

SMS Mobile Intake Forms

Spring 2021

You can send mobile intake forms via SMS text from inside NextLevel if the client has given permission “ok to text” and has a valid mobile number inside their file.

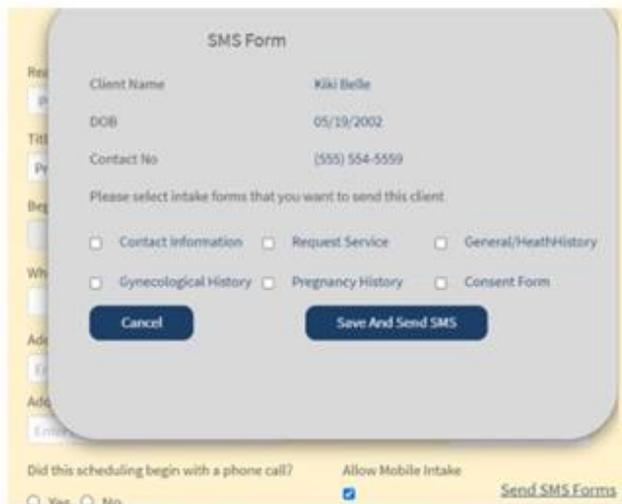
Completed mobile forms will *automatically be applied to the OPEN Case* inside the client file when returned. There can only be one (1) Open Case at a time in a client file. Before sending mobile forms make sure the Case you want the forms applied to is set to Open status.

New Case: If a previous client with an old case is returning for *new* services and you are creating a *new* case, be sure to set the *previous/old* case to “Closed” status first. Then, create the new case and send mobile forms. This will ensure the data entered in the old case remains in the case history and any new data collected with mobile forms will be applied to the current “Open” Case only.

Same Case: Any forms you send the client for an existing case, will automatically update the data inside the case when the forms are returned.

STEPS: From the Appointment Form> Create the appointment and select the forms you want to send.

Click the **Save and Send SMS** button to send forms. The forms have been sent.



The client will receive a notification text alerting to complete the forms.

The Authentication will require the Last Name, Date of Birth and the Access Code included in the text to open the forms.

Authentication

	Last Name
	DOB format : MM/dd/yyyy
	Access code

Login

Once the client fills out and returns the forms, the completed forms auto-populates directly into the file and current case.

Forms Status: You will be able to see the status of the mobile forms by the icon on the Home Screen, next to the name of client. The clipboard icon indicates the forms were sent and the file icon indicates the forms were returned. If you hover over the icon, it will indicate the status.



In addition, you can **check the status**, **re-send forms** and **clear the form requests** by clicking on the Client Tab and selecting Mobile Intake List.

