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
     - o Use a table with 100% width and 0 border size for mobile compatibility.
     - o Inside the main table, use nested tables for alignment.
     - o Keep one field name and input field per line for mobile-friendly layout.
     - o Use Mailmerge button to insert variables (e.g., @Firstname, @AnimalName).
     - o 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.
     - o Checkboxes
       1. Non-mandatory
       2. mandatory using Mandatory_Check_Box.
       3. Privacy consent: Use Privacy Consent Checkbox.
     - o Signature: Insert via mailmerge option.
     - o **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

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.

Grayson Richard
Robin (Cat, Domestic Long Hair)
Consultation

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.**
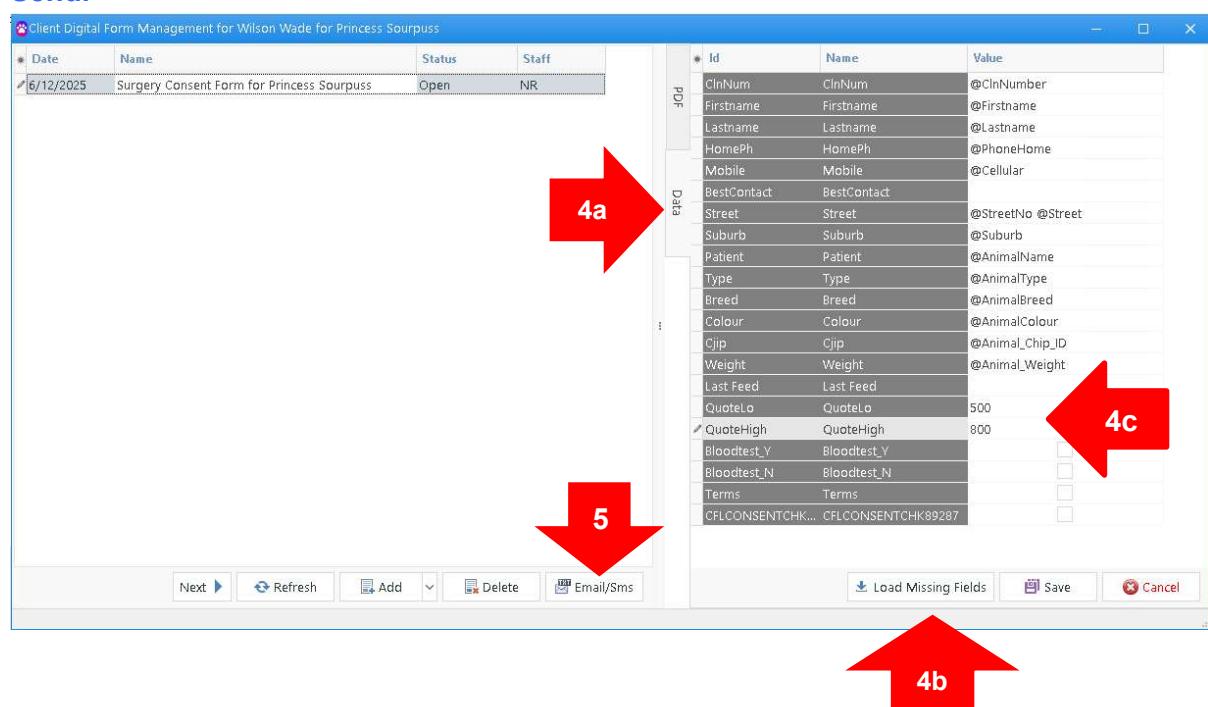
Digital Form Completion by Client

1. Client receives email/SMS with link.
2. They fill in the form, sign, and submit.
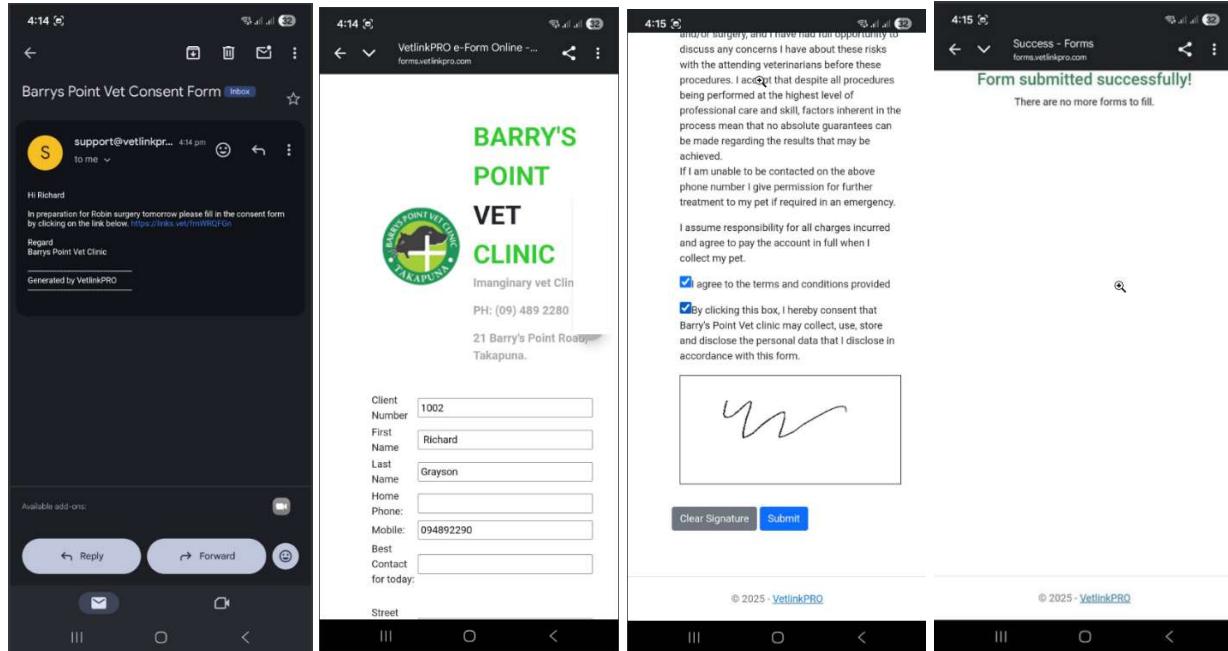
Receiving Completed Forms
1. Clinic will be notified a Digital Form has been received back by either;
   a. Digital Form icon on appointment turns orange
   b. Digital Form Notification icon at top of VetlinkPro will have red dot that starts blinking.
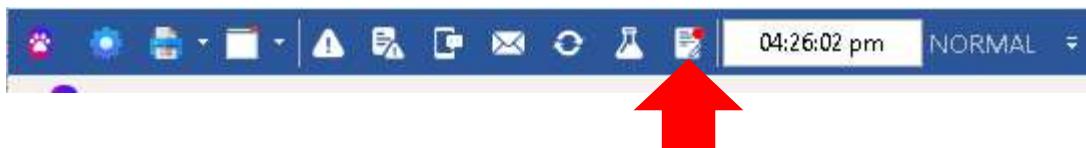
2. Staff can then review form to make sure its filled in correctly. To do this either;
   a. Click Digital Form Notification icon
   b. Right-click Appointment → Manage Forms.
3. If Digital form not filled in correctly
   a. Click **Resend**
   b. Edit values before resending if need

    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)