

Send Forms to the Portal

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About

Forms can be configured to be started by clients on the Client Portal. The Primary Clinician listed on the Face Sheet for that client will receive a reminder on their Reminders List under Started Forms. If a client has a portal account, clinical users can also start and send Forms to the portal to be completed by the client. If a clinician pushes a specific Form to the portal, when it is completed by the client it will show up on that clinician's Reminders List.

Clients can access Forms on the portal by clicking on the **Documents** button within the Navigation menu. When the client edits or completes the form, the changes will appear in the client record. It is important to note, portal users do not get notifications if there is a task for them to complete on the portal. Your Agency has to notify the client that there are Forms to complete.

Set Up an Existing Form to be Started on Portal

1. Navigate to Form Setup: **Main Menu > Admin Tools Menu > Form Builder.**
2. Select an existing form from the drop-down.
3. Click the **Edit This Form** button.
4. Check the **Client Portal Accessible** box. If checked, this Form will be able to be started by clients in the Client Portal.
5. Click the **Update** button to save your changes.

Set Up a New Form to be Started on Portal

1. Navigate to Form Setup: **Main Menu > Admin Tools Menu > Form Builder.**
2. Select **Add New Form** button.
3. Fill in the appropriate fields for the Form.
4. Check the **Client Portal Accessible** box. If checked, this Form will be able to be started by clients in the Client Portal.
5. Click the **Add** button.

Send Form to Portal to be Completed and/or Signed

From Admissions/Clinical Forms:

1. Navigate to the form that will be sent to the portal: **Main Menu > Admissions or Clinical Forms Menu > select form type > select radio button of form.**
2. Click the **Open Form** button.
3. Fill in the appropriate fields for the Form.
4. Choose one of the two following options to send the form to the portal:
 - **Save and Send to Patient Portal:** In the Send Form to Patient Portal window, select a client login from the drop-down and click **OK**.

Notes:



- If the clinician saves and sends a form to the portal, the client can edit the form and sign it.
- If you incorrectly chose to send to the portal but did not mean to you can click the **Remove from Patient Portal** button.

- **E-Signature/Seal:**

- a. In the E-Signature/Seal window, complete the appropriate fields and sign the form by entering your password or selecting **Use E-Signatures**.

- b. Click **Submit**. A window is displayed that the Form has been successfully Signed, Updated, and Sealed.
- c. Click **Send to Patient Portal**.
- d. Select a client login from the drop-down and click **OK**.



Note: If you sign and seal the Form before sending it to the portal, the client will only be able to sign the Form.

From the Document Center

1. Navigate to Document Center: **Main Menu > Reports Menu > Document Center**
2. Search for the client.
3. Choose the radio button for the appropriate **Case #**.
4. Click the **Open Case** button.
5. Choose the appropriate form by selecting the corresponding radio button.
6. Click the **Open Form** button.
7. Choose one of the two following options to send the form to the portal:

- **Save and Send to Patient Portal:** In the Send Form to Patient Portal window, select a client login from the drop-down and click **OK**.



Notes:

- If you save and send a Form to the portal, the client can edit the Form and sign it.
- If you incorrectly chose to send to the portal but did not mean to you can click the **Remove from Patient Portal** button.

- **E-Signature:**

- a. In the E-Signature window, sign the form by entering your password or selecting **Use E-Signatures**.
- b. Click **Submit**. A window is displayed, the Form has been successfully Signed.
- c. Click **Send to Patient Portal**.
- d. Select a client login from the drop-down and click **OK**.



Note: If you sign and seal the Form before sending it to the portal, the client will only be able to sign the Form.