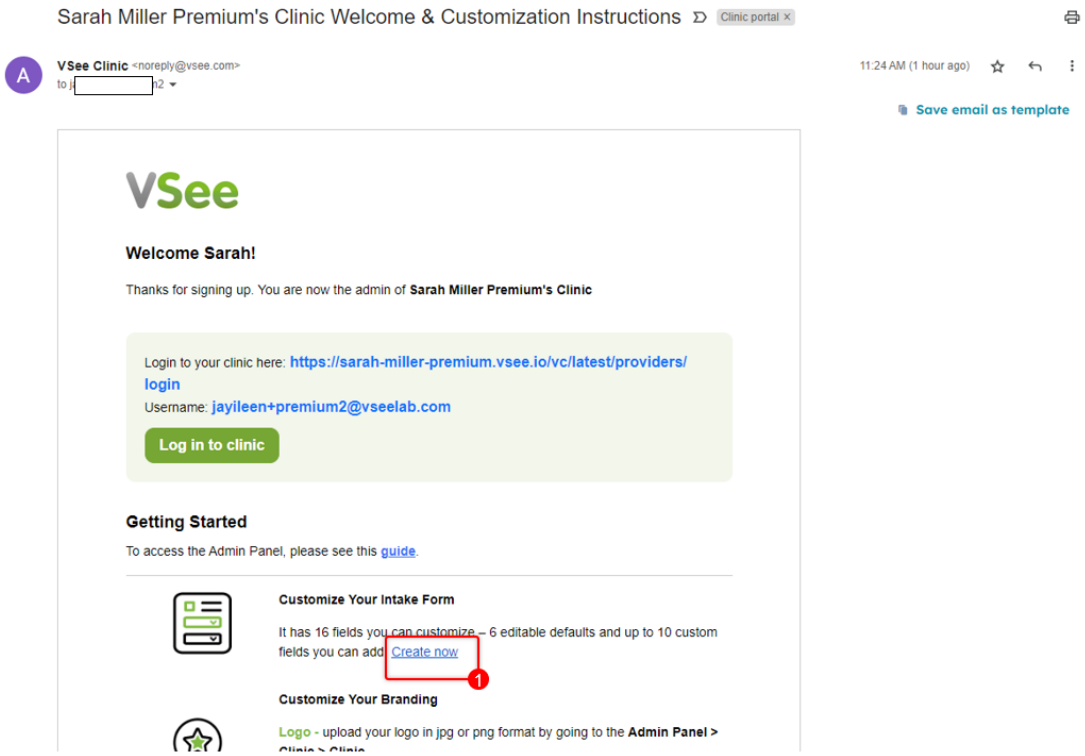
How to Customize Your Intake Form

Jay-Ileen (Ai) - 2023-04-14 - Essential Articles to Help You Get Started

After successfully creating your account, you will receive a Welcome email with Customization instructions.

1. Under the Customize Your Intake Form section of Getting Started, click **Create now**.

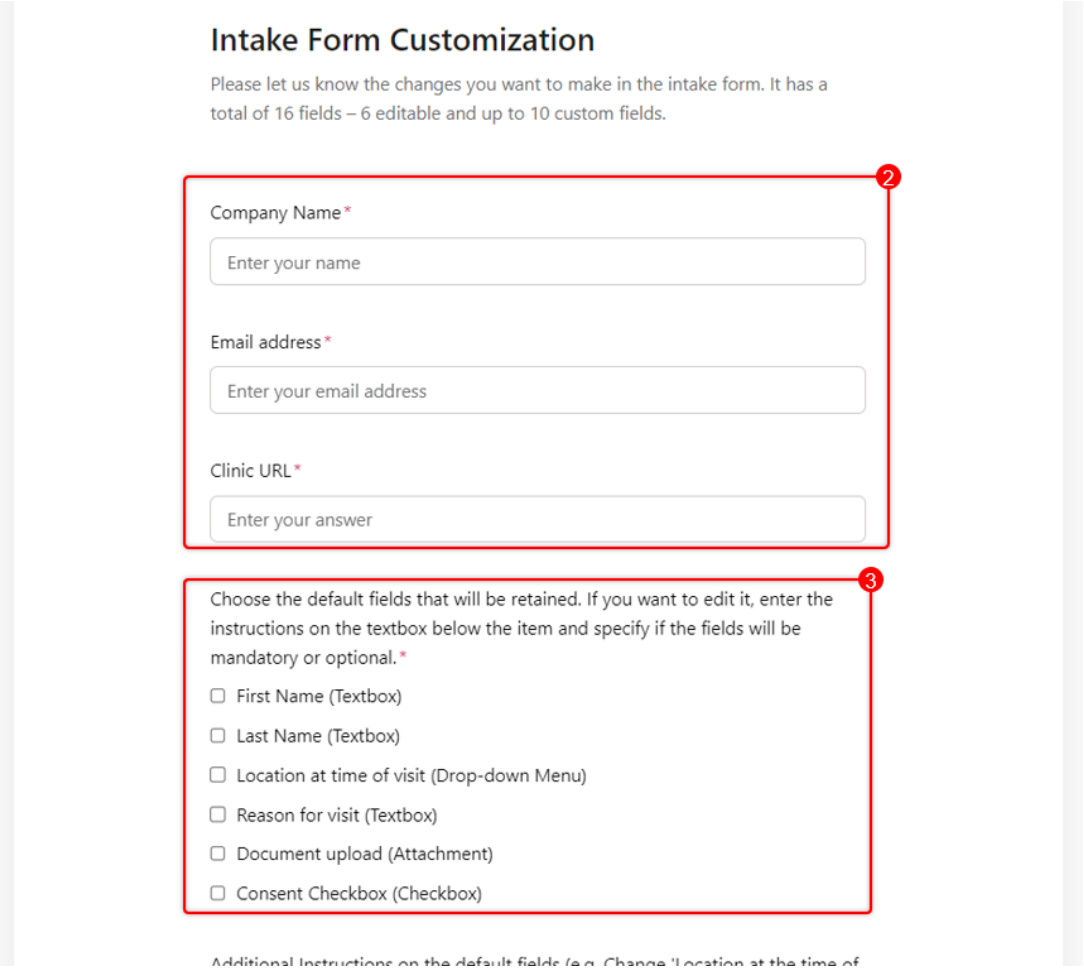


A new tab will open and you will see the Intake Form Customization field.

2. Input your **Company Name**, **email address**, and **Clinic URL**.

3. Click on the checkboxes for the default fields that will be retained in the intake form of your clinic.

The default fields are **First Name**, **Last Name**, **Location at time of visit (with Drop-down Menu)**, **Reason for visit**, **Document upload (Attachment)**, and **Consent Checkbox**.



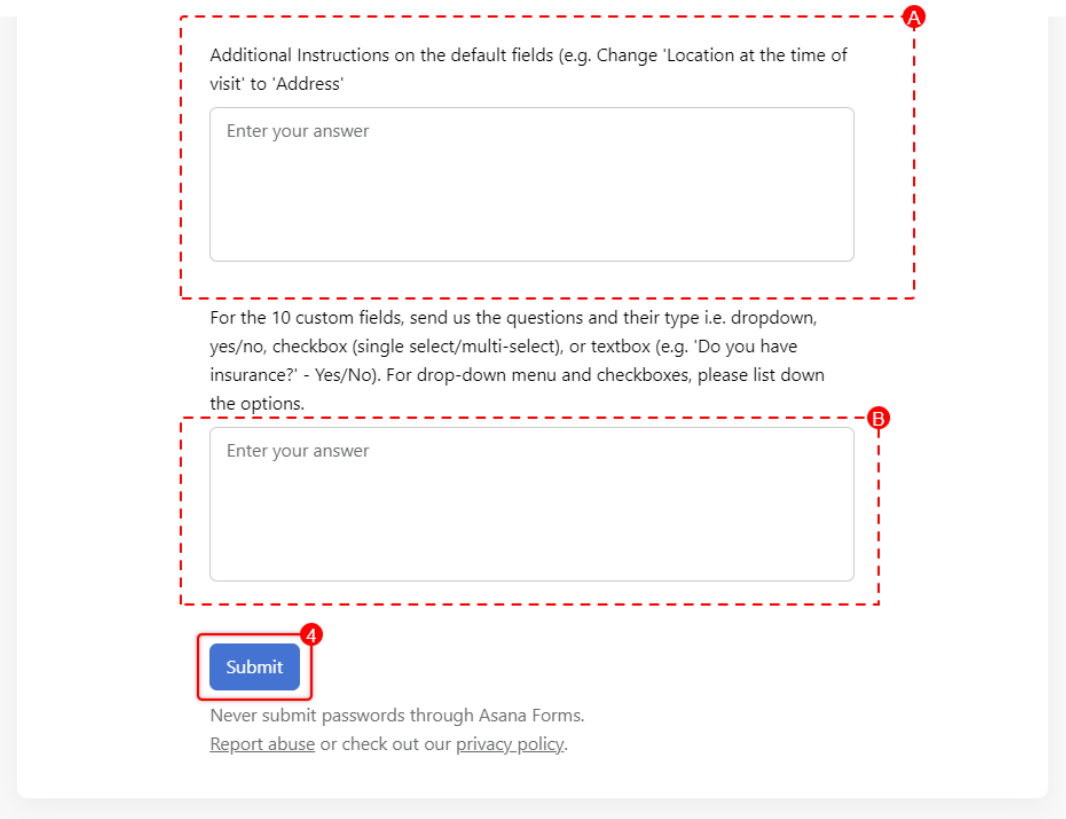
If you want to edit the default fields, enter the instructions in the textbox below the item and specify if the fields will be mandatory or optional.

A. Input additional instructions on the default fields (e.g. Change the “Location at the time of visit” to “Address”).

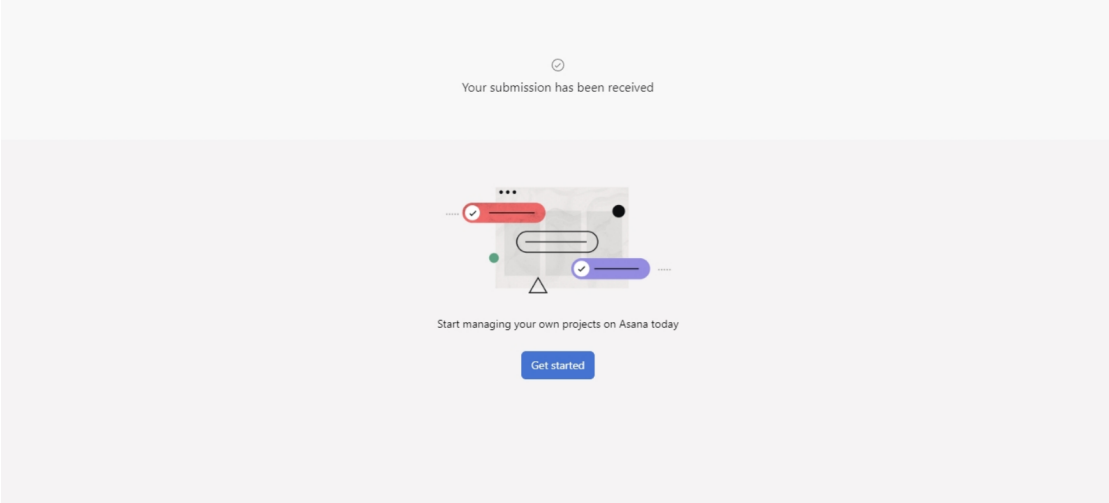
B. For the 10 custom fields, input the questions and their type i.e. dropdown, yes/no, checkbox (single select/multi-select), or textbox (e.g. ‘Do you have insurance?’ - Yes/No).

For the drop-down menu and checkboxes, input the options as well.

4. Click on **Submit**.



Your submission has been received. Please wait for an email from our VSee Admin team for updates on your customization request.



If you have any questions, please contact us at help@vsee.com

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