DIGITAL FORMS AND EFORMS

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E-FORMS

Diary e-Forms are electronic forms that can be sent off an appointment in VETLINKPRO [**Right click -> Add Form for e-capture**] to an Android or Apple Tablet. Clients can then review, accept and sign directly on the device. These forms are then automatically filed back in VETLINKPRO over Wi-Fi to create a fully paperless office for the likes of Consent and Account Application forms. A number of e-form templates are included as examples which can be customised by users to suit your business. VetlinkPro can also design forms on a chargeable basis. Alternatively you or your web designer could do it noting that some HTML knowledge is required.

Note: We recommend an iPad for running VETLINKPRO e-Forms. There is also an Android version available on Google Play, however as Android makes and models differ greatly and we can't guarantee compatibility on older devices or less well known brands. The app will not work on landscape devices . We highly recommend "name brand" portrait devices such as Samsung, LG etc.

E-forms Setup

Enable eForms

1. Ensure VETLINKPRO is upgraded to version 7.2
2. VetlinkPro staff will need enable module, install services and help local technicians with any port configurations.
3. Insert your Clinic logo and set the colour theme from **Options | Setup | Misc | Colour Themes | Set Logo**

Create eForms

1. Go to **Options -> Picklist -> Diary -> Diary Forms**
2. To create or edit a form:
    - Double-click an existing form to add digital form functionality, or click '**+**' to add a new form.
    - Tick **'Digital Form'**.
    - Enter a Name.
    - Set **Belongs To**: Choose where the form will attach (Client Document Manager, Patient Document Manager, or Clinical History).
    - Click the **Form icon** to edit and design the form.
    - Form Design Recommendations
        - Use a table with 100% width and 0 border size for mobile compatibility.
        - Inside the main table, use nested tables for alignment.
        - Keep one field name and input field per line for mobile-friendly layout.
        - Use Mailmerge button to insert variables (e.g., @Firstname, @AnimalName).
        - For input fields
            1. Name helps identify fields later (e.g., quoteLow, quoteHi).
            2. Character Width: Recommended ~25.
            3. Value: Default value or mailmerge variable.
        - Checkboxes
            1. Non-mandatory
            2. mandatory using Mandatory_Check_Box.
            3. Privacy consent: Use Privacy Consent Checkbox.

- Signature: Insert via mailmerge option.
- **Example format**

Clinic Name / Logo	

FirstName	@Firstname (mailmerge variable)
Last Name	@Lastname
Phone	@Cellular
Patient Name	@AnimalName
Species	@AnimalType
Weight	@Animal_Weight

The wellbeing of your pet is our primary concern. We perform a full physical examination…
☐ I hereby consent …

@Signature Inserted Here

Download eForms App

1. Download VETLINKPRO e-Forms from the Apple or Android store.
2. Open the app.
3. Enter **API key** as supplied from VetlinkPro support and choose **Device Name** of your choice.
4. Next select your **branch**, choose a **password**, enter a **timeout** period, choose **new client form** to use (if you have one) and click save.

Using e-Forms

1. From VETLINKPRO diary right click on an appointment and choose **Add Form for e-capture** then select Form to use
2. Form will be available on all tablets with e-Forms.
3. You may wish to Confirm Client Details first. If details change they will be sent back to VETLINKPRO. The form will need to be resent from VETLINKPRO however for the new details to show correctly on the tablet form.
4. Click **Forms to Process** then enter your security pin.
5. Select the form you wish to process and hand the tablet to the client.
6. Clients can confirm or edit their details.
7. Client can complete, confirm and sign form.

8. After clicking **Done** and the tablet is handed back to staff. A prompt will ask the staff to review the form to ensure it is filled in correctly.
9. If the form is correct the staff member can click **submit**.
10. Enter your **security pin** to verify a staff member has checked the form.
11. The completed eForm is saved on appointment and then moved to Clinical History, Patient, or Client record once visit starts (Depending on Belongs To configuration option)

NOTE: Client details can also be synced to the tablet from the **Action menu** at the bottom of the **Client record**. Details can then be confirmed on the tablet by clicking Confirm Client Details.

DIGITAL FORMS

Digital Forms Setup

Enable Digital Forms

1. Upgrade to version 7.2
2. VetlinkPro staff set enable services and help local IT technician with any port configurations.
3. Navigate to: **Options -> Setup -> Misc -> General tab**
4. Tick **Use Digital Forms**.

Create Digital Forms

3. Go to **Options -> Picklist -> Diary -> Diary Forms**
4. To create or edit a form:
    - Double-click an existing form to add digital form functionality, or click '+' to add a new form.
    - Tick **Digital Form**.
    - Enter a Name.
    - Set **Belongs To**: Choose where the form will attach (Client Document Manager, Patient Document Manager, or Clinical History).
    - Click the Form icon to edit and design the form.
    - Form Design Recommendations
        - Use a table with 100% width and 0 border size for mobile compatibility.
        - Inside the main table, use nested tables for alignment.
        - Keep one field name and input field per line for mobile-friendly layout.
        - Use Mailmerge button to insert variables (e.g., @Firstname, @AnimalName).
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        - **Example format**

Clinic Name / Logo

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☐ I hereby consent …
@Signature Inserted Here

Create Default Email Template

1. Navigate to: **Options -> Picklists Setup -> Diary -> Custom Email Templates**
2. Click **+** to create a new template.
3. Enter template name and write default message.
4. Insert **@DigitalFormsLink** to include the form link.
5. Save and exit.

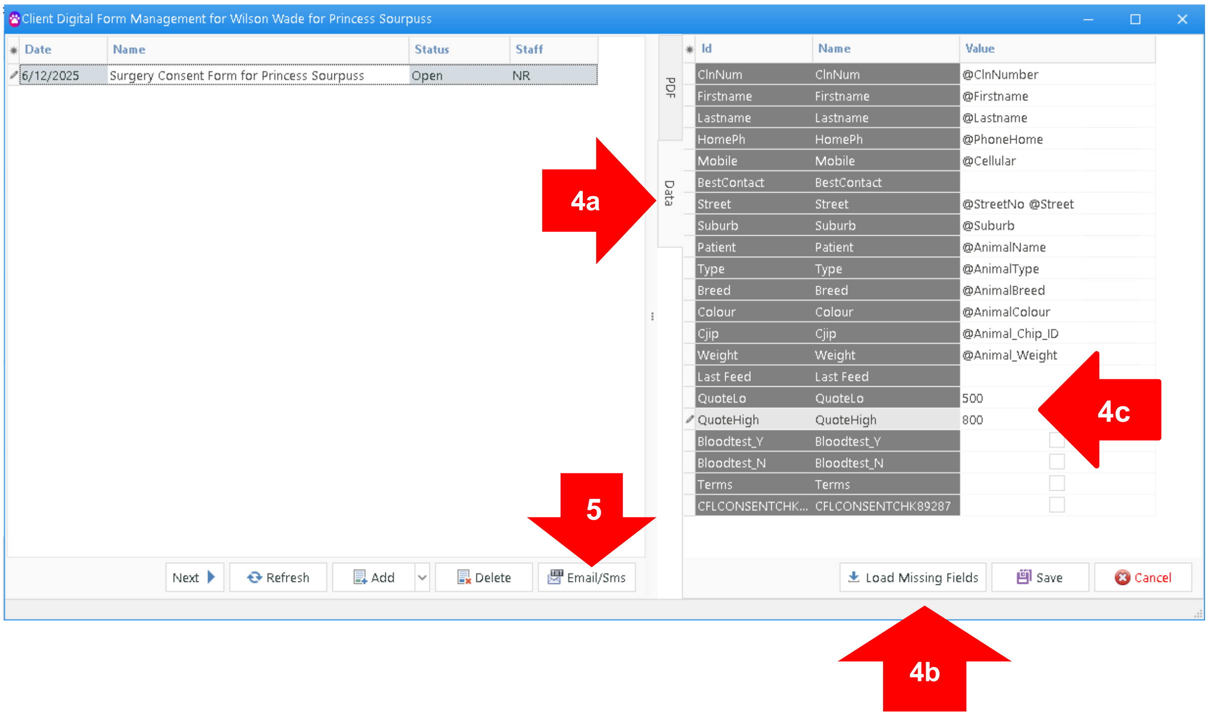
Using Digital Forms

Sending Digital Forms

1. **Right-click Appointment -> select Assign Form for E-Capture -> select Form**.
2. A blue "Digital Forms" icon will appear on appointment indicating form has been assigned but not filled / send back in yet.

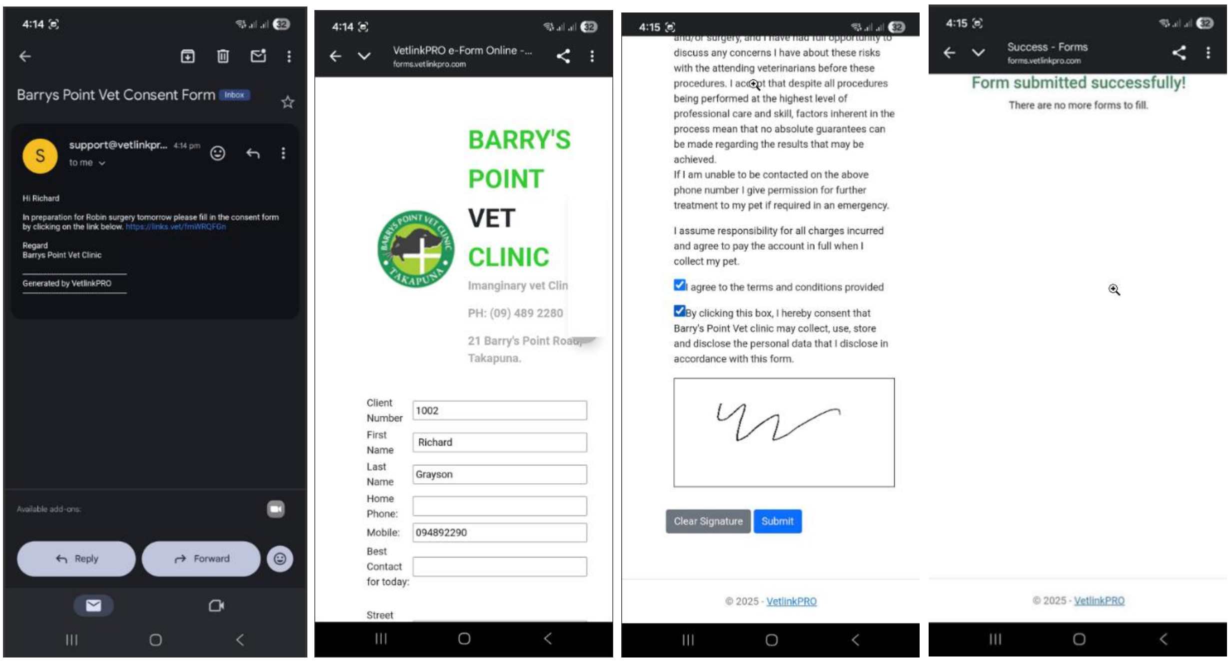
Note: Form will also now be available on eforms mobile app if required.

3. **Right-click Appointment -> Manage Digital Forms**.
4. To edit details (e.g., quote amounts)
   a. Select form and click **Data** tab
   b. Click **Load missing fields button**
   c. Update values and **Save**.
5. To email form click **Email/SMS-> Select template -> Edit message if needed -> Click Send.**



Digital Form Completion by Client

1. Client receives email/SMS with link.
2. They fill in the form, sign, and submit.



Receiving Completed Forms

1. Clinic will be notified a Digital Form has been received back by either;
   a. Digital Form icon on appointment turns orange
   b. Digital Form Notification icon at top of VetlinkPro will have red dot that starts blinking.

2. Staff can then review form to make sure its filled in correctly. To do this either;
   a. Click Digital Form Notification icon
   b. Right-click Appointment → Manage Forms.
3. If Digital form not filled in correctly
   a. Click **Resend**
   b. Edit values before resending if need

c. Click Email/SMS to resend
Note: If you select Resend from Digital Form Management screen, you still need to go to appointment -> manage forms and email / SMS form from there.

4. Once Digital Form completed correctly Click **Reviewed** button in Digital Form Management screen to mark as reviewed (icon turns **green**).
5. The completed Digital Form is saved on appointment and then moved to Clinical History, Patient, or Client record once visit starts (Depending on Belongs To configuration option)