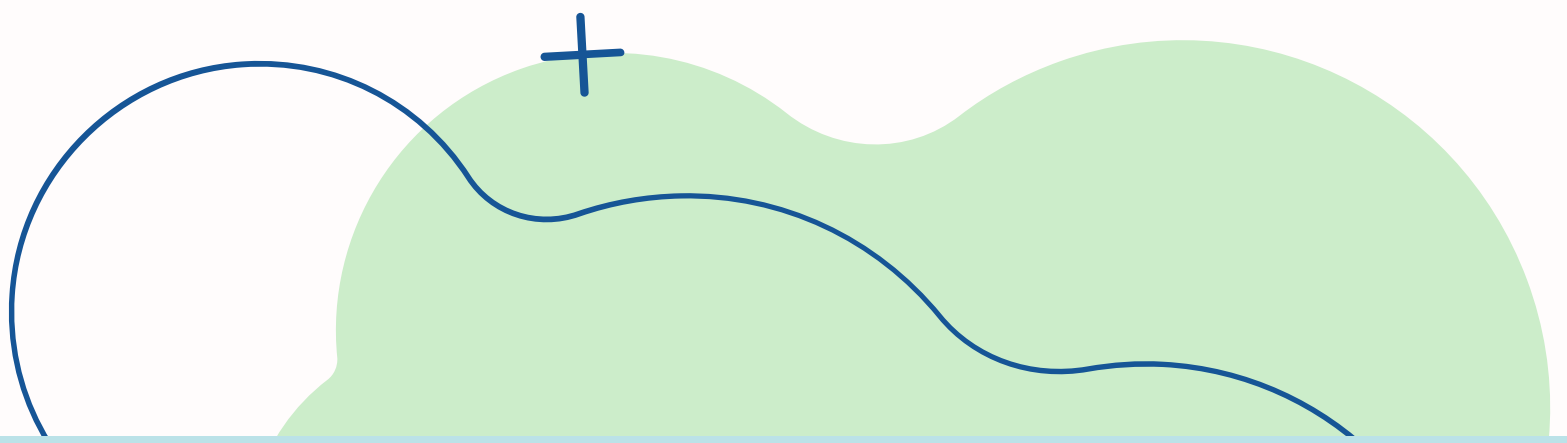# Intelliform
## User Guide

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
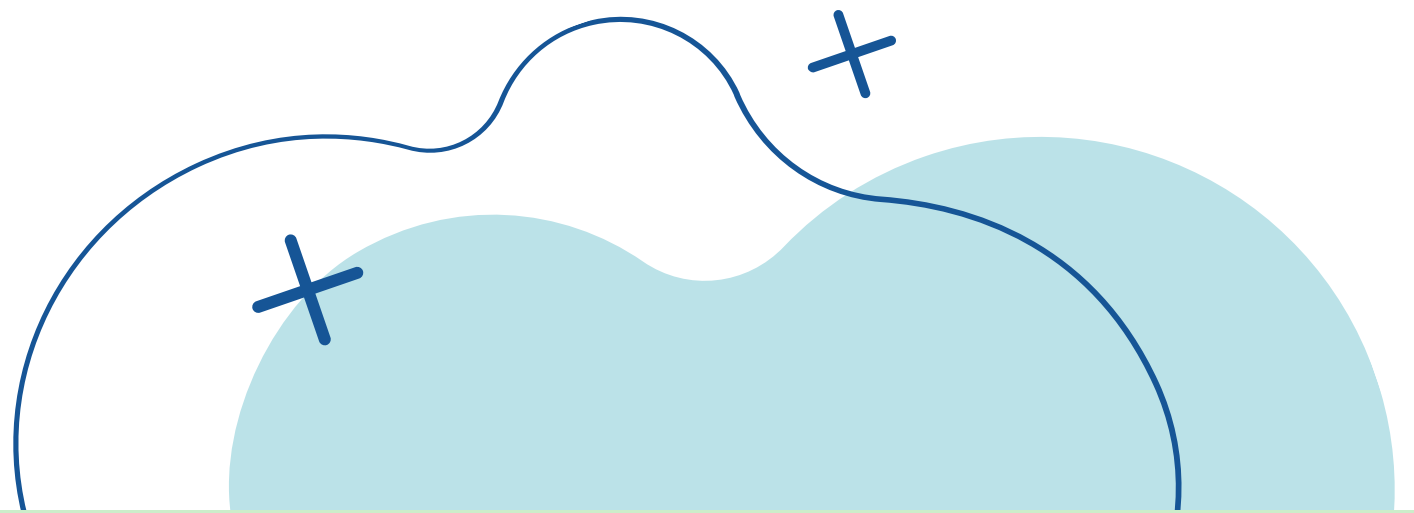
## Screening Management

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

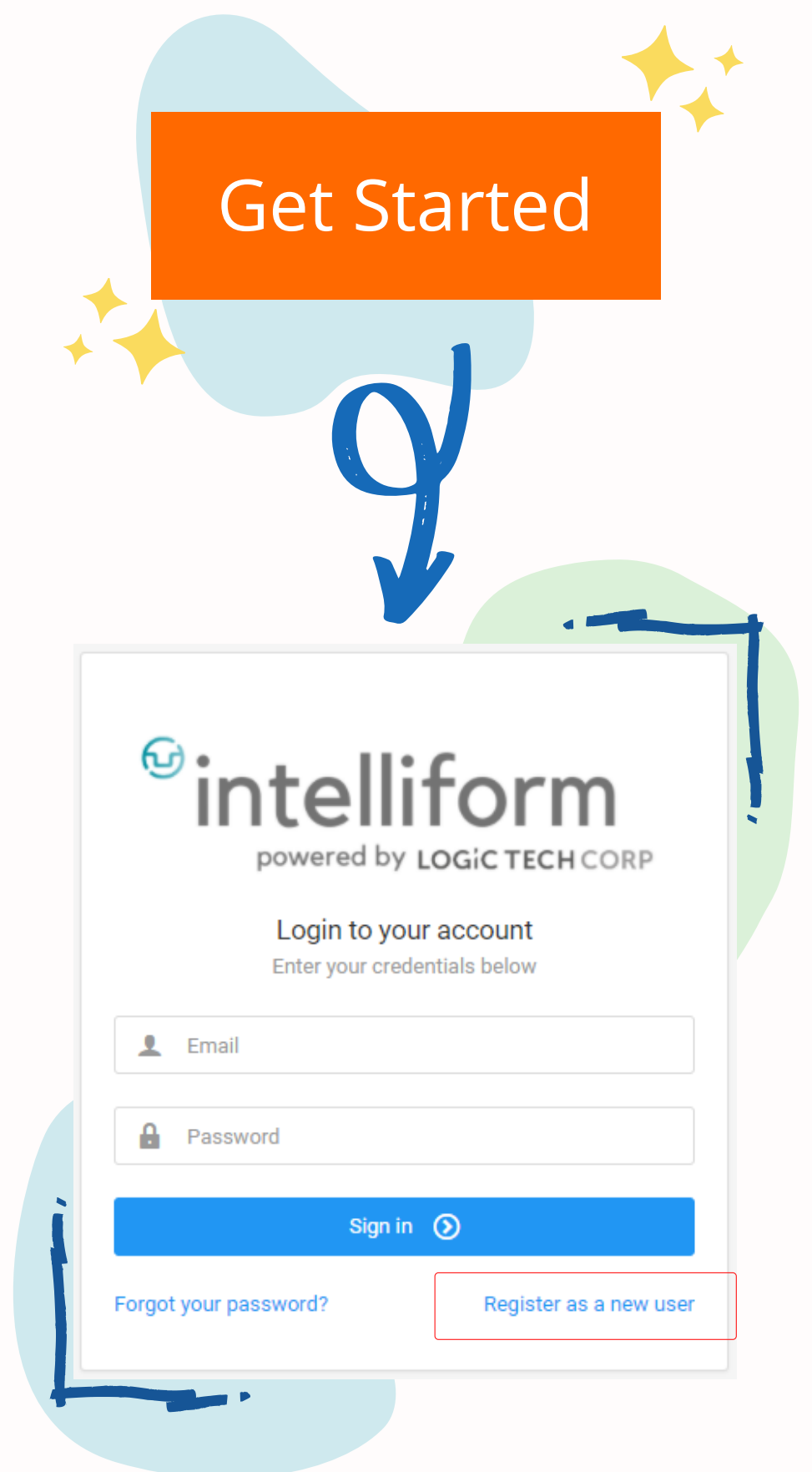Start your paperless screening process by first signing up for a free account on intelliform.ca!

## Step 1

Click the 'Get Started' button

Get Started

## Step 2

Create a new account

## Step 3

Click the link in the confirmation email and log in

### intelliform
powered by LOGiC TECH CORP

Login to your account
Enter your credentials below

Email

Password

Sign in

Forgot your password?

Register as a new user

# Navigation
## Entries page

**INTELLIFORM** ☰

**Entries**

| Subscriber | Email | Form Name | Pre-Screen | Pre-Screen Date | In-person | In-person Date | Actions |
|---|---|---|---|---|---|---|---|
| John Smith | abc@def.com | In-Person Form | ○ | - | ◉ | 2020-12-22 10:31 | ☰▾ |

Add Entry

Search:    Show 15

Showing 1 to 1 of 1 records

1

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

👤▾
  👤 User Profile
  👤 Logout
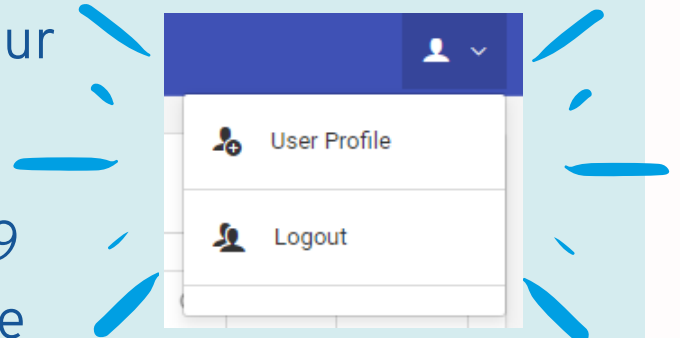
**2. Entries page** - view all the COVID-19 screening and consent forms that have been filled out and saved

**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

--Select Subscriber--
--Select Type--
If you want to add new [subscriber], Click Here
Close   Add

**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

✉ Send
✎ Edit
✎ View
✕ Delete
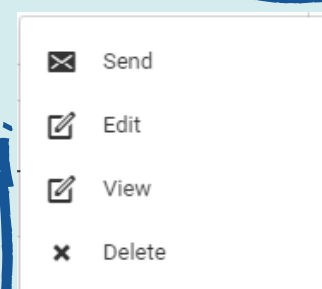
# Navigation
## Subscribers page



**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 (filtered1 from 5 total records)   [1]

---

**Subscriber Information**

First Name

Last Name

Middle Name

Salutation
Please select ⌄

Email

Phone

CustomID

Close  Save

---

**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

**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
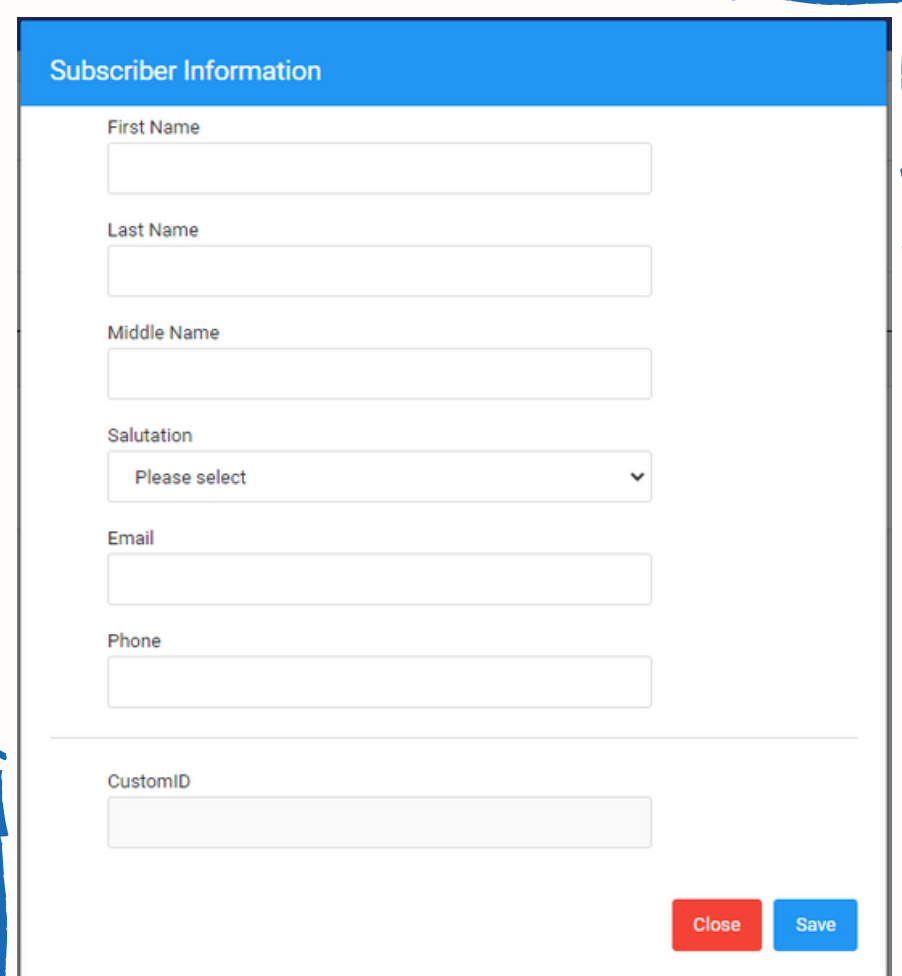
## Step 1

Click the 'Add Subscriber' button

Add Subscriber

## Step 2

Enter customer information

### Subscriber Information

First Name

Last Name

Middle Name

Salutation
Please select

Email

Phone

CustomID

Close    Save

## Step 3

Click the link the in the confirmation email and log in

# Adding a new Customer

From the Entries page

**Add Entry**

## Step 1

Click the 'Add Entry' button

--Select Subscriber--

--Select Type--

If you want to add new [subscriber], Click Here

Close    Add

## Step 2

'Click Here' to open Subscriber window

## Step 3

Enter and save your customer information

Subscriber Information

First Name

Last Name

Middle Name

Salutation

Please select

Email

Phone

CustomID

Close    Save
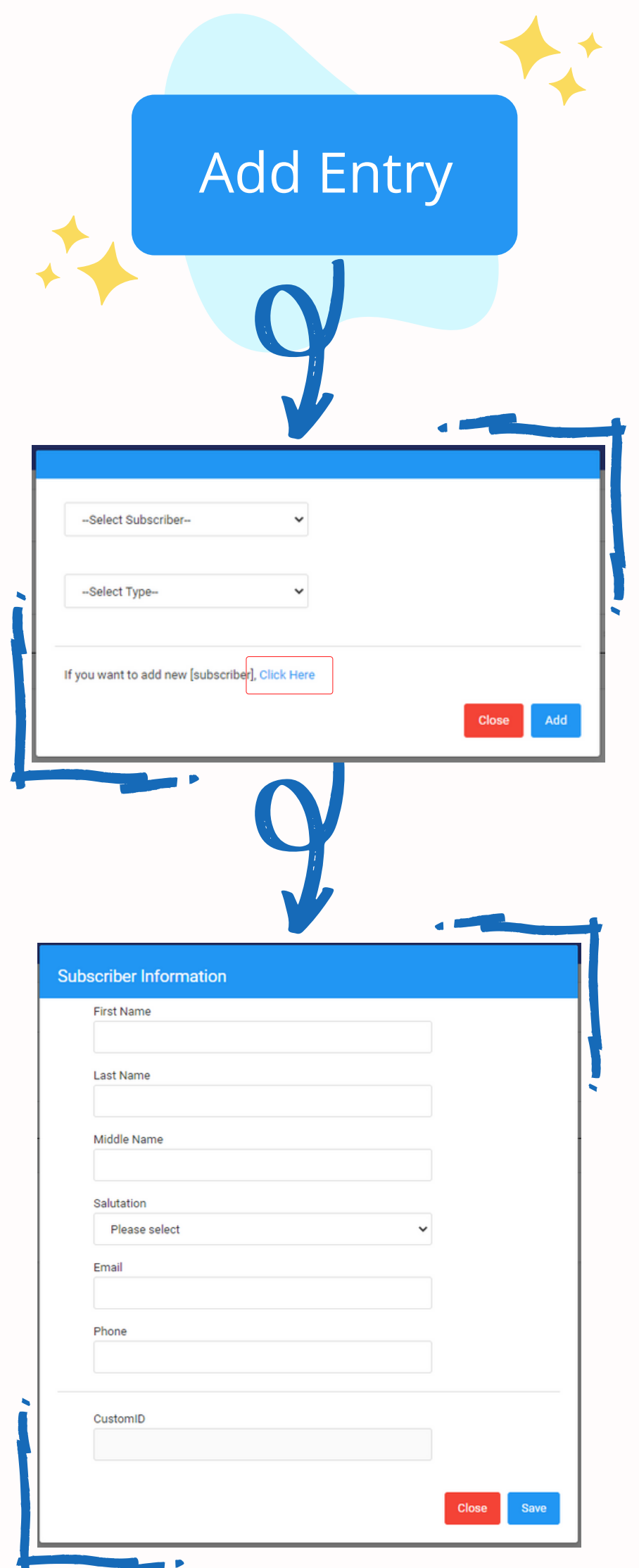
# Filling a new form

Best for screening customers before their appointment

## Step 1

Click the 'Add Entry' button



Add Entry

## Step 2

Select subscriber and form to fill

--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

## 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

INTELLIFORM ≡

Screening Details

Staff Screener

Subscriber Name       John Smith

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:                                          Yes    No

2. 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

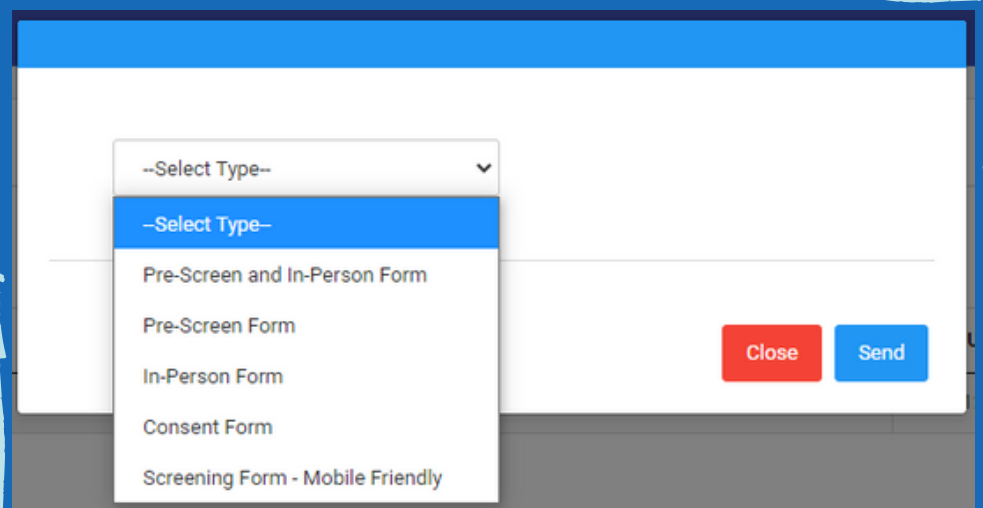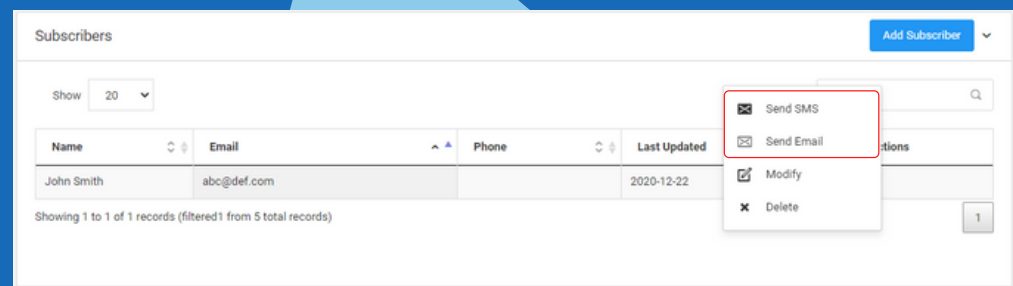### Step 1

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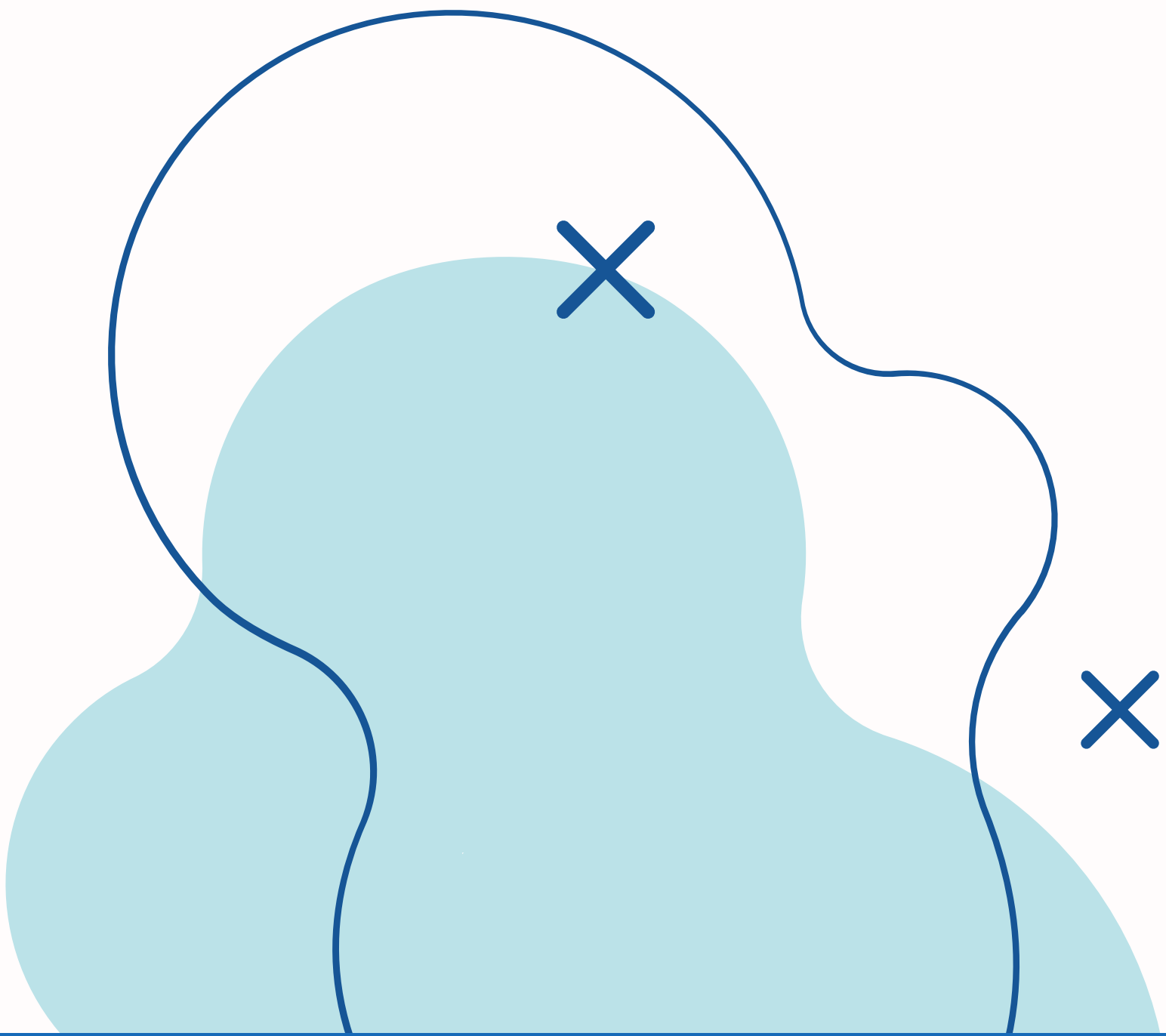
To learn more about Intelliform, visit us at intelliform.ca

For technical support, please visit our forum at:

http://intelliform.ca/forum