# 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

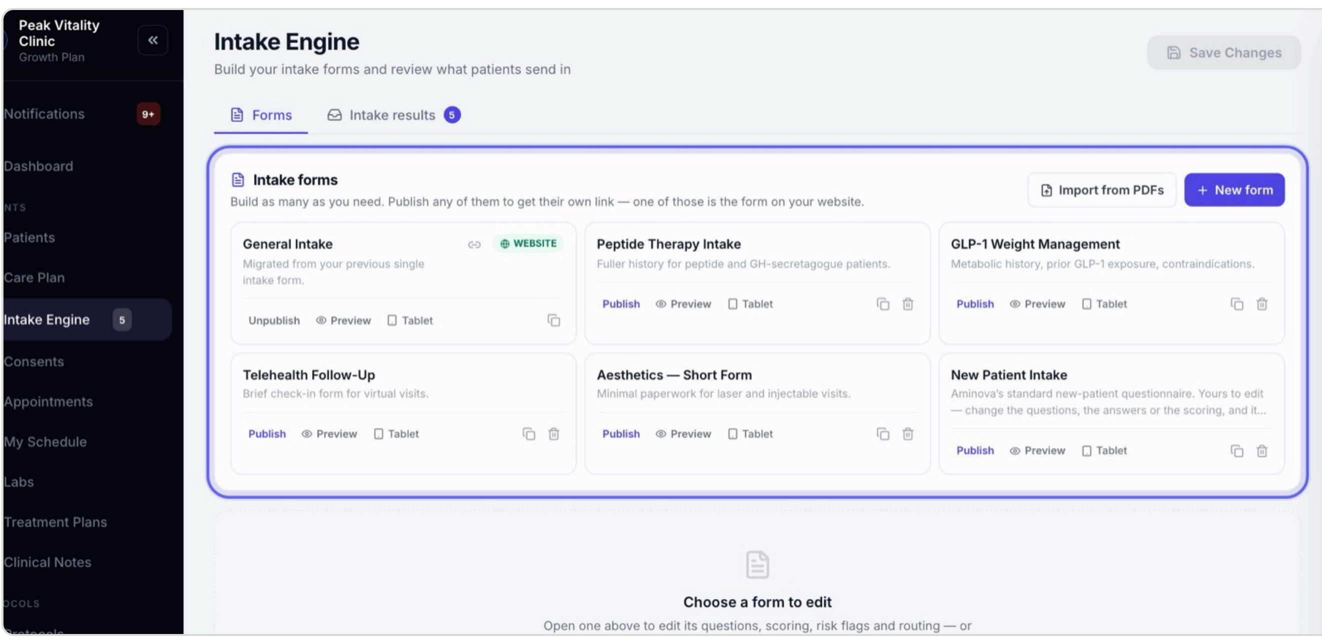
## 1. WHAT YOU'LL SET UP

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

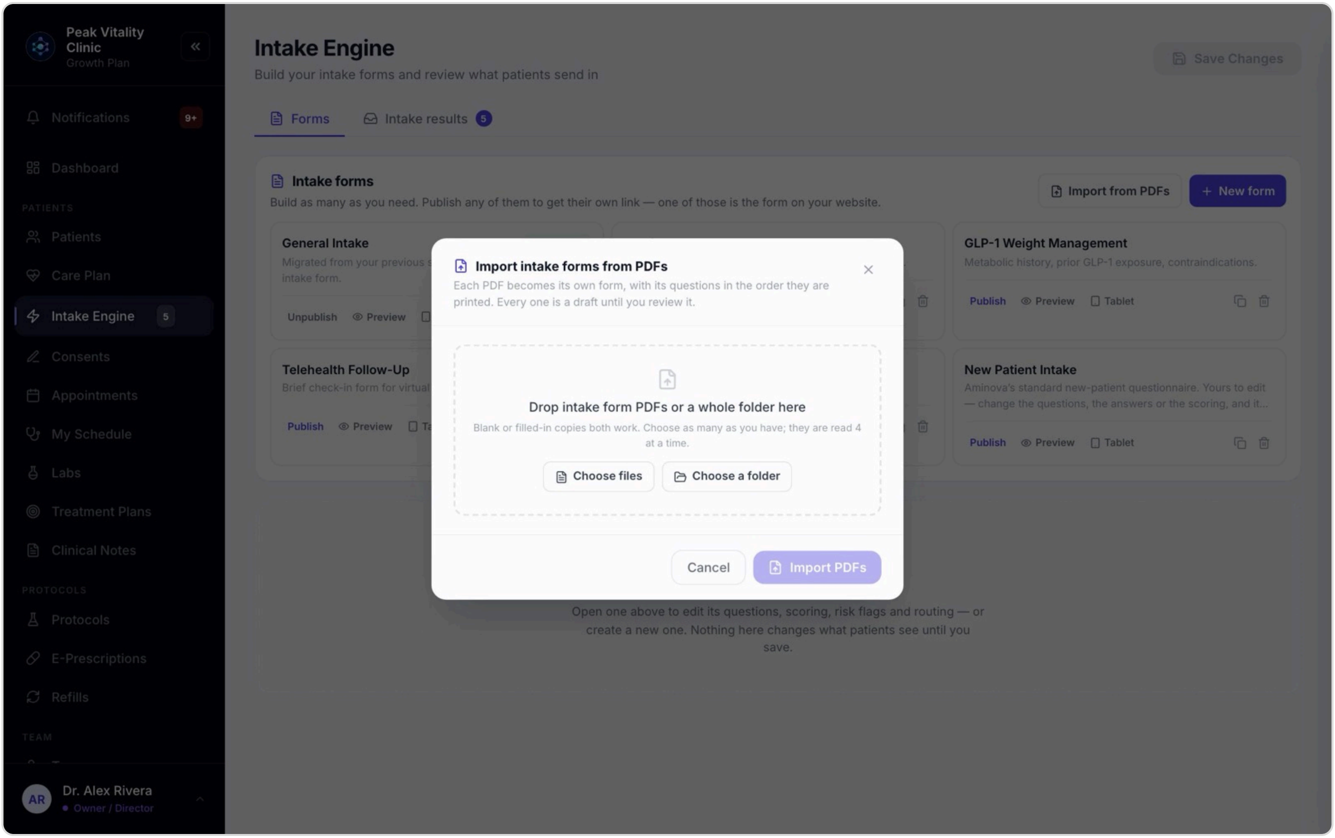
1. Go to **Intake Engine** in the sidebar.
2. Stay on the **Forms** tab. Your forms are listed at the top.




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.

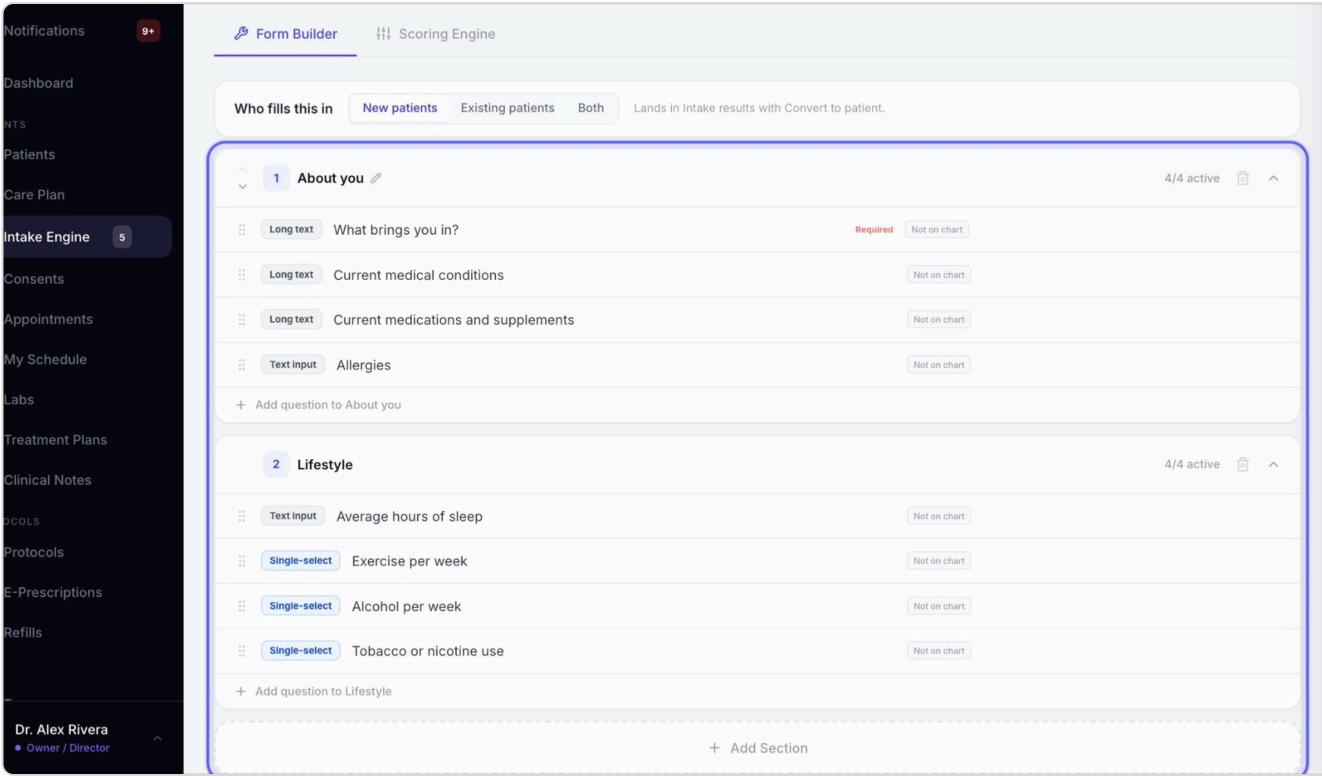



Import intake forms from PDFs: drop them in, and each comes back as a draft.

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

## 4. CHECK EACH DRAFT

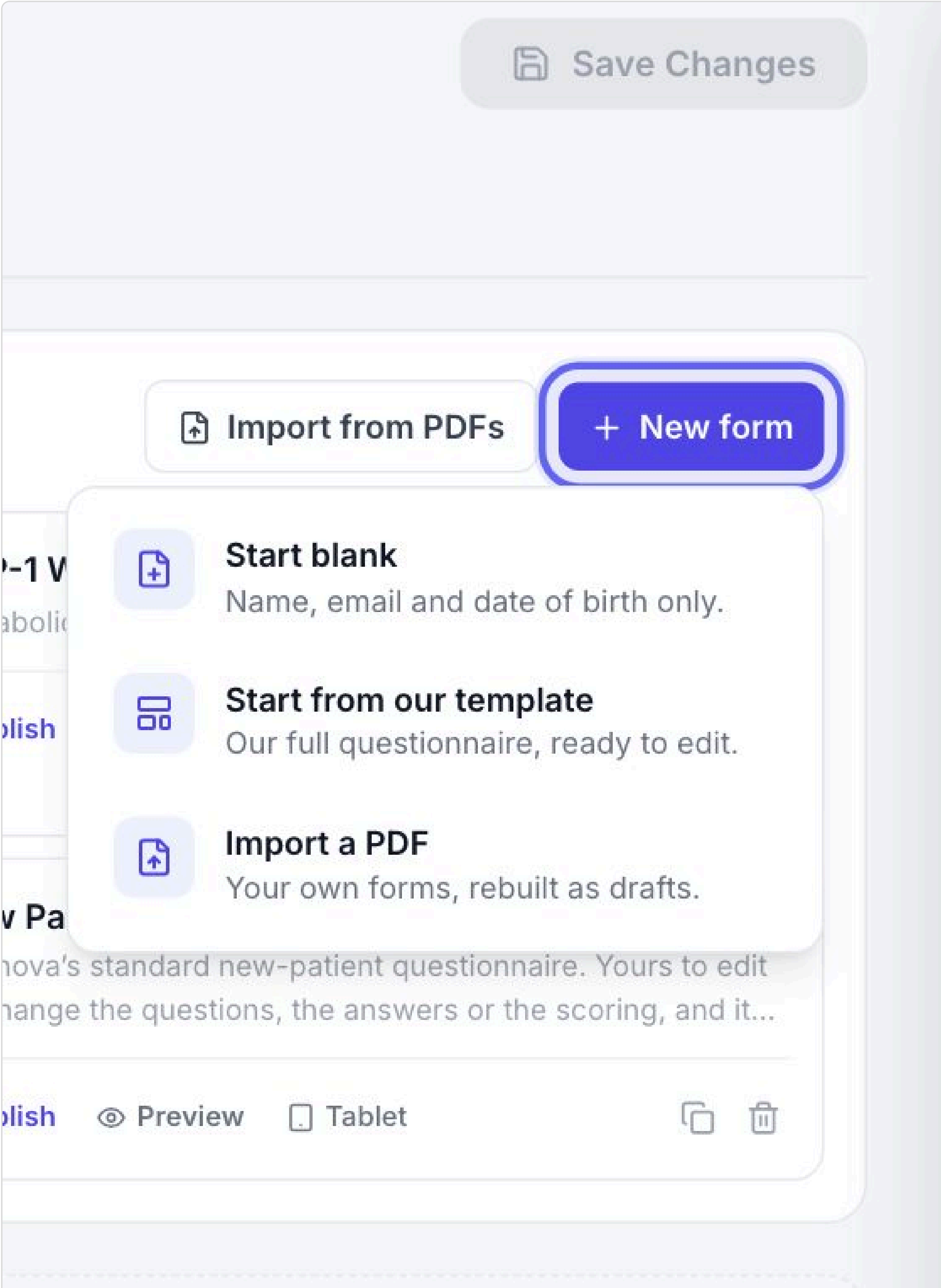
1. Press **Review** beside a form, or click its card in the list. It has a **DRAFT** tag.
2. Read every question. Hover one and click **Edit** to fix its wording, its answer type or its choices.
3. A question marked **No answer options — patients get a text box** needs its choices added in **Edit**.
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.




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

## 5. OR START FROM A TEMPLATE

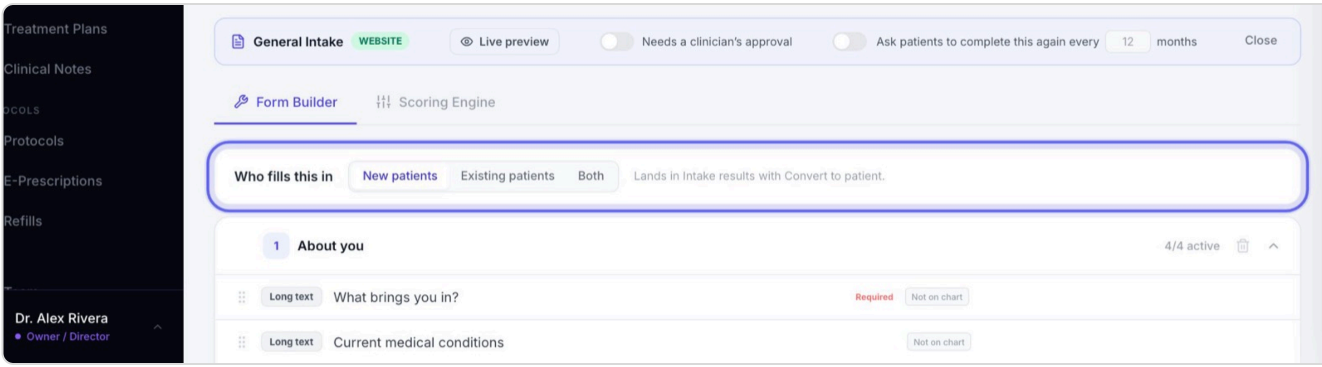
1. Click **New form**.
2. Choose **Start from our template** for a full questionnaire you cut down, or **Start blank** for just name, email and date of birth.
3. The name is ready to change. Type yours and press Enter.
4. Add sections with **Add Section**, and questions with each section's **Add question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



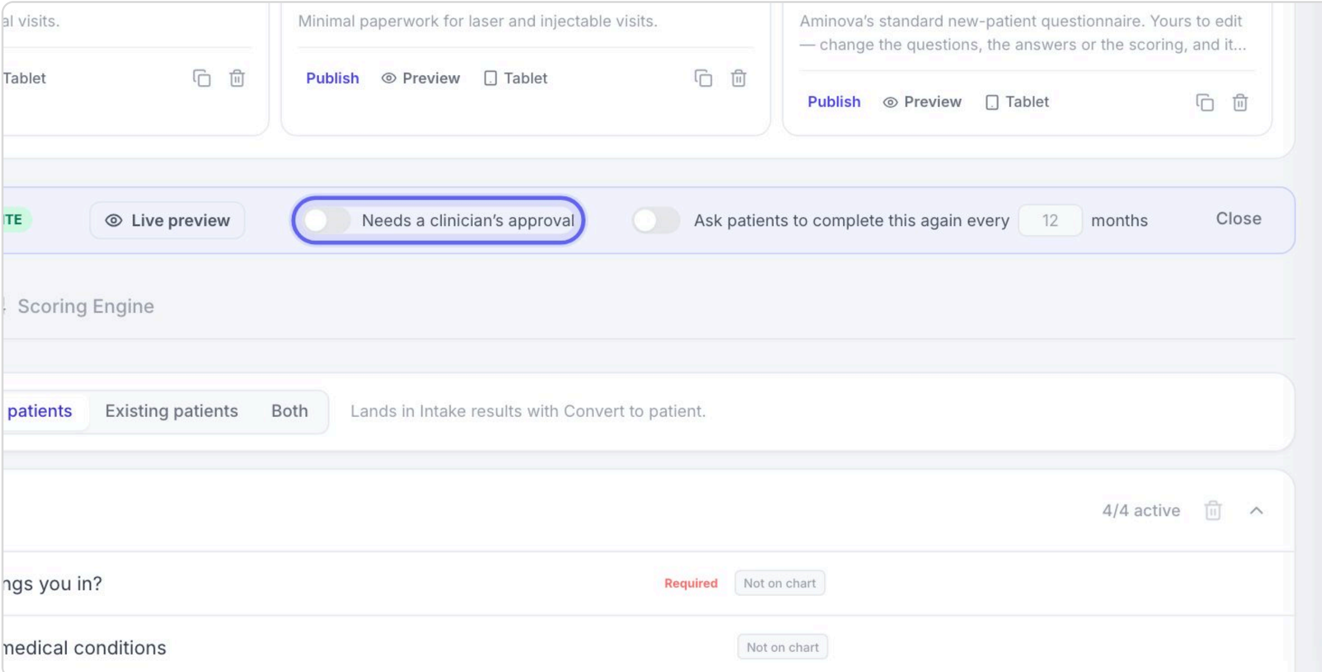

Who fills this in decides whether a submission is converted or filed to a chart.

## 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.



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.

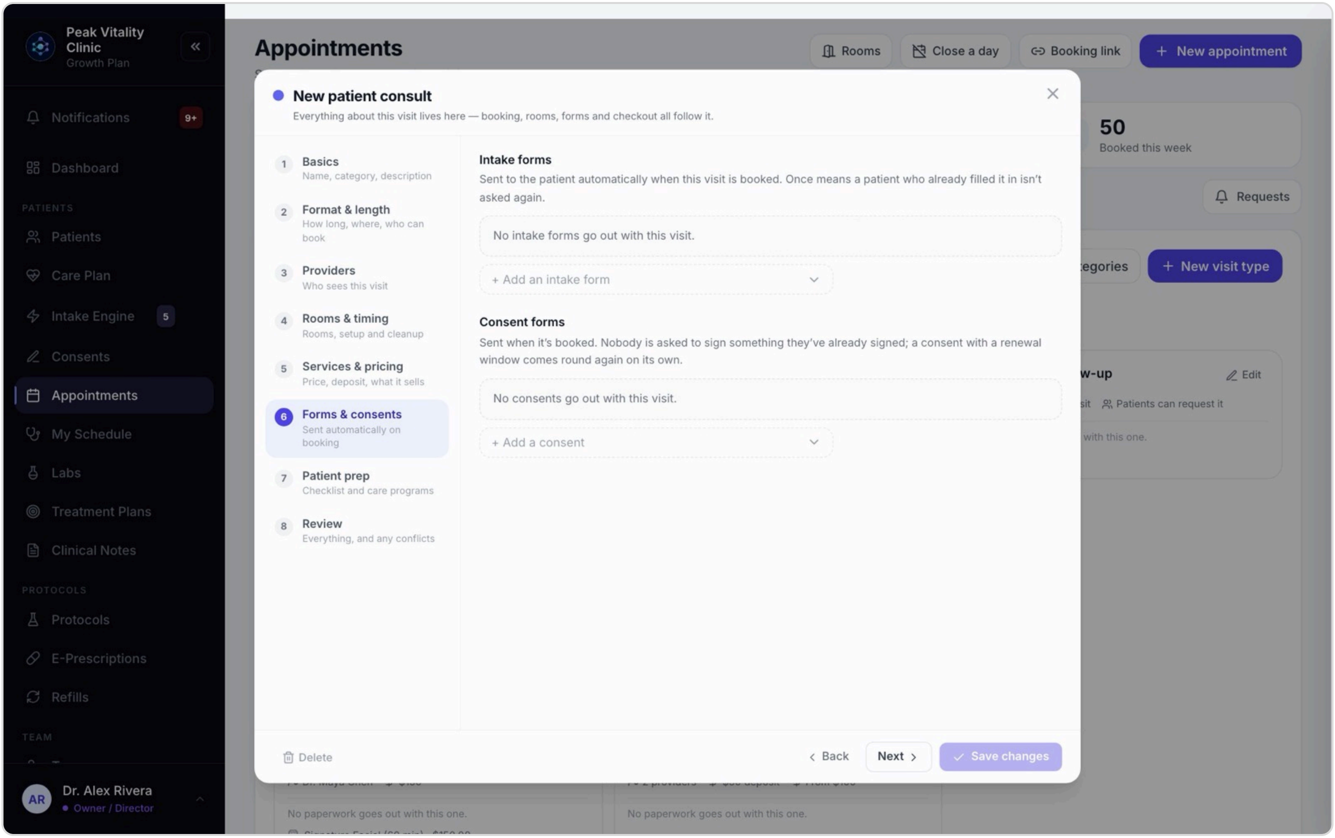
## 10. PUBLISH IT

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.




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.