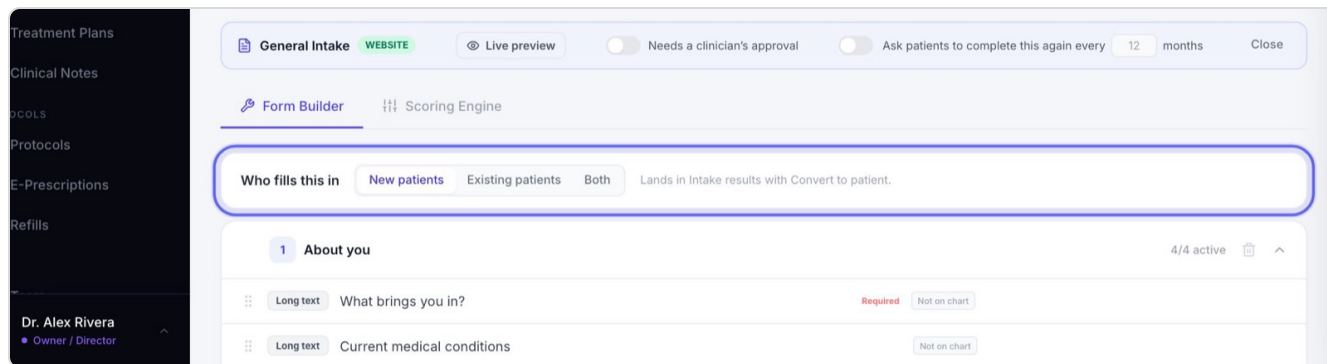
 Tablet



New form: start blank, from our template, or from a PDF.

6. CHOOSE WHO FILLS IT IN

1. At the top of the builder, find **Who fills this in**.
2. Pick **New patients** for a form that makes a new chart, **Existing patients** for one that goes on a chart you already have, or **Both**.

The screenshot shows the 'Form Builder' interface. On the left is a dark sidebar with navigation links: 'Treatment Plans', 'Clinical Notes', 'SCOLS', 'Protocols', 'E-Prescriptions', 'Refills', and a user profile for 'Dr. Alex Rivera' (Owner / Director). The main area has a top bar with 'General Intake' (highlighted in green), 'WEBSITE', 'Live preview', 'Needs a clinician's approval' (toggle off), 'Ask patients to complete this again every 12 months' (toggle off), and a 'Close' button. Below this is a 'Form Builder' tab and a 'Scoring Engine' icon. The 'Who fills this in' section is highlighted with a blue border and contains three tabs: 'New patients' (selected), 'Existing patients', and 'Both'. A tooltip for 'New patients' says 'Lands in Intake results with Convert to patient.' Below this is a section titled '1 About you' with '4/4 active' items. It contains two 'Long text' questions: 'What brings you in?' (marked 'Required' and 'Not on chart') and 'Current medical conditions' (marked 'Not on chart').

Who fills this in decides whether a submission is converted or filed to a chart.

7. SEND ANSWERS TO THE CHART

1. A question that shows **Not on chart** keeps its answer with the form only.
2. Hover it and click **Chart**, then pick where it belongs, like allergies or medications.
3. Do this for every answer your providers need on the chart.

8. DECIDE IF A CLINICIAN APPROVES IT

1. If a clinician must review each submission before treatment, turn on **Needs a clinician's approval**.
2. Choose who is told: **Notify all staff**, **A specific person**, or **Whoever holds a role**.
3. This saves as soon as you flip it.

al visits.

Minimal paperwork for laser and injectable visits.

Aminova's standard new-patient questionnaire. Yours to edit — change the questions, the answers or the scoring, and it...

Tablet

Publish Preview Tablet

TE Live preview **Needs a clinician's approval** Ask patients to complete this again every 12 months Close

Scoring Engine

patients Existing patients Both Lands in Intake results with Convert to patient.

4/4 active

ngs you in? Required Not on chart

medical conditions Not on chart

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

9. SAVE AND PREVIEW

1. Press **Save Changes** at the top of the page. Your changes reach patients only after you save.
2. Click **Live preview** to see the form beside the builder, or **Preview** on its card to open it the way a patient does.

10. PUBLISH IT

1. Press **Publish** on the form's card, or beside **NOT PUBLISHED** above the builder.
2. It now says **LIVE** and has its own link. Click the link icon beside its name to copy it.
3. For the form on your website, press **Use on website** on its card. It gets the **WEBSITE** tag.

Tip. A draft from your PDFs can't be sent to patients until you publish it.

11. ATTACH IT TO YOUR VISIT TYPES

1. Go to **Appointments** → **Visit types** and press **Edit** on a visit.
2. Open **Forms & consents** and click **Add an intake form**.
3. Choose **Once**, so a patient who already filled it in isn't asked again, or **Every visit** for a check-in form.
4. Press **Save changes**. From now on the form goes out on its own when this visit is booked.

Peak Vitality Clinic
Growth Plan

Appointments

New patient consult
Everything about this visit lives here — booking, rooms, forms and checkout all follow it.

- Basics**
Name, category, description
- Format & length**
How long, where, who can book
- Providers**
Who sees this visit
- Rooms & timing**
Rooms, setup and cleanup
- Services & pricing**
Price, deposit, what it sells
- Forms & consents**
Sent automatically on booking
- Patient prep**
Checklist and care programs
- Review**
Everything, and any conflicts

Intake forms
Sent to the patient automatically when this visit is booked. Once means a patient who already filled it in isn't asked again.

No intake forms go out with this visit.

+ Add an intake form

Consent forms
Sent when it's booked. Nobody is asked to sign something they've already signed; a consent with a renewal window comes round again on its own.

No consents go out with this visit.

+ Add a consent

Delete Back Next Save changes

Forms & consents on a visit type, before anything is attached — press Add an intake form to start.

12. ASK AGAIN EVERY YEAR, IF YOU NEED TO

Some forms need filling in again, like a yearly health history. Open the form and turn on **Ask patients to complete this again every**, then set the months. Patients whose answers are older than that are asked again and emailed the link.

That's it. Your intake forms are ready.