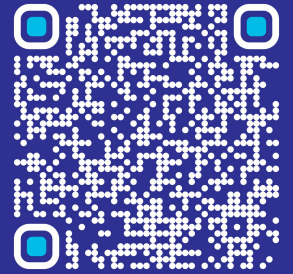


How to Maximize the Benefits of Online Forms

*Download the
Worksheet!*



The OMS Practice

Exploring the informational needs of the OMS practice.

Providing Unique Patient Experiences
Through Patient Communication Software

Forms Are A Conversation

Patient forms are a conversation.

Each side of the conversation has a different need and something to deliver.



Time for a poll!

POLL QUESTION:

How often do you get incomplete/ incorrect information on your patients forms?

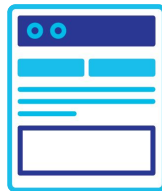
A. Infrequently. **B.** About half the time. **C.** Almost all the time

How to Maximize the Benefits of Online Forms

A Overview: Different Form Types



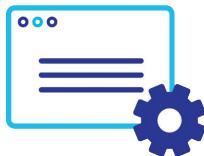
Paper Forms



PDF Forms



Web Forms

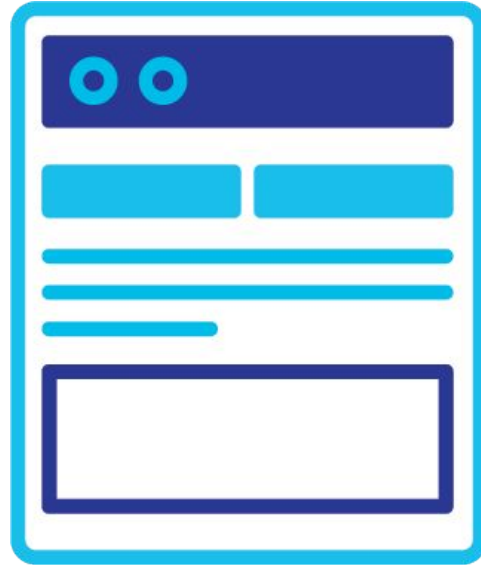


**Forms that are built
into dental software**



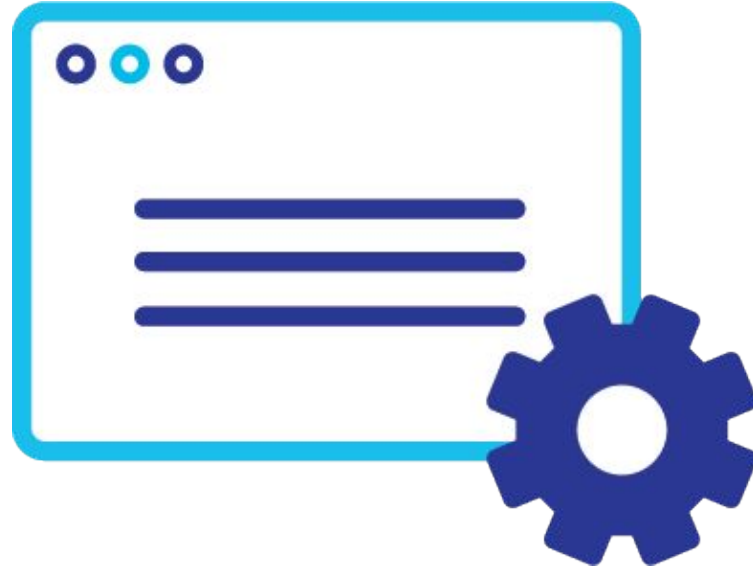
**Forms as a
service**







Forms That are Built Into Dental Software







Time for a poll!

POLL QUESTION:

What kind of forms are you using?

A. Paper forms **B.** PDF Forms **C.** Web Forms

D. Forms that are build into dental software . **E.** Forms as a service

The Forms Journey

1

**Patient Intake &
Medical History**

2

Wellness Screening

3

**Patient
Consent Forms**

4

**Pre-Appointment
Instructions**

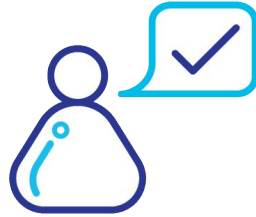
5

**Post-
Appointment
Instructions**

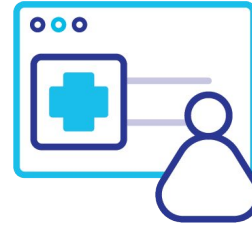
6

**Satisfaction
Surveys**

Patient Intake Forms



**Patient Information
& Insurance**



**Medical History
Form**

Some Tips for Patient Intake Forms & Medical Histories

The screenshot shows the 'New Patient Registration' form with the 'Insurance Information' section. It contains two questions: '1. Dental Insurance' and '2. Medical Insurance', both with 'No' and 'Yes' radio buttons. A callout box points to the questions, stating: 'Provide conditional questions that adapt to the answer that the patient provides, offering pertinent sections depending on whether they answer yes or no.'

Conditional questions

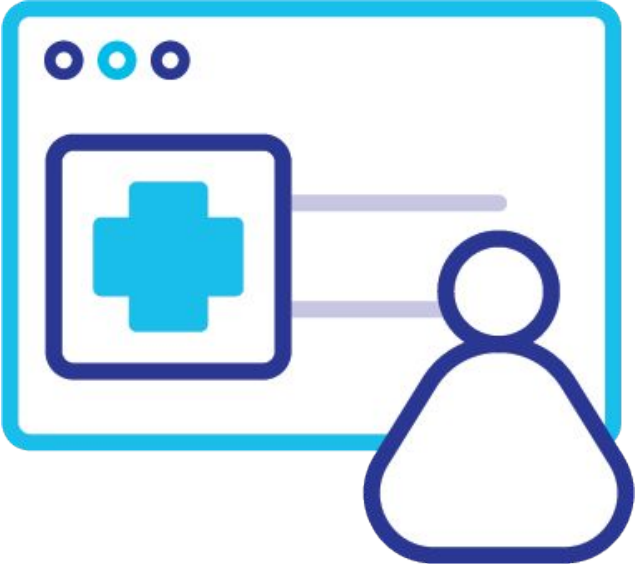
The screenshot shows the 'New Patient Registration' form with the 'Patient Information' section. It includes fields for 'First Name*', 'Preferred Name', 'Last Name*', 'Date of Birth*', 'Sex*', and 'Gender Identity'. A callout box points to the 'Sex*' field, stating: 'It's good to make information necessary to help with the completion of the form.'

Required questions

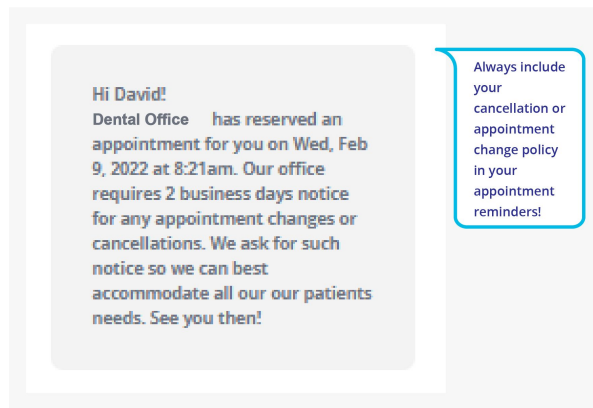
The screenshot shows the 'New Patient Registration' form with the 'Policy Holder' section. It includes fields for 'Policy Holder First Name*', 'Policy Holder Last Name*', 'Policy Holder Date of Birth*', 'Insurance Company*', 'Policy or Group Number*', 'Member or ID Number*', and 'Policy Holder Social Security Number'. A callout box points to the 'Policy or Group Number*' field, stating: 'If possible, having the keyboard or the number board appear depending on what type of input is needed from the patient makes the form more user-friendly.'

Mobile-friendly UI/UX

Wellness Form



Wellness Form - tip!

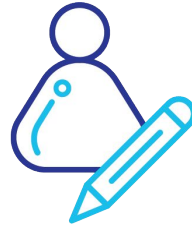


**Offer your patient
an opportunity to
reschedule.**

Consent Forms



HIPAA Consent



**Procedure Consent
Forms**

Consent Forms - tip!

The image shows a screenshot of a digital consent form. At the top, it asks for confirmation: "1. Please confirm:" followed by a checked checkbox "I have received a copy of the notice of privacy practices." Below this, it asks "Who is providing consent for storing health records?" with three radio button options: "I am providing consent for myself", "I am a parent or legal guardian providing consent for the patient", and "I do not wish to have health records stored." The "I am a parent or legal guardian..." option is selected. There is a signature field with a "Sign here" placeholder and a blue asterisk button. Below that is a date field labeled "Today's Date*" with a dropdown arrow and the format "yyyy-mm-dd". At the bottom, there are four text input fields for "Patient's First Name*", "Patient's Last Name*", "Consenting Adult's First Name*", and "Consenting Adult's Last Name*". A blue callout box with a white background and a blue border contains the text: "Notice that again that conditional questions can be used here to allow your patient to answer on behalf of a minor." A blue "Complete" button is located to the right of the callout box.

Tip: create conditional questions!

Pre- and Post-Appointment Instructions



Pre- and Post-Appointment Instructions - Tips!

Hi David! Please confirm your appointment on Wed, Feb 9 at 8:28am at Your Dental Office.

Simply reply to this text with "C" to confirm this time. If you require any pre-medication, please remember to take it prior to your appointment.

Please do not have anything to eat or drink (including water) 8 hours prior to your surgery.

*Please call (888) 555-1234 to discuss if any of these apply to you: 1) You or a housemate have a cough, fever, or shortness of breath 2) You traveled outside the country in past 2 weeks 3) Someone in close contact has been diagnosed with COVID-19

Include an option to confirm. This will give you a better sense of whether or not you can expect a no-show for the appointment.

Be sure to include reminders about pre-medication and any preoperative instructions. This increases the likelihood of a positive appointment outcome!

Hello David. This is Your Dental Office. Please visit [LINKHERE](#) to view the instructions to follow after your visit today. If you have any concerns or questions after reading this handout, please contact us at (888) 555-1234. Thank you.

Always be sure to include contact information so that the patient knows who to contact in case of follow-up questions.

Build your appointment instructions into your messaging cadence!

What's the big deal with satisfaction surveys?

Your patients are the experts in their own experience - gain knowledge from their expertise!



Satisfaction Surveys - Tip!

Positive Feedback Message
We're happy to hear that! Please help us bring more smiles by leaving a review. It's simple—just click the link: [Feedback Link]

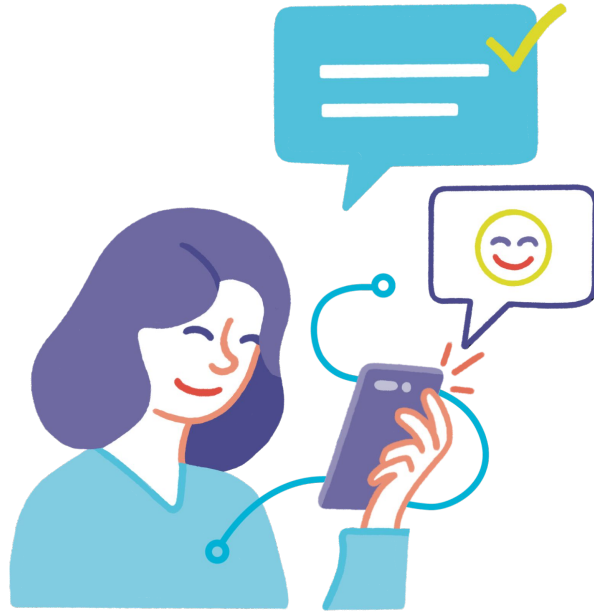
Negative Feedback Message
We are very sorry that you didn't have a great experience. Someone from our office will contact you to speak with you about your visit.

Provide a link to the social medium of your choice - Google Reviews are especially valuable!

Offer a follow-up if your patient didn't enjoy their experience.

Ask them for a review on the social of your choice!

What if we could automate this?



The Ideal Automation Sequence - The Consult

1

**Patient Intake Forms,
Medical History, &
HIPAA Consent**

1 week before consultation,
with another reminder at 48 hours

2

**Appointment
Confirmation**

Sent 3 days before appointment

3

**Wellness Screening,
Appointment Reminder,
and Referral Form
Reminder**

Sent 24 hours
Before consultation

The Ideal Automation Sequence - Procedure-Specific Appointment

Automate form send-off according to your patients' journey

1

**Pre-Appointment
Instructions & Procedure
Consent**

Sent 5 days before appointment -
with another reminder at 48 hours

2

**Appointment
Confirmation**

Sent 48 hours
before appointment

3

**Wellness Screening
& Fasting Instructions, if
relevant**

Sent 24 hours
before appointment

4

Post-Appointment Instructions

Sent the same day as the procedure.

5

Satisfaction Survey

Sent at the conclusion of the patient journey.

Why is the right automation sequence so essential?

For the same reason that timing for sending any form is essential!

Your patient has a more user-friendly, supported experience when you send the right message at the right time.

Time-Savings

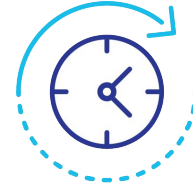
Some changes you can expect to see are:



**70% Form
Completion Rate**



**Decreased
Operational
Costs**



**Increased
Time-Savings**

Reduction in Manual Tasks | Reduction in Time Spent on Forms Logistics

Maximizing staff work time | Improves accuracy | An important tip: always automate where possible!

Compliance with regional standards



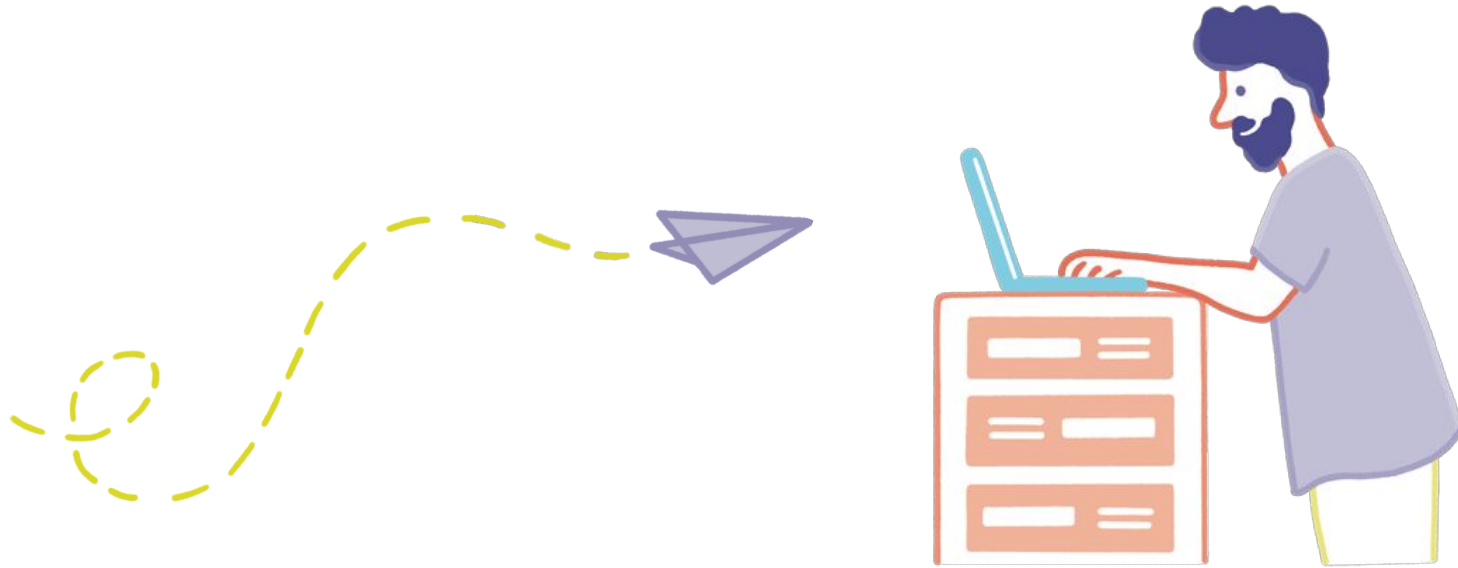
HIPAA Compliance



In Canada: PIPEDA Compliance

But this is not what actually keeps you safe.

Security - Not Just About Compliance



The Difference That Online Forms Make

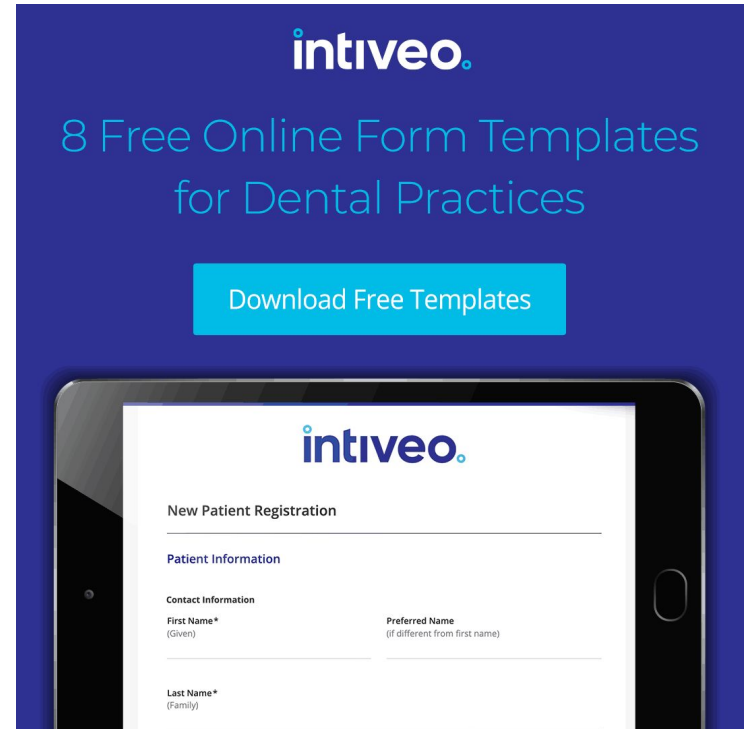
The Key Takeaways

- Utilize different types of forms to ask detailed, thorough questions of your patients. Much more detail can be mined with online forms - space isn't limited!
- Maximize the ability to send the right message at the right time. Give your patients the time to answer the questions on each form. Support them in having a positive patient experience!
- Maintain PHI and general security by ensuring your software is regionally compliant (HIPAA, PIPEDA, etc.) and **also** follows best SaaS practices.
- Lean into time-savings by automating your forms and utilizing your software to the fullest extent.

To Get You Started:

Intiveo's Commitment

A package of free templates of online forms!



The image shows a promotional banner for Intiveo. At the top, the Intiveo logo is displayed in white on a dark blue background. Below the logo, the text "8 Free Online Form Templates for Dental Practices" is written in a light blue font. A bright blue button with the text "Download Free Templates" is positioned below the text. Below the button, a tablet displays a sample form titled "New Patient Registration". The form includes sections for "Patient Information" and "Contact Information". Under "Contact Information", there are two columns: "First Name*" (Given) and "Preferred Name" (if different from first name). Below these, there is a "Last Name*" (Family) field.

After Today:

**If after today's Q&A you have any follow-up questions,
please don't hesitate to reach out and stay in touch!**

We're available at info@intiveo.com

www.intiveo.com

Q & A

Thank you so much for attending!

See you at SOMSA 2022!

Who will you see?

John Ing, Director of Sales

Alex Webb, Sales Team Lead

We'll be at booth 40!

info@intiveo.com

www.intiveo.com