Collect client intake forms before they arrive

> *“Clients show up, spend 15 minutes filling out paper clipboards in the waiting room, and it throws off the whole schedule.”*

Category: operations **Setup Time:** ~45 minutes **Estimated Hours Saved:** 5 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Require a digital intake form to be completed right after booking, before the appointment is fully confirmed. Link the form directly in the booking confirmation email; where the form will carry health information, choose a tool that signs a Business Associate Agreement and have your compliance counsel confirm the setup. This ensures you have their history before they walk in the door, allowing you to prepare properly and starting their appointment exactly on time.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Jotform:** **(Free Tier / Wholesale)**
- **Google Forms:** **(Free Tier / Wholesale)**
- **Acuity / Jane App:** **(paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Check your existing tool**
   If you use Jane App, Mindbody, or Acuity, build the form natively there first.

2. **Digitize your clipboard**
   If using Jotform, translate your paper form into a clean mobile-friendly format.

3. **Update your confirmation email**
   Add a bold link to your booking tool's confirmation email: 'Action Required: Please complete your intake form before arriving.'

4. **Add a reminder**
   In your 24-hour appointment reminder, add: 'If you haven't filled out your intake form yet, please do so here: [Link].'

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: What if they still don't fill it out?

A: Have an iPad ready in the waiting room. But getting even 70% of clients to do it beforehand saves hours.

Q: Is Google Forms secure enough for medical or health intake forms?

A: Standard Google Forms is fine for basic contact info, but charting that carries health information needs tools that offer a Business Associate Agreement — like Jotform Enterprise, Jane App, or Boulevard — and a review by your compliance counsel before launch.