Get consent forms signed before the appointment

> *“Consent forms get signed on a clipboard in the treatment room, which eats time and leaves paper we have to store.”*

Category: operations **Setup Time:** ~35 minutes **Estimated Hours Saved:** 3 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Send the consent form for electronic signature when the appointment is booked, rather than handing over a clipboard on arrival. A form signed in advance removes the wait at the start of the visit, produces a timestamped record that is far easier to store and retrieve than paper, and stops appointments running late because someone is still reading page two.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking or clinical system:** **(Free Tier / Wholesale)**
- **Jotform:** **(Free Tier / Wholesale)**
- **Documenso:** **(Free Tier / Wholesale)**
- **DocuSign:** **(paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Check what your existing system already does**
   Clinical and booking systems increasingly include signature capture. Adding a second tool splits your records across two places, which is worse than slightly clunkier signing.

2. **Confirm the form is still valid signed electronically**
   For most consent this is fine, but requirements vary by jurisdiction and by procedure. Confirm before you switch — this one is worth asking about rather than assuming.

3. **Send it with the booking confirmation**
   Not the night before. People deal with it when they are thinking about the appointment, which is the moment they booked.

4. **Set one reminder for anyone who has not signed**
   Twenty-four hours before. One reminder, not three.

5. **Keep the paper route available**
   Some people will not sign on a phone. A clipboard in reserve is not a failure of the system.

6 **Check where the signed forms are stored and who can see them**

Signed health forms carry real handling obligations. Know where they live before you start collecting them.

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: Is an electronic signature legally valid?

A: In most contexts yes, but this varies by jurisdiction and by document type, and health consent has its own rules. This is not legal advice — confirm for your setting before switching.

Q: What does it cost?

A: Possibly nothing if your clinical system includes it. Otherwise free tiers exist with monthly submission limits; dedicated services charge per user or per envelope.

Q: What about people who arrive without having signed?

A: Keep the clipboard. The gain is the eighty percent who sign in advance, not eliminating paper entirely.