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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**.

Sarah Miller Premium's Clinic	Welcome & Customization Instructions D	linic portal ×		₽
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VSee				
Welcome Sarah!				
Thanks for signing up. You are no	w the admin of Sarah Miller Premium's Clinic			
Login to your clinic here: http: login Usemame: jaylleen+premit Log in to clinic	s://sarah-miller-premium.vsee.io/vc/latest/providers/ um2@vseelab.com			
Getting Started To access the Admin Panel, pleas	e see this <u>guide</u> .			
It has 1 fields y	nize Your Intake Form 6 fields you can customize - 6 editable defaults and up to 10 custom ou can add Create now			
Logo -	upload your logo in jpg or png format by going to the Admin Panel >			

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.

total of 16 fields – 6 editable and up to 10 custom fields. Company Name* Enter your name Email address* Enter your email address Clinic URL* Enter your answer Choose the default fields that will be retained. If you want to edit it, enter the instructions on the textbox below the item and specify if the fields will be mandatory or optional.* First Name (Textbox) Location at time of visit (Drop-down Menu) Reason for visit (Textbox) Document unload (Attachment)	ompany Name * Enter your name mail address * Enter your email address inic URL *
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Reason for visit (Textbox)	Last Name (Textbox)
	Location at time of visit (Drop-down Menu)
Document unload (Attachment)	Reason for visit (Textbox)
 Document upload (Attachment) 	1

Additional Instructions on the default fields (e.g. Change 'Location at the time of

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").

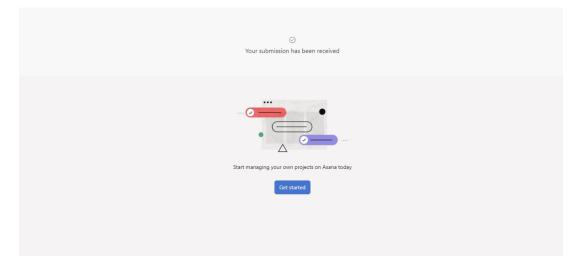
B. For the 10 custom fields, input the questions and their type i.e. dropdown, yes/no, checkbox (single select/multi-select), or textbox (e.g. 'Do you have insurance?' - Yes/No).

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

4. Click on **Submit**.

Enter your answer	
For the 10 custom fields, send us the questions and their type i.e. dr yes/no, checkbox (single select/multi-select), or textbox (e.g. 'Do you insurance?' - Yes/No). For drop-down menu and checkboxes, please the options.	you have

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

Last updated on: 04 April 2023

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