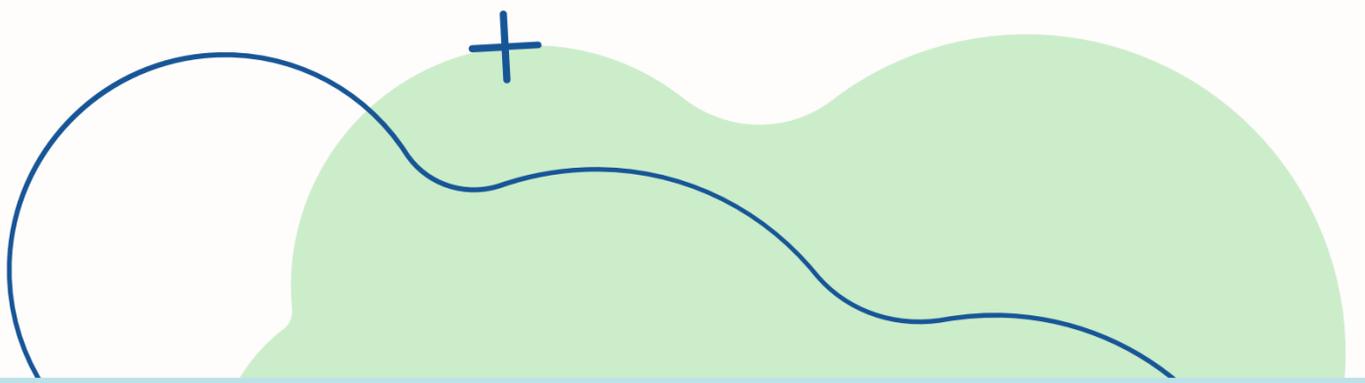


Intelliform User Guide

Getting started with
paperless screening

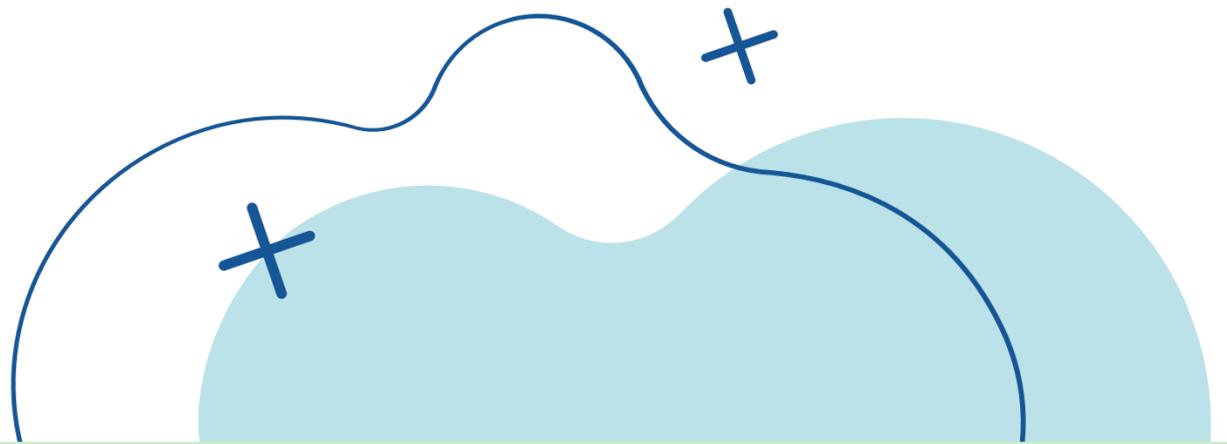
What is Intelliform?



Intelliform is a convenient, web-based paperless solution for businesses to pre-screen customers for COVID-19 before they make an appointment. It provides a seamless experience between the office and the customer/patient as it eliminates the need to print, sign, scan and sort physical forms.

Intelliform is also accessible anytime, anywhere, on any device. This allows your business to keep a history and a log of those who have already been screened to meet any mandated industry standards and enable effective contact tracing.

Enhance your process



Screening Management

Save forms are stored in one place, making them easily accessible anywhere, anytime, for effective contact tracing

Pre-Set Forms

Standardize your screening process and ensure that each customer is asked the same questions with our pre-set forms

Enhanced Safety

Eliminating the need for paper forms eliminates a high-touch surface, and in turn makes the office a safer space

Getting Started

Start your paperless screening process by first signing up for a free account on intelliform.ca!

Step 1

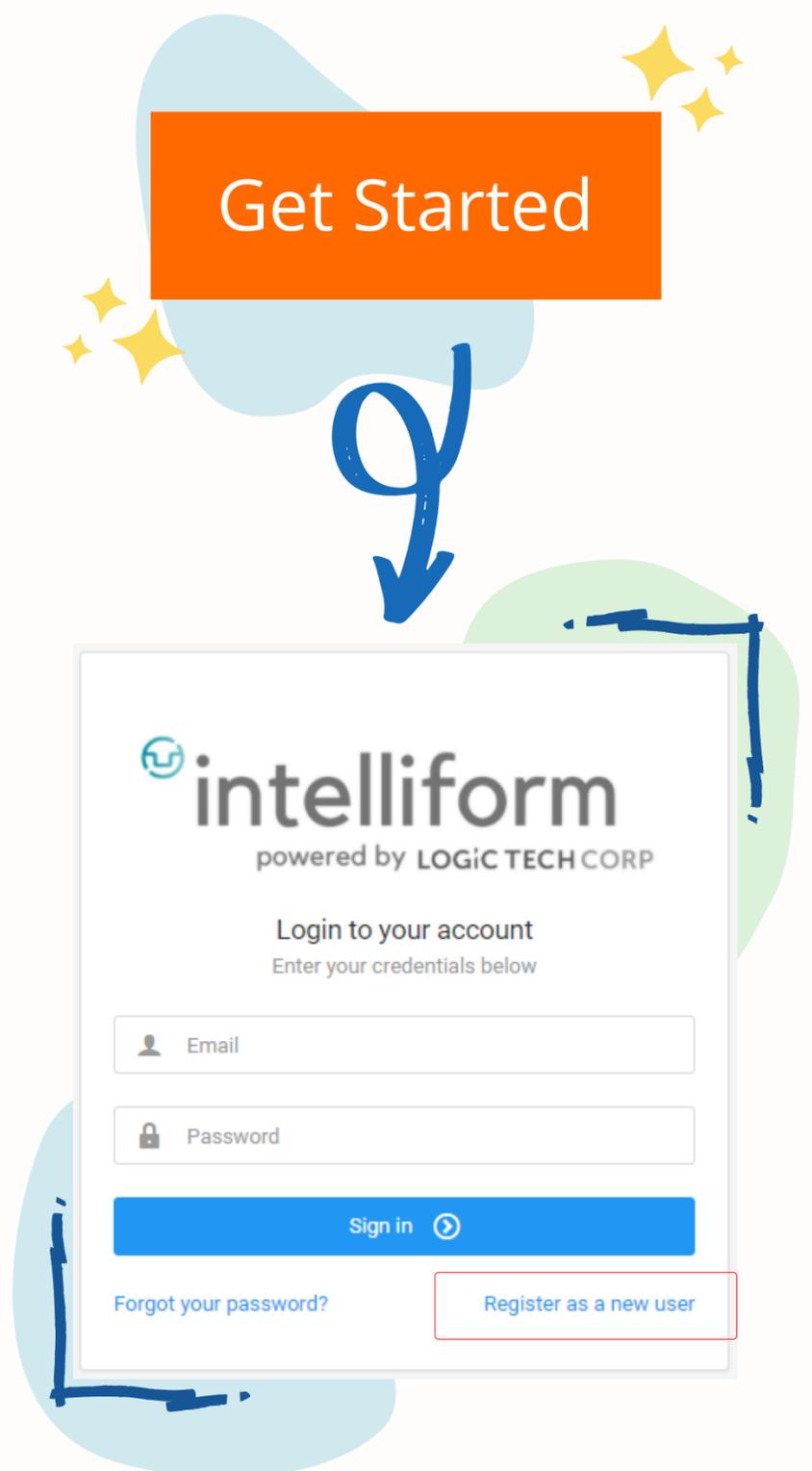
Click the 'Get Started' button

Step 2

Create a new account

Step 3

Click the link in the confirmation email and log in

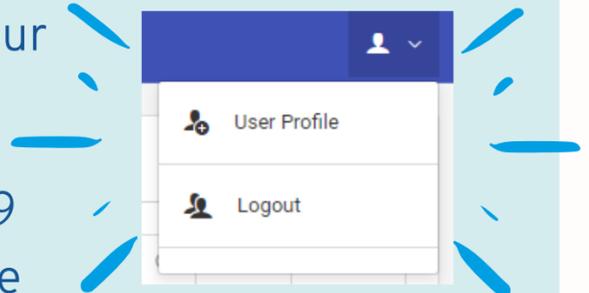


Navigation

Entries page

The screenshot shows the INTELLIFORM interface. At the top right, a user profile icon is labeled '1'. Below it, a navigation menu is labeled '2'. The main content area is titled 'Entries' and contains a table of records. A search bar is labeled '5', and a table with sort buttons is labeled '6'. An 'Add Entry' button is labeled '4'. A dropdown menu for actions is labeled '7'. The table has columns: Subscriber, Email, Form Name, Pre-Screen, Pre-Screen Date, In-person, In-person Date, and Actions. A single record for John Smith is shown.

1. Control panel - allows you to edit your profile information and log out



2. Entries page - view all the COVID-19 screening and consent forms that have been filled out and saved

3. Subscribers page - view and modify your customer's information from this page

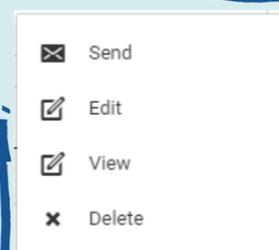
4. Add new entry
Select subscriber and form to fill out for them to create a new entry

A form with two dropdown menus: '-Select Subscriber-' and '-Select Type-'. Below them is a link: 'If you want to add new [subscriber], Click Here'. At the bottom right are 'Close' and 'Add' buttons.

5. Search bar - help you easily find a customer's forms

6. Sort buttons - use  to sort entries

7. More actions - send customer responses, edit certain forms, view customer responses and delete entries



Navigation

Subscribers page

INTELLIFORM ☰ Tiffany Leung

Subscribers 8 Add Subscriber

Show 20 9 Search: joh

Name	Email	Phone	Last Updated	Actions
John Smith	abc@def.com		2020-12-22	☰ 10

Showing 1 to 1 of 1 records (filtered 1 from 5 total records) 1

8. Add Subscriber - build your customer list for quicker access when you create new forms

Make sure to double check their contact information before saving

Subscriber Information

First Name
Last Name
Middle Name
Salutation
Please select
Email
Phone
CustomID
Close Save

9. Search bar- easily search for a customer by name, email or phone number

10. More actions - view, modify or delete your customer's information

*For Advanced Plan users, there will be options to send forms via SMS or Email in this dropdown menu



Modify
Delete

Adding a new Customer

From the Subscribers page

Step 1

Click the 'Add Subscriber' button

Step 2

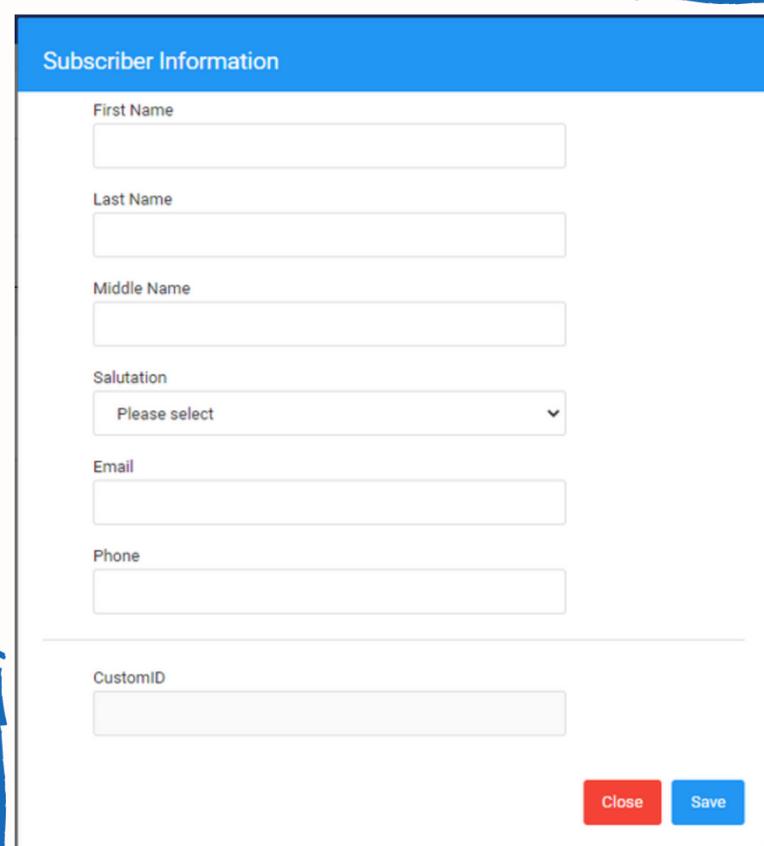
Enter customer information

Step 3

Click the link the in the confirmation email and log in



Add Subscriber



Subscriber Information

First Name

Last Name

Middle Name

Salutation
Please select

Email

Phone

CustomID

Close Save

Adding a new Customer

From the Entries page

Step 1

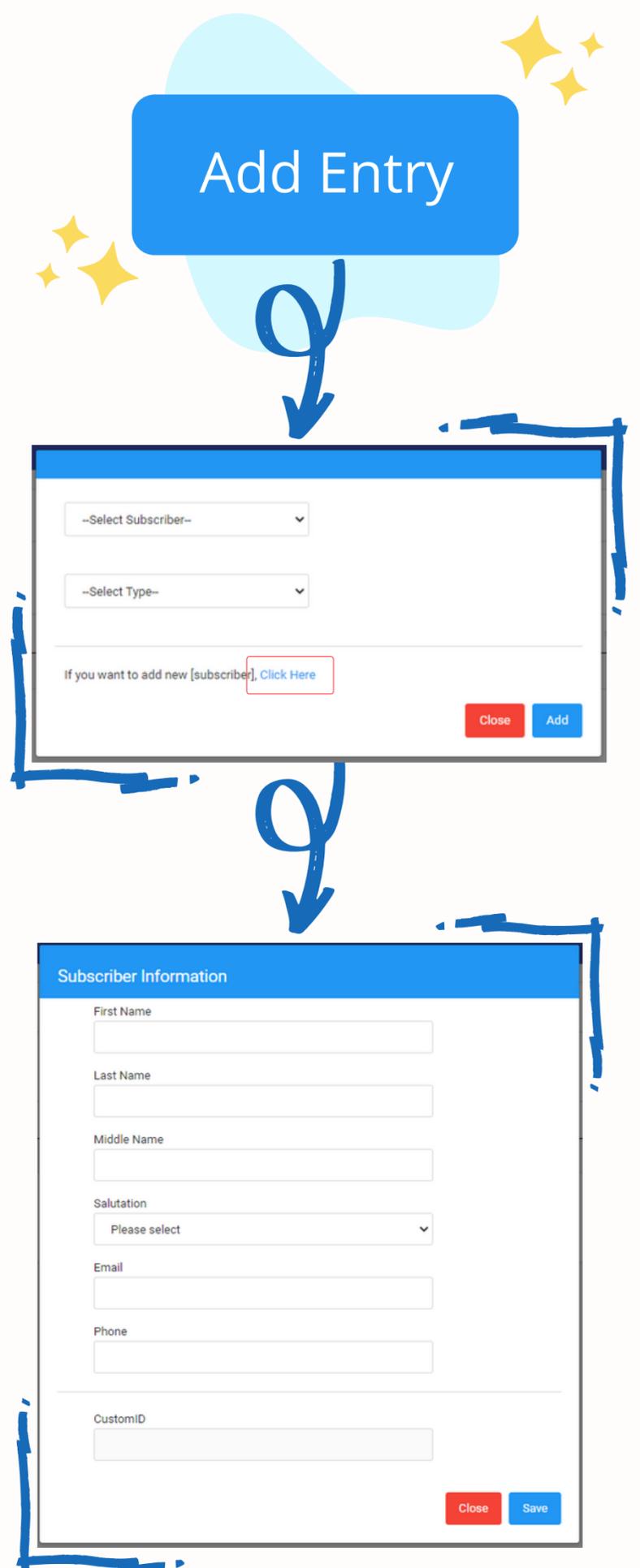
Click the 'Add Entry' button

Step 2

'Click Here' to open Subscriber window

Step 3

Enter and save your customer information



Filling a new form

Best for screening customers before their appointment

Step 1

Click the 'Add Entry' button

Step 2

Select subscriber and form to fill

Step 3

Ask your customer the questions on the form and save responses

*Consent form can be signed by customer on a tablet when they arrive at your place

Add Entry

--Select Subscriber--

--Select Type--

--Select Type--

Pre-Screen and In-Person Form

Pre-Screen Form

In-Person Form

Consent Form

Screening Form - Mobile Friendly

Close Add

INTELLIFORM

Screening Details

Staff Screener

Subscriber Name

Subscriber Age

Who Answered John Smith

Contact Method Phone Email Other

COVID-19 Screening Questions

In-person [12/22/2020 15:49:27]

Identify yourself and explain the purpose of the call, which is to determine whether there are any special considerations for their dental appointment. Have the patient answer the following questions.

	In-person
1. Do you have a fever or have felt hot or feverish anytime in the last 10 days? Patient temperature at appointment: <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No

? Do you have a confirmed case of COVID-19 or had close contact with a confirmed case of COVID-19?

Sending forms via SMS or Email

For advanced plan users

Step 1

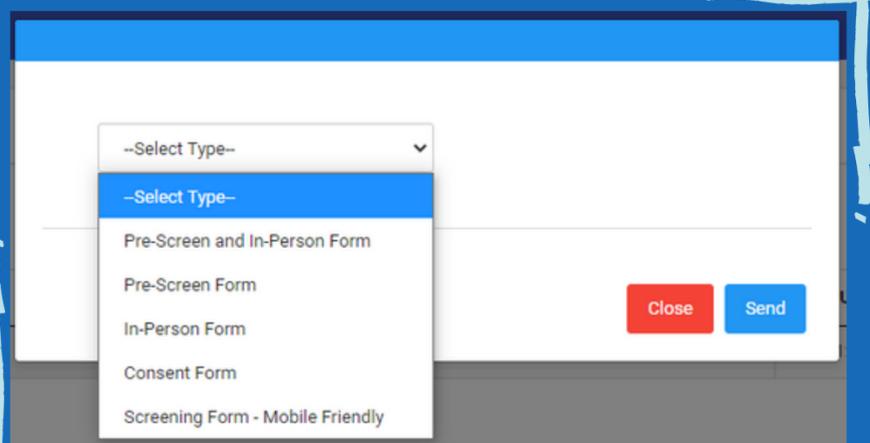
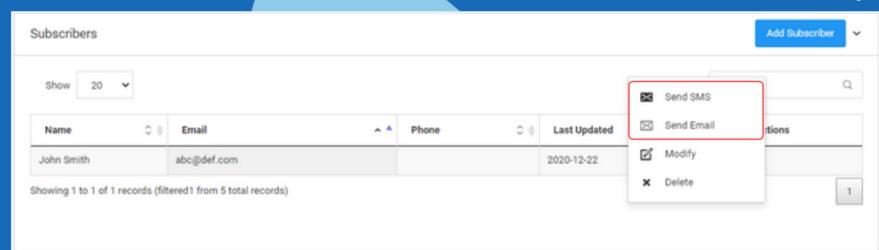
Click more actions
 button next to your
customer's name

Step 2

Select 'Send SMS'
or 'Send Email'

Step 3

Pick a form and
click 'Send'

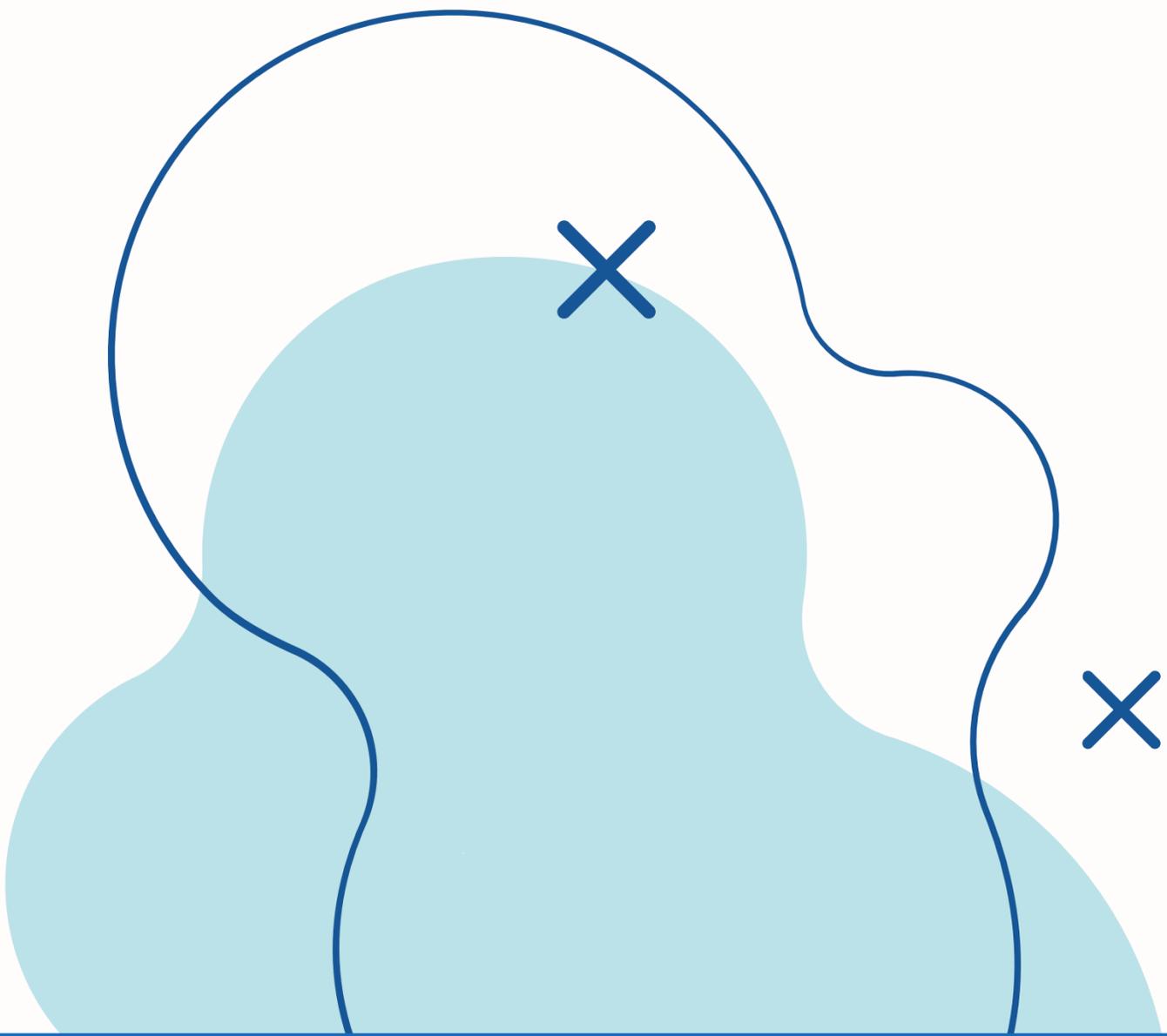


TIP 1: send the mobile friendly screening form if you are sending SMS

TIP 2: use the 'Pre-Screen and In-Person Form' if you want to screen patients twice - you can edit the form to fill in the form again when the customer arrives

You customer will receive a link to the form and can fill it in anywhere, anytime.
The form will then save onto your account for your records

Contact Us



**To learn more about Intelliform,
visit us at intelliform.ca**

For technical support, please visit
our forum at:

<http://intelliform.ca/forum>