smarter drafter PRO
by tensis

Intake Forms

Module 17 – Intake Forms

Version 1.0

Table of Contents

1. Intake Forms 2
1.1 What is an Intake Form? 2
1.2 When to use an Intake Form 2
1.3 How does an Intake Form work? 2
2. Set-Up an Intake Form 3
2.1 Assigning/Enabling an Intake Form 3
2.1 Switching Between the Intake Form and the Parent Form 4
2.2 Intake Form Branding Settings 5
2.3 Set Fields to Share Data on the Parent Form 5
3. Editing an Intake Form 6
3.1 What Edits can be made to an Intake Form? 6
3.2 Hide All Slide Switch 6
3.3 Undo Edits 7
3.4 How do Edits to a Parent Form Transfer to an Intake Form? 7
4. Check the Intake Form Set-Up 8
4.1 Check the Intake Form Customisations 8
4.2 Check the Intake Form Email Templates 8
4.3 Check Branding Settings and Intake Form Process 9
5. Run the Intake Form 13
5.1 Sender: Issue the Intake Form 13
5.2 Recipient: Complete the Questionnaire 15
5.3 Sender: Generate the Document 16
6. Embed Link to Intake Forms on Website 16

1. Intake Forms

1.1 What is an Intake Form?

An Intake Form is a mirror version of a main (parent) form that is intended to be sent to someone else for completion. While the parent form is in the Smarter Drafter document library and can be generated by form fillers, an Intake Form can be sent outside of the organisation, to someone without a Smarter Drafter license, where they can answer the questionnaire and submit the form back to the sender for completion.

1.2 When to use an Intake Form

An Intake Form is useful where the required data needs to be extracted from someone else, particularly if there is a large amount of information to capture. Rather than having a consultation or completing a manual form or notes, the recipient can answer the questions online and submit the completed Intake Form back to the sender, providing accurate spelling of names, dates etc.

Intake Forms are commonly used for:

- **New client details**: Contact information and personal details
- **Estate planning details**: Details of several parties, correct spelling, addresses and dates
- **Family law details**: Extensive relationship information, family history and asset/liability details
- **Matter details**: Brief description of matter, key dates and relevant parties

1.3 How does an Intake Form work?

A link is sent to the recipient, giving them access to fill-in the questionnaire and submit their responses back to the sender.

When the recipient has submitted their responses, the sender is notified and they can then pick up the Intake Form and continue the submission through to document generation.

When an Intake Form is created, it is initially a replica of the parent form. The builder can then adjust the Intake Form version to hide questions that the recipient doesn't need to see/answer. When the recipient submits the Intake Form back, the sender then accesses the submission and any hidden questions will now be revealed and can be answered to finalise the questionnaire and submit the form for document generation without having to rekey any of the information.

NOTE: The recipient will not be able to generate the document or access the template connected to the form.

---

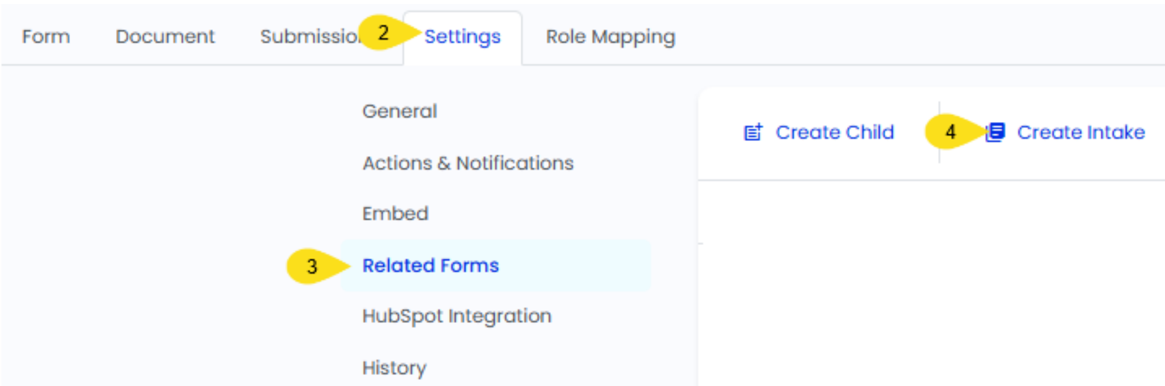
2. Set-Up an Intake Form

An Intake Form is not an independent, stand-alone form – rather, it is an existing form that has had an Intake Form assigned/enabled to be used.

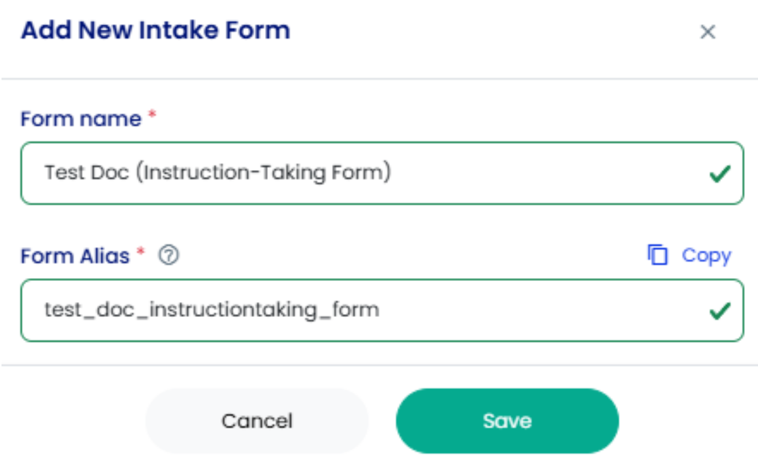
2.1 Assigning/Enabling an Intake Form

To assign/enable an Intake Form:

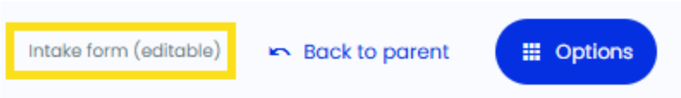
1. Open the published version of the parent form.
2. Go to **Settings**.
3. Click **Related Forms**.
4. Click **Create Intake**.



5. The New Intake Form pop-up will open.



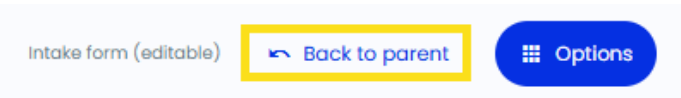
6. Give the Intake Form a **name** and form **alias**.
Check your organisation's naming conventions for Intake Forms. We recommend using the exact same document name so that there's no confusion to the pairing of the parent form to its Intake Form, and then adding a standard suffix, e.g. (Instruction-Taking Form) or (Intake Form).
7. Click **Save**.
8. The Intake Form will now open. You can identify the Intake Form by the version label.



NOTE: An Intake Form immediately inherits the settings of the parent form, e.g. if the parent is public, so is the intake; when the parent gets published, so does the intake etc.

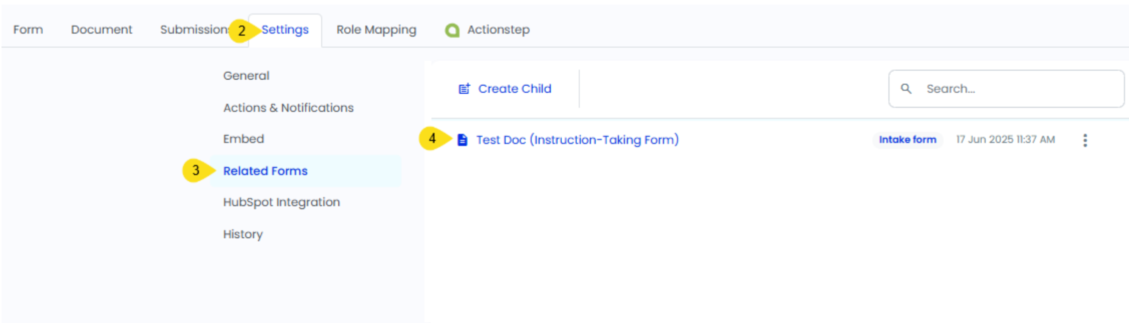
2.1 Switching Between the Intake Form and the Parent Form

To switch from the Intake Form back to the parent form, click **Back to parent**.



To switch from the parent form to the Intake Form:

1. Open the published version of the parent form.
2. Go to **Settings**.
3. Click **Related Forms**.
4. Navigate to the relevant folder/subfolder and click on the **Intake Form**.



2.2 Intake Form Branding Settings

As the recipient of an Intake Form is not a licensed user of Smarter Drafter, they will be accessing an online web form to complete the questionnaire. You can apply your organisation's custom colours and branding to the Intake Form settings so that the questionnaire appears on a customised web form.

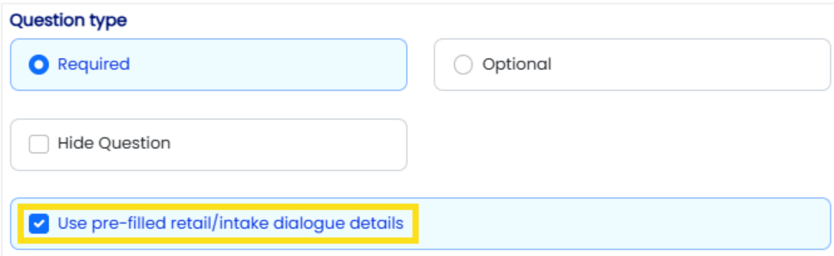
Intake Form settings are universal so these settings will be applied to all Intake Forms in your library. Adjustments can't be made to individual Intake Forms.

NOTE: Branding settings are managed by your account administrator. Contact your account administrator if the Intake Form settings haven't been set-up or require changes.

2.3 Set Fields to Share Data on the Parent Form

During the Intake Form sending, filling and submission process, the contact details of the recipient will be required in a few different places. To save rekeying this information, the relevant fields can be set to share the first answer provided and automatically insert it where required and save rekeying.

To enable this, when you are creating the relevant fields on the parent form, tick the checkbox to use the pre-filled details. It is recommended to apply this to the fields for name, address, email and phone.



3. Editing an Intake Form

3.1 What Edits can be made to an Intake Form?

Editing an Intake Form is limited to:

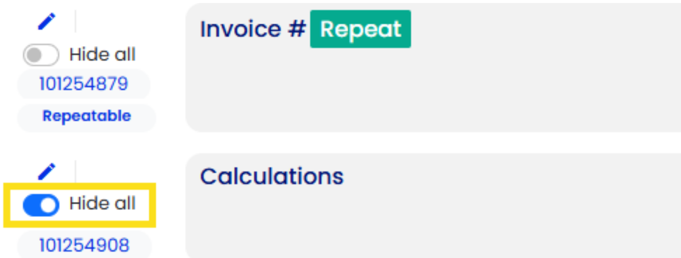
1. Changing the label of a section.
2. Changing the label of a field.
3. Hiding whole sections.
4. Setting individual fields to 'hidden'.
5. Changing mandatory/optional/read only settings.
6. Setting or changing a default value.
7. Adding supporting text.

IMPORTANT NOTES

- If any element of a question has been changed in the Intake Form, that question disconnects from future changes made to that specific question in the parent form. This relates to every question and every type of change.
- Changes are not apparent in the Intake Form so when changes are published in the parent form, a builder should check the Intake Form as the updates from the parent form may not have transferred. That may be the required outcome, but it's important to check where it's a change that is required in the Intake Form as well.
- Before changes are made to an Intake Form, possible impact on logic and conditional rules should be carefully considered and checked.

3.2 Hide All Slide Switch

Intake Forms can be adjusted to hide sections from the recipient so that they don't see unnecessary parts of the questionnaire. Each section of the Intake Form will have a **Hide All** slide switch to toggle the hide all feature on/off. This feature will hide the whole section when the questionnaire is answered by the recipient, but these sections will be revealed when the sender is finalising the submission. In the example below, you may want the recipient to provide you with details of the invoices they issued, but they don't need to see the calculations that you require for the sums in your letter/document.

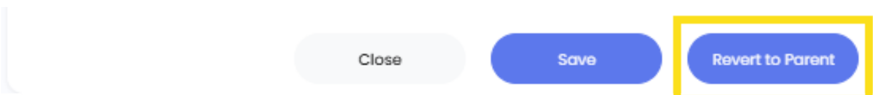


When the hide all switch is enabled, the questions will be shaded in orange to indicate that they will be hidden from the recipient.

3.3 Undo Edits

If edits have been made to the Intake Form that need to be undone, there is an option to revert back to the parent settings. This can be done for changes made to an individual field and/or a whole section.

The properties of fields and sections in the Intake Form will have a **Revert to Parent** button next to the Save button.



3.4 How do Edits to a Parent Form Transfer to an Intake Form?

Edits to a parent form will be replicated in all related Intake Forms EXCEPT if the impacted fields have been altered in the Intake Form. The Intake Form should be checked carefully to ensure any required updates haven't been incorrectly excluded.

When a parent form is published, the edits are transferred to the Intake Forms but while a parent form is in draft, the Intake Form won't be altered.

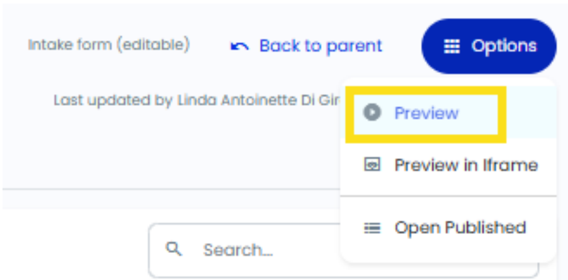
4. Check the Intake Form Set-Up

4.1 Check the Intake Form Customisations

Once an intake form has been assigned, it's important to test it to ensure your alterations and hidden sections behave as expected.

To preview the form:

1. Click **the waffle button**.
2. Click **Preview.**
3. Fill in the form.



As you can't submit Intake Forms, you won't see the submit button when you reach the end of the questionnaire. Once you have finished previewing and testing the Intake Form questionnaire, close the browser tab.

NOTE: Previewing the Intake Form runs in the builder view and is designed to test the questionnaire so it won't display custom branding or run through the full process.

4.2 Check the Intake Form Email Templates

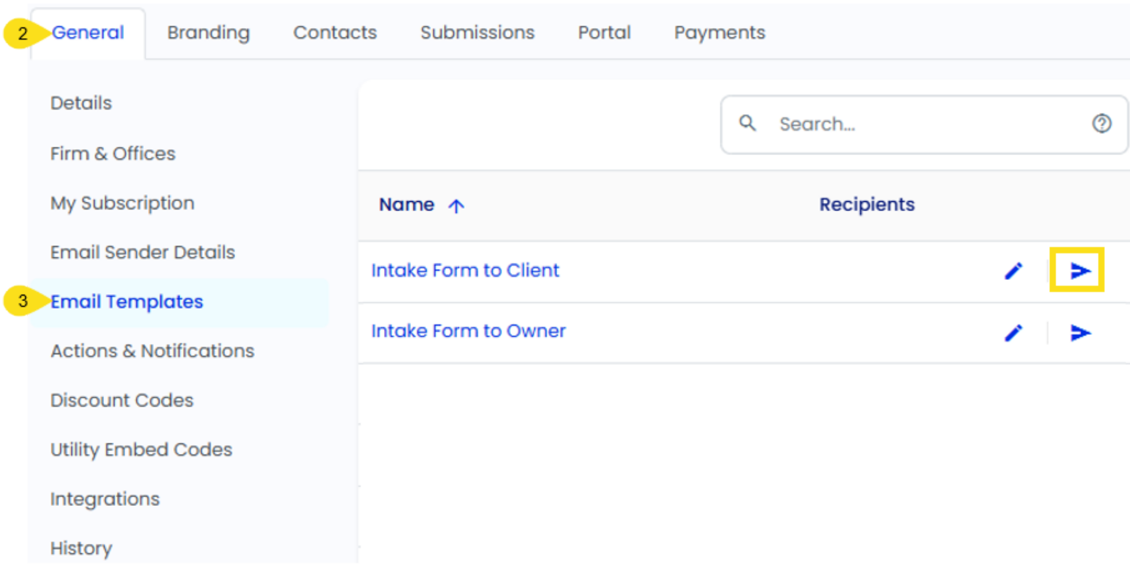
The organisation can create default email templates to use for the processing of Intake Forms:

1. **Intake Form to Client**: The cover email that is used to send the Intake Form link to the client.
2. **Intake Form to Owner**: The cover email that is used when the recipient submits the Intake Form back.

NOTE: Email templates are managed by your account administrator. Contact your account administrator if the email templates haven't been set-up or require changes.

To view the email templates:

1. Go to **Account**.
2. Click on **General**.
3. Click on **Email Templates**.
4. Click on the send **arrow icon** to send a test email to yourself and preview the contents.

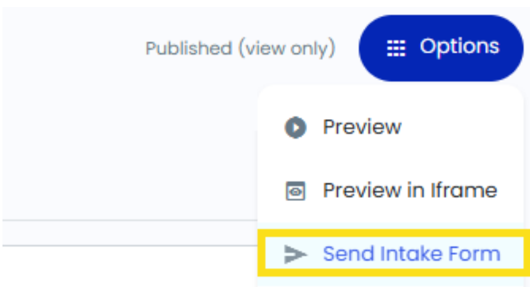


4.3 Check Branding Settings and Intake Form Process

Send the intake form to yourself to check the full process, behaviour and branding settings.

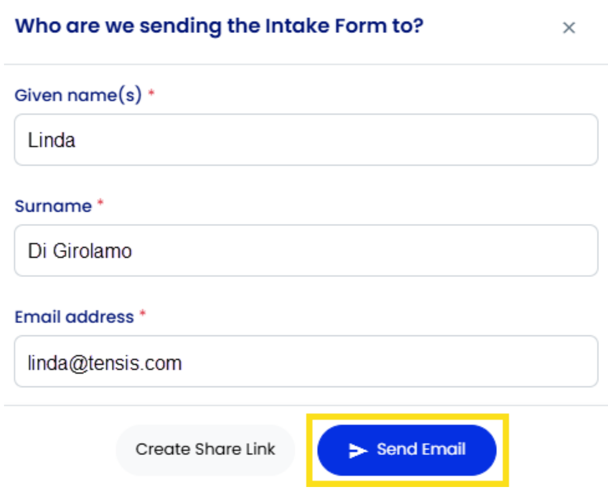
To send yourself the Intake Form:

1. Open the published version of the parent form.
2. Click the **waffle button**.
3. Click **Send Intake Form**.

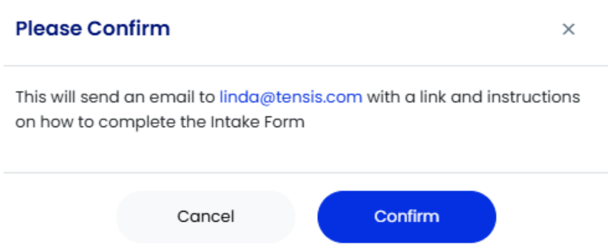


NOTE: This is not available on the draft version of the parent form.

5. Enter your own details as the recipient.

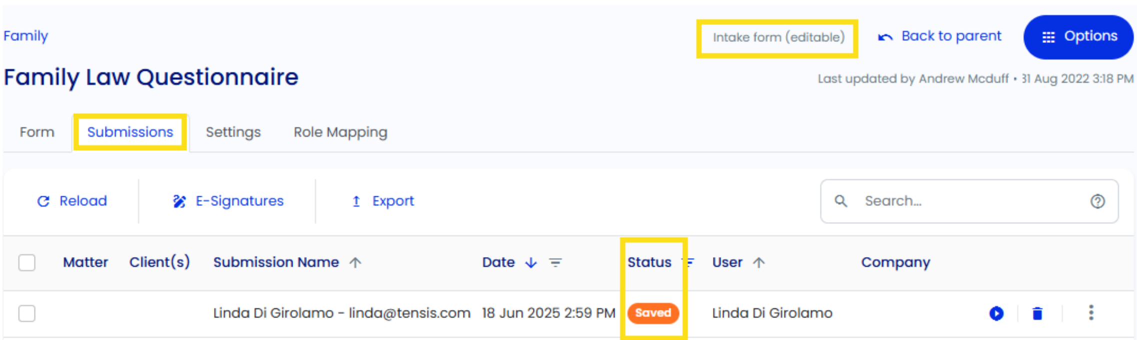


6. Click **Send Email**.

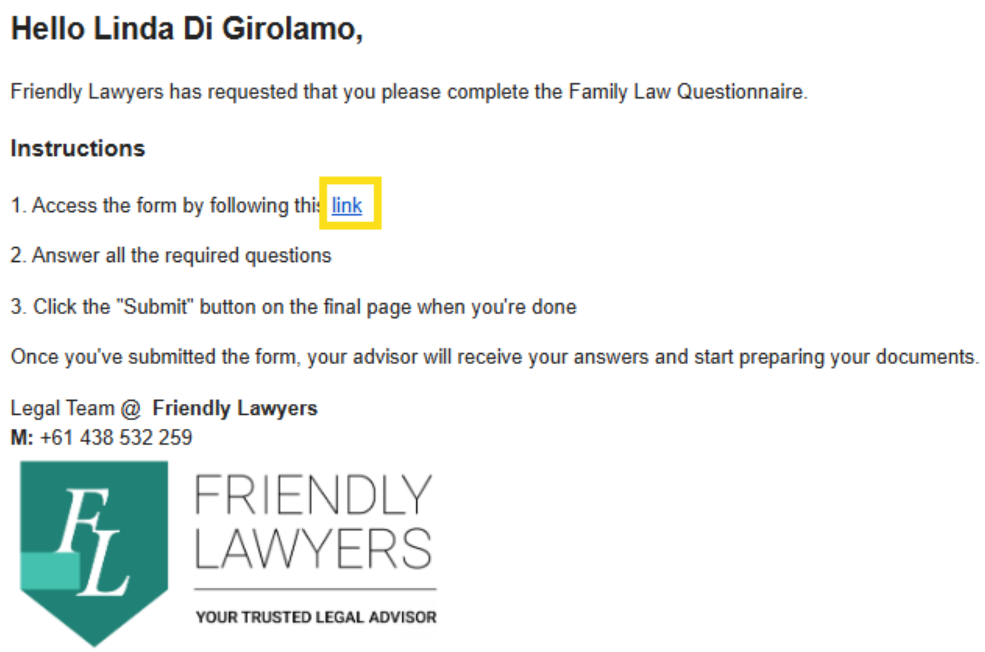


7. Click **Confirm**.

8. The Intake Form will appear in the submissions list with the status **Saved**.



9. You will receive an email with a link to access the Intake Form. Open the email and click on the link.



Hello Linda Di Girolamo,

Friendly Lawyers has requested that you please complete the Family Law Questionnaire.

Instructions

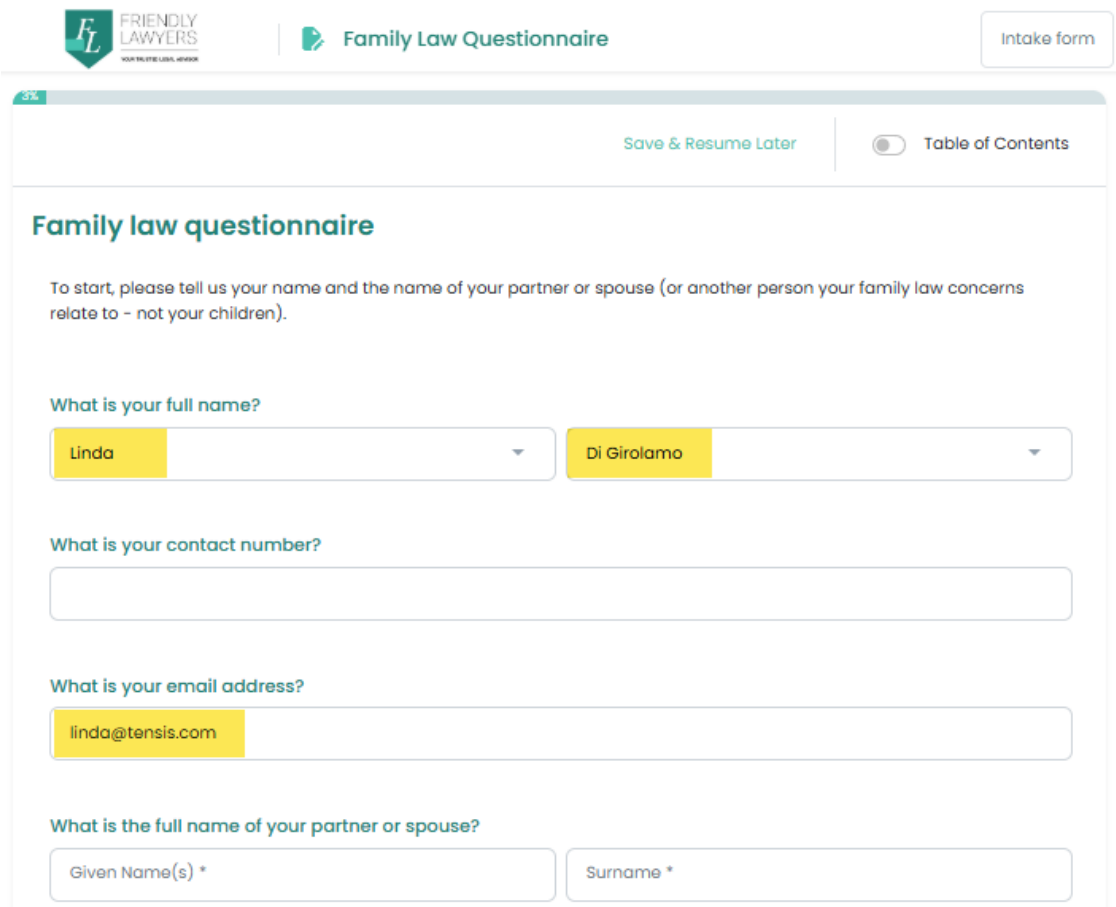
1. Access the form by following this link
2. Answer all the required questions
3. Click the "Submit" button on the final page when you're done

Once you've submitted the form, your advisor will receive your answers and start preparing your documents.

Legal Team @ **Friendly Lawyers**
M: +61 438 532 259

FRIENDLY LAWYERS
YOUR TRUSTED LEGAL ADVISOR

10. The Intake Form will open and any pre-known information will have populated into the form (as per the field settings assigned in 2.3).



Family Law Questionnaire

Intake form

Save & Resume Later

Table of Contents

Family law questionnaire

To start, please tell us your name and the name of your partner or spouse (or another person your family law concerns relate to - not your children).

What is your full name?

Linda | Di Girolamo

What is your contact number?

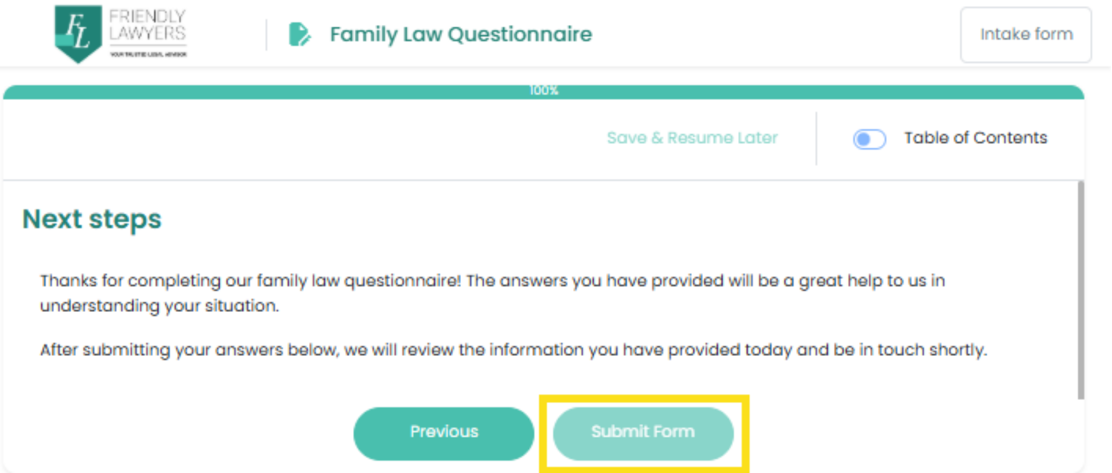
What is your email address?

linda@tensis.com

What is the full name of your partner or spouse?

Given Name(s) * | Surname *

11. Complete the questionnaire and click **Submit Form**.



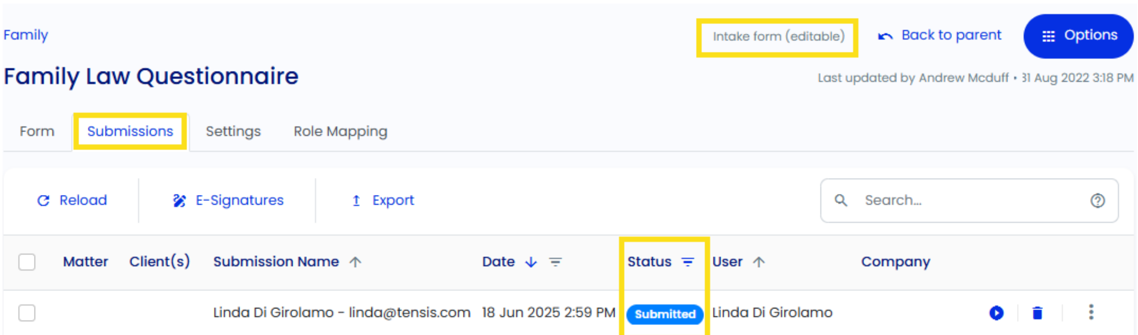
12. The sender will receive an email notification when the Intake Form has been submitted.

Hello,

The form **Family Law Questionnaire** has been submitted by **Linda Di Girolamo** (linda@tensis.com). You can access and complete the submission through the **Submissions Page**.

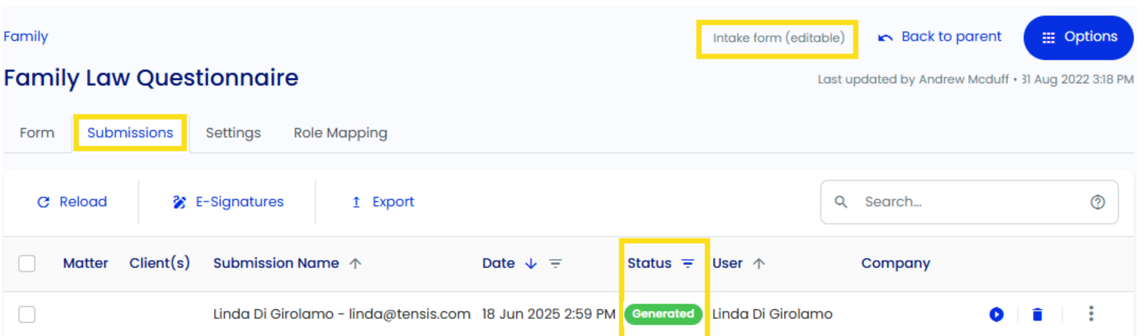
Reference number: cb0a7e31-a67f-9a6a-7e73-c5cb4341d4cb

13. The status of the Intake Form will be updated in the submissions list to show **Submitted**.



14. Click the resume arrow button to continue the submission and generate the document.

15. The status of the Intake Form will be updated in the submissions list to show **Generated**.

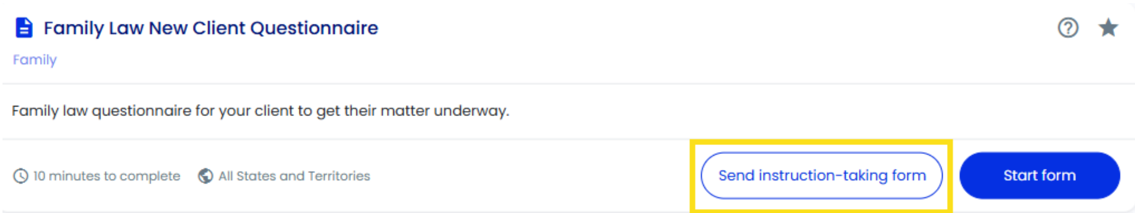


5. Run the Intake Form

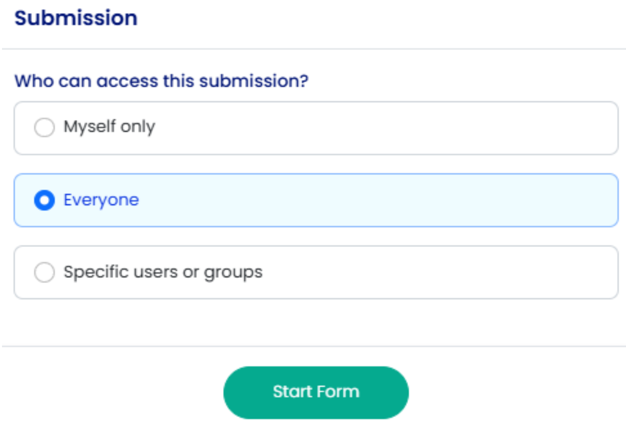
5.1 Sender: Issue the Intake Form

To send an Intake Form:

1. Locate the form in the Smarter Drafter form library and click **Send instruction-taking form**.

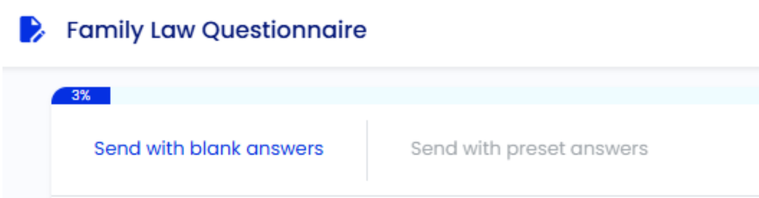


2. Set access and click **Start Form**.



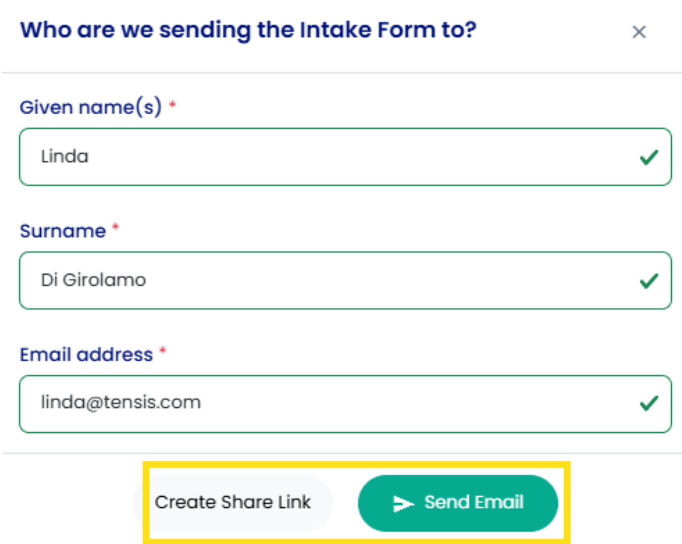
3. The form will open and display options to:

- **Send with blank answers**: Send an empty form
  >> This is the default and most common option
- **Send with preset answers**: Sender can prefill some information, then send
  >> This option will only be enabled when the sender enters some data



Either click **Send with blank answers** or prefill the required data and click **Send with preset answers**.

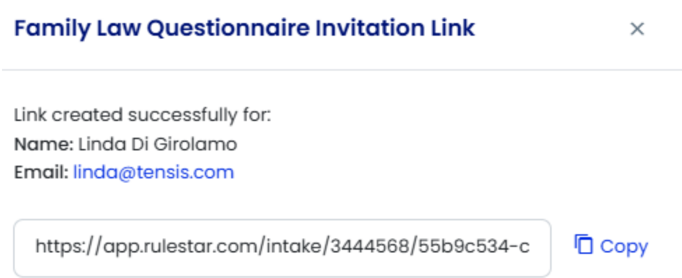
4. The recipient pop-up will open. Enter the recipient's details.



There are 2 ways to send the Intake Form:

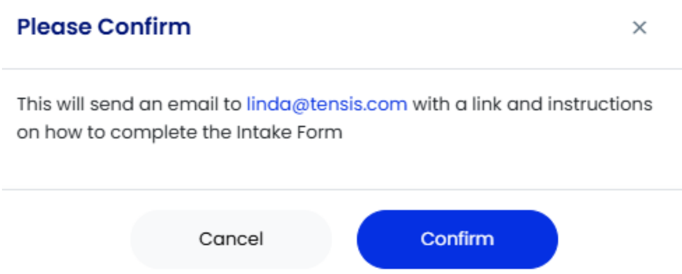
- Create Share Link: A link will be created for you to paste into your own custom email and send
- Send Email: The default email will be used

5. To send using a share link:
    - Click on the Create Share Link button.
    - A pop-up will open, displaying the link:

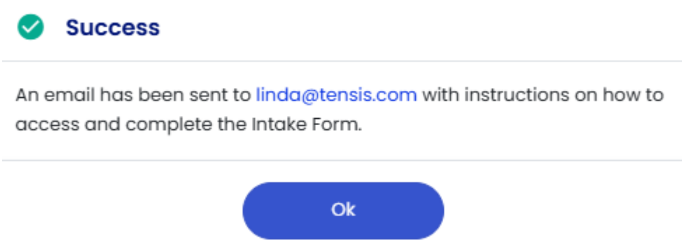


    - Click Copy.
    - Prepare your own custom/personalised email and paste in the link.
    - Send to the recipient.

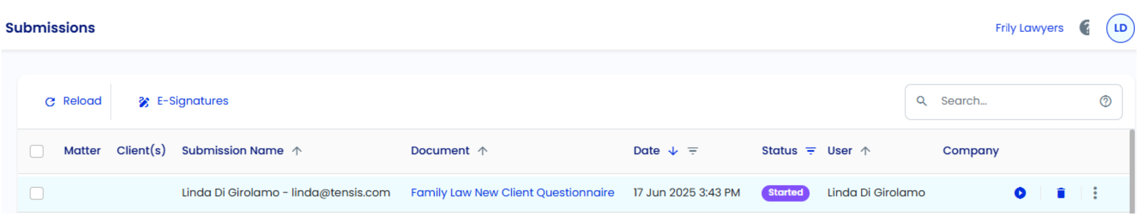
6. To send using the default email template:
   - Click the **Send Email** button.
   - A pop-up will open displaying the recipient's details:



   - Click **Confirm**.
   - The email will be sent immediately and a confirmation message will be displayed:



7. The sent Intake Form will appear in the submissions list and the status will be updated as the Intake Form is processed by the recipient and submitted back to the sender.



5.2 Recipient: Complete the Questionnaire

The recipient will receive either the custom or default email from the sender containing the link.

NOTE: The recipient can share the link if someone else needs to complete any questions. Once the recipient has submitted the Intake Form, the link will be disabled.

The process will continue as above.

NOTE: The recipient doesn't have to complete the form in a single sitting - they can save and resume the form as many times as they need.

5.3 Sender: Generate the Document

The sender will receive an email notification when the Intake Form has been submitted.

Locate the Intake Form in the submissions list to resume the form and generate as usual.

6. Embed Link to Intake Forms on Website

Customers can add links to their website so that their clients can access Intake Forms and submit them directly from the customer's website.

Our forms produce a code that the customer needs to embed in their website to enable this function. We assist in providing the code (see the Embed Links to Intake Forms on Website guide) but we don't get involved with the website. Customers will need to speak with their IT support team for the website adjustments.

NOTE: Embedding forms on the organisation’s website is managed by your account administrator and/or IT department. Contact your account administrator if the Intake Form is to be embedded on the website.
