



## Training Series

“Accessing Interactive Form Entry”

# Overview:

- Whenever a patient fills out and submits an interactive form through your website, a notification will go out to the email address you designate.
- Once you receive a notification there are two ways to access the form entry:
  - Login to our secure database to access that entry directly through the email notification.
  - Access the interactive form entries directly by logging into the database.

# Accessing forms through email notification

- An email notification will be sent telling you the type of form that has been submitted. For example “A New Appointment Request has been created”. Within the email you will see a link titled “Open/Edit Entry”.
- Click on this link to go to “log in” screen.

# Sample – Notification

From:  iHealthspot Website Form [support@ihealthspot.com]  
To: IH Aman  
Cc:  
Subject: New Appointment Request

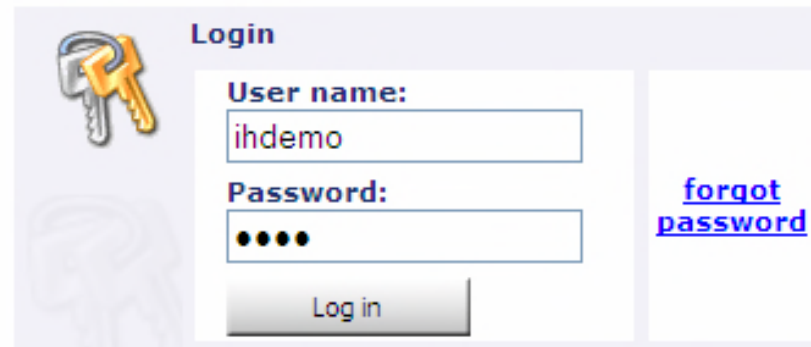
Sent: Thu 10/16/2008 10:49 AM

|   |               |  |
|---|---------------|--|
|  | Title         |  |
|   | Name          | copy_of_PB-SIL_Request_An_Appointment  |
|   | Action        | Submitted form   |
|   | Id            | 6609154  |
|   | Creation date | 10/16/2008 10:48:36  |
|   |               | <a href="#">Open form</a>   <a href="#">Open/edit entry</a>   <a href="#">Delete entry</a> |

A new Appointment Request Form has been created. To review it, please click the "**Open/edit entry**" above

# Login Screen

Once you clicked on the “Open/Edit Entry” it will take you to the login screen to iHealthSpot’s secure database (FormDesk).




The screenshot shows a login form with the following elements:

- Title:** Login
- Icon:** A key icon.
- User name:** A text input field containing "ihdemo".
- Password:** A text input field with five black dots representing a masked password.
- Buttons:** A "Log in" button.
- Link:** A blue, underlined link labeled "forgot password".

Type in the user name and password you were given at the time of your training. Then click on Login. The form will format and display on your screen.

# Entry Screen


**Search on entry Id**

 Here you can search on the [entry Id or order number](#) of a submitted form.  
These numbers are listed in the Summary of Result Entries and in the Notification messages.



Id  | Order number

Show submission info  Show unanswered questions

[To Forms Summary](#)









|   |               |                                       |
|---|---------------|---------------------------------------|
|  | Title         |                                       |
|   | Name          | copy_of_PB-SIL_Request_An_Appointment |
|   | Id            | 6609154                               |
|   | Creation date | 10/16/2008 10:48:36                   |

First Name: TEST  
Last Name: TEST  
Address: tETS  
Phone Number: 123465798  
E-mail:  
Birth Date:  
New Patient  
Select a Doctor: Select a Doctor  
Type of Appointment:

 Close  PDF

- You can print entry by clicking on the Print button
- You can save the entry to a PDF file by clicking on the PDF button.



entry Id or order number of a submitted form.  
 ie Summary of Result Entries and in the Notification messages.

Number:         

How many unanswered questions

|                                       |
|---------------------------------------|
| copy_of_PB-SIL_Request_An_Appointment |
| 6609154                               |
| 10/16/2008 10:48:36                   |








First Name: TEST  
 Last Name: TEST  
 Address: tETS  
 Phone Number: 123465798  
 E-mail:  
 Birth Date:  
 New Patient  
 Select a Doctor: Select a Doctor  
 Type of Appointment:

 Close  PDF

- You can update the entry by clicking on Edit button
- You can delete entry AFTER you have printed or saved the entry by clicking on the Delete button

Note: Please make sure you do not need the entry any more before you delete



entry id or order number of a submitted form.  
 re Summary of Result Entries and in the Notification messages.

per        

ow unanswered questions

|                                       |
|---------------------------------------|
| copy_of_PB-SIL_Request_An_Appointment |
| 6609154                               |
| 10/16/2008 10:48:36                   |

First Name: TEST  
 Last Name: TEST  
 Address: tETS  
 Phone Number: 123465798  
 E-mail:  
 Birth Date:  
 New Patient  
 Select a Doctor: Select a Doctor  
 pe of Appointment:

 Close  PDF



Once you are done with an entry you can close and log off or to see other entries you can click on "To Form Summary"

The screenshot shows a web application interface with a header bar containing navigation icons and a link labeled "To Forms Summary" enclosed in a red box. Below the header, there is a list of entries. The first entry is titled "-SIL\_Request\_An\_Appointment" and includes a timestamp "10:48:36". Below this, there are several lines of text: "TEST", "TEST", "tETS", and "123465798". Further down, the text "New Patient" and "Select a Doctor" is visible. At the bottom of the interface, there are two buttons: "Close" (with a red box around it) and "PDF".

When you clicked on “To Forms Summary” it should take you to your Form Summary page where it will show all the interactive forms that you have in your website.

The screenshot shows a 'Forms summary' page with a table of forms. A red box labeled '1' highlights the 'Name' column. Another red box labeled '2' highlights the 'Stored entries' column. A third red box labeled '3' highlights the 'Latest response' column. The table contains two rows of data. Below the table, it says 'Number of forms: 2'.

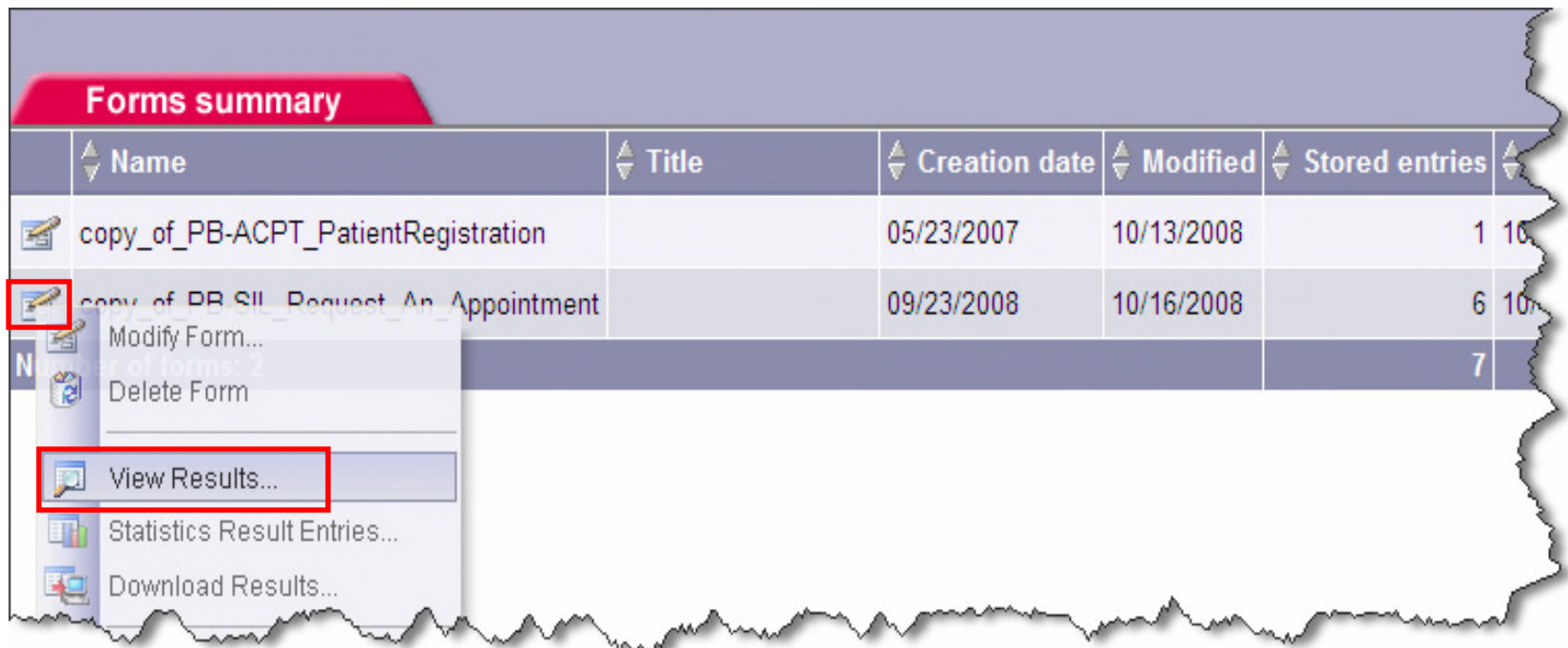
| Name                                  | Title | Creation date | Modified   | Stored entries | Latest response  |
|---------------------------------------|-------|---------------|------------|----------------|------------------|
| copy_of_PB-ACPT_PatientRegistration   |       | 05/23/2007    | 10/13/2008 | 1              | 10/09/2008 13:53 |
| copy_of_PB-SIL_Request_An_Appointment |       | 09/23/2008    | 10/16/2008 | 6              | 10/16/2008 10:52 |

Number of forms: 2

1. Here you can see the name of the forms
2. How many entries you have on each form
3. Date and time of the Latest response on each form

## To see all the entries on a specific form

Click on the Pencil icon and select View Result



The screenshot shows a 'Forms summary' table with the following data:

| Name                                  | Title | Creation date | Modified   | Stored entries |
|---------------------------------------|-------|---------------|------------|----------------|
| copy_of_PB-ACPT_PatientRegistration   |       | 05/23/2007    | 10/13/2008 | 1 10           |
| copy_of_PB_SIL_Request_An_Appointment |       | 09/23/2008    | 10/16/2008 | 6 10           |
| N of forms: 2                         |       |               |            | 7              |

A context menu is open over the second row, with the 'View Results...' option highlighted. The menu items are: Modify Form..., Delete Form, View Results..., Statistics Result Entries..., and Download Results....

This will list all the entries of that form

**Results**

Form: copy\_of\_PB-SIL\_Request\_An\_Appointment [View the map](#)

Filter:  No filter |  Filter on keyword  |  Advanced filter

|  | Id      | Submission date+time | First Name: | Last Name: | Address: | Phone Number: |
|--|---------|----------------------|-------------|------------|----------|---------------|
|  | 6609189 | 10/16/2008 10:52     | TEST        | tETST      | TEST     | 123456        |
|  | 6609154 | 10/16/2008 10:48     | TEST        | TEST       | tETS     | 123465798     |
|  | 6455448 | 09/24/2008 11:21     | TEST1       | TEST1      | TEST1    | 455464564654  |
|  | 6455425 | 09/24/2008 11:18     | TEST2       | TEST2      | TEST2    | 1235456       |
|  | 6455406 | 09/24/2008 11:17     | t           | t          | t        | 123457        |
|  | 6455170 | 09/24/2008 10:50     | 1           | 1          | 1        | 123           |

Now to view a specific entry

Click on the Pencil icon by an entry and click on Open Entry

The screenshot shows a web interface with a 'Results' header. Below the header, there is a search bar containing 'copy\_of\_PB-SIL\_Request\_An\_Appointment' and a 'View the map' link. A filter section shows 'No filter' selected. The main content is a table with the following data:

|  | Id      | Submission date+time | First Name: | Last Name: | Address: | Phone Number: | E-n |
|--|---------|----------------------|-------------|------------|----------|---------------|-----|
|  | 6609189 | 10/16/2008 10:52     | TEST        | tETST      | TEST     | 123456        |     |
|  | 6609154 | 10/16/2008 10:48     | TEST        | TEST       | tETS     | 123465798     |     |
|  | 6455448 | 09/24/2008 11:21     | TEST1       | TEST1      | TEST1    | 455464564654  |     |
|  | 6455425 | 09/24/2008 11:18     | TEST2       | TEST2      | TEST2    | 1235456       |     |
|  |         |                      | t           | t          |          | 123457        |     |
|  |         |                      | 1           | 1          |          | 123           |     |

A red box highlights the pencil icon for the entry with Id 6455425. A dropdown menu is open over this entry, showing options: Open entry, Edit entry, and Delete.

Note: here you have the option to Delete or Edit Entry

Once you open an entry you can Print, Edit, Delete or save the entry as PDF see page 6 and 7 .

The screenshot shows a web application interface with a toolbar at the top containing icons for adding, editing, deleting, and printing, along with navigation arrows. Below the toolbar are two checked checkboxes: "Show submission info" and "Show unanswered questions". The main content area displays a patient entry form with the following fields:

|               |                                       |
|---------------|---------------------------------------|
| Title         |                                       |
| Name          | copy_of_PB-SIL_Request_An_Appointment |
| Id            | 6455425                               |
| Creation date | 09/24/2008 11:18:57                   |
| Last modified | 10/09/2008 13:52:06                   |

Below the table, the form fields are as follows:

- First Name: TEST2
- Last Name: TEST2
- Address: TEST2
- Phone Number: 1235456
- E-mail:
- Birth Date:
- New Patient
- Select a Doctor: Select a Doctor
- Type of Appointment:

At the bottom right of the form, there is a "Close" button with a red box around it, and a "PDF" button next to it.

Click on Close, once you are done

Once you clicked on close the entry will take you back to the list of entries of the form

**Results**

Form: copy\_of\_PB-SIL\_Request\_An\_Appointment [View the ma](#)

Filter:  No filter |  Filter on keyword  |  Advanced filter

|  | Id      | Submission date+time | First Name: | Last Name: | Address: | Phone Number: | E |
|--|---------|----------------------|-------------|------------|----------|---------------|---|
|  | 6609189 | 10/16/2008 10:52     | TEST        | tETST      | TEST     | 123456        |   |
|  | 6609154 | 10/16/2008 10:48     | TEST        | TEST       | tETS     | 123465798     |   |
|  | 6455448 | 09/24/2008 11:21     | TEST1       | TEST1      | TEST1    | 455464564654  |   |
|  | 6455425 | 09/24/2008 11:18     | TEST2       | TEST2      | TEST2    | 1235456       |   |
|  | 6455405 | 09/24/2008 11:17     | t           | t          | t        | 123457        |   |
|  | 6455400 | 09/24/2008 10:50     | 1           | 1          | 1        | 123           |   |

Context menu for entry 6455425:

- Open entry
- Edit entry
- Delete

Now you can open up the next entry by doing the same steps on page 12.

To go back to the Form Summary page

Click on To Form Summary

**Results**

Form: copy\_of\_PB-SIL\_Request\_An\_Appointment

Filter:  No filter |  Filter on keyword  |  Advanced filter

|  | Id      | Submission date+time | First Name: | Last Name: | Address: | Phone Nu    |
|--|---------|----------------------|-------------|------------|----------|-------------|
|  | 6609189 | 10/16/2008 10:52     | TEST        | tETST      | TEST     | 123456      |
|  | 6609154 | 10/16/2008 10:48     | TEST        | TEST       | tETS     | 123465798   |
|  | 6455448 | 09/24/2008 11:21     | TEST1       | TEST1      | TEST1    | 45546456465 |
|  | 6455425 | 09/24/2008 11:18     | TEST2       | TEST2      | TEST2    | 1235456     |
|  | 6455406 | 09/24/2008 11:17     | t           | t          | t        | 123457      |
|  | 6455170 | 09/24/2008 10:50     | 1           | 1          | 1        | 123         |



Total: 6

New Delete all Refresh Download Email all Group email Statist

To Forms Summary

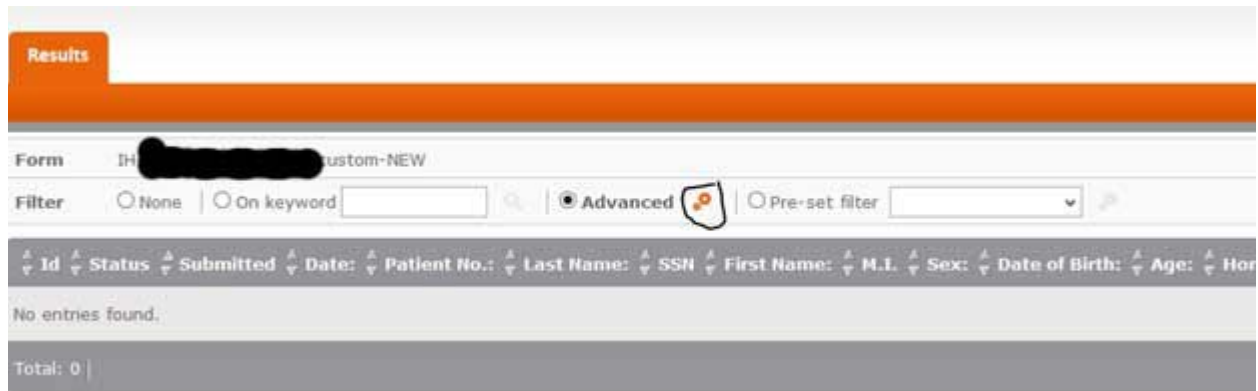


Here you repeat steps on page 10 to view all entries for another form

| Forms summary   |       |               |            |                |            |  |
|---|-------|---------------|------------|----------------|------------|--|
| Name  | Title | Creation date | Modified   | Stored entries | Last       |  |
|  copy_of_PB-ACPT_PatientRegistration   |       | 05/23/2007    | 10/13/2008 | 1              | 10/09/2008 |  |
|  copy_of_PB-SIL_Request_An_Appointment |       | 09/23/2008    | 10/16/2008 | 6              | 10/16/2008 |  |
| Number of forms: 2  |       |               |            | 7              |            |  |

## Delete Form Entries

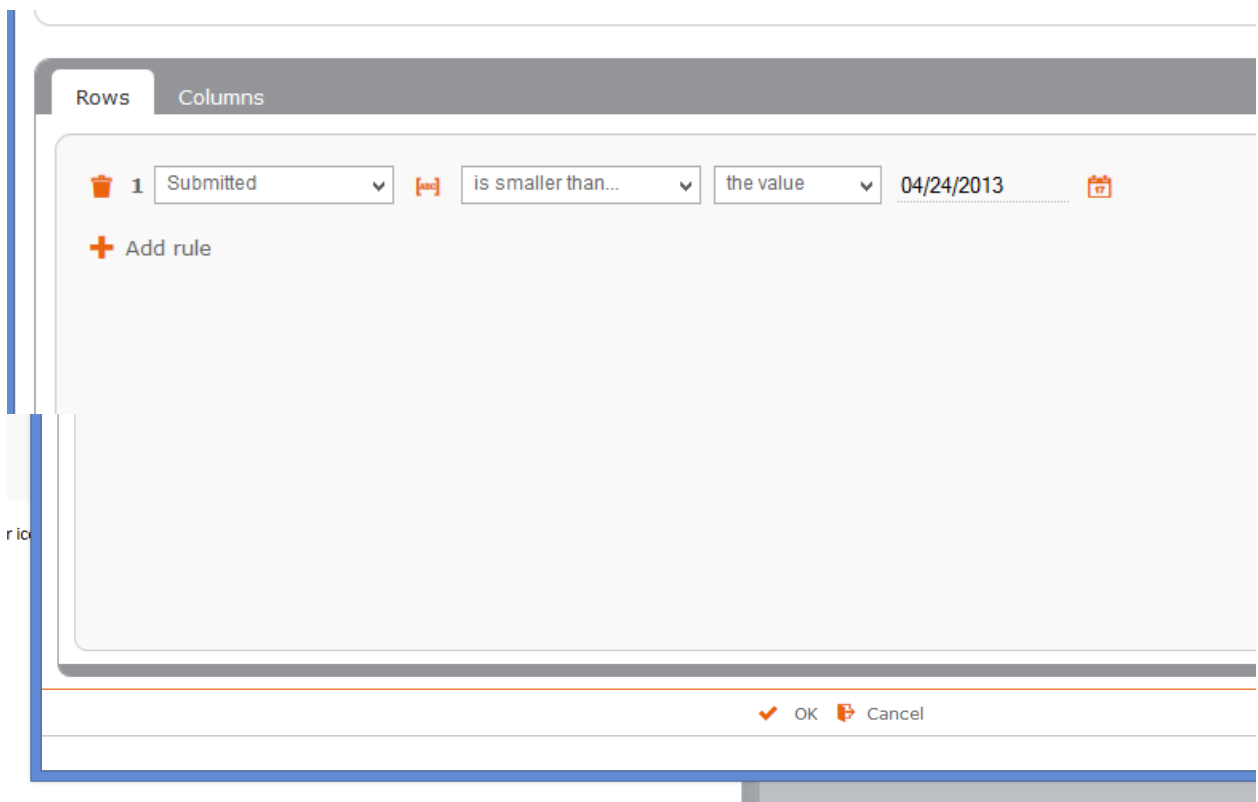
On the form's result tab click on select "Advanced" filter and then click the setting option



The screenshot shows a web interface with a 'Results' tab. Below the tab, there is a 'Form' field with the text 'IH [redacted] custom-NEW'. A 'Filter' section contains three options: 'None', 'On keyword' (with an empty input field), and 'Advanced' (which is selected and circled in red). To the right of 'Advanced' is a 'Pre-set filter' dropdown menu. Below the filter section, a table header is visible with columns: Id, Status, Submitted, Date, Patient No., Last Name, SSN, First Name, M.I., Sex, Date of Birth, Age, and Hor. Below the header, the text 'No entries found.' is displayed, and at the bottom, it says 'Total: 0'.

Now select "Submitted" on the first dropdown

Select conditions "is smaller than" and "the value"



The screenshot shows a dialog box for configuring a rule. It has two tabs: 'Rows' and 'Columns'. Under the 'Rows' tab, there is a list of rules. The first rule is numbered '1' and consists of a dropdown menu with 'Submitted' selected, followed by a red minus sign icon, a dropdown menu with 'is smaller than...' selected, another dropdown menu with 'the value' selected, and the date '04/24/2013' with a calendar icon. Below this rule is a '+ Add rule' button. At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons.

Now click on the Calendar icon to pick a date and click OK. This will filter and show you all entries which were submitted before your picked date.



Now you can delete all the filtered entries by Clicking on the Delete all button at the bottom.

The screenshot shows a data management interface. At the top, a header row contains the text: 28361410 Visitor Completed 07/31/2013 22:07 08/01/2013 smith. Below this is a grey bar with 'Total: 1208 | 1 | Next >>'. A toolbar below the bar contains icons for '+ New', 'Delete all', 'Refresh', 'Download', 'Import', 'PDF', and 'E'. At the bottom of the screenshot is a dark grey bar with a link icon and the text 'To Forms Summary'.

Once deleted select “None” Filter option to turn off you’re the advanced filter option.

The screenshot shows a data management interface. At the top, a filter bar contains the text: Filter  None |  On keyword  |  Advanced |  Pre-set. Below this is a table with the following columns: Id, Status, Submitted, Date:, Patient No.:, Last Name:. The table contains one row of data: 28438284, Completed, 08/09/2013 10:36, 08/09/2013, Lebowitz.

Once you are done reviewing forms and entries and you are back to the Form Summary Page, you can log off by clicking on the Log Out button to exit the database.

| Forms summary   |       |               |
|---|-------|---------------|
| Name  | Title | Creation date |
|  copy_of_PB-ACPT_PatientRegistration   |       | 05/23/2007    |
|  copy_of_PB-SIL_Request_An_Appointment |       | 09/23/2008    |

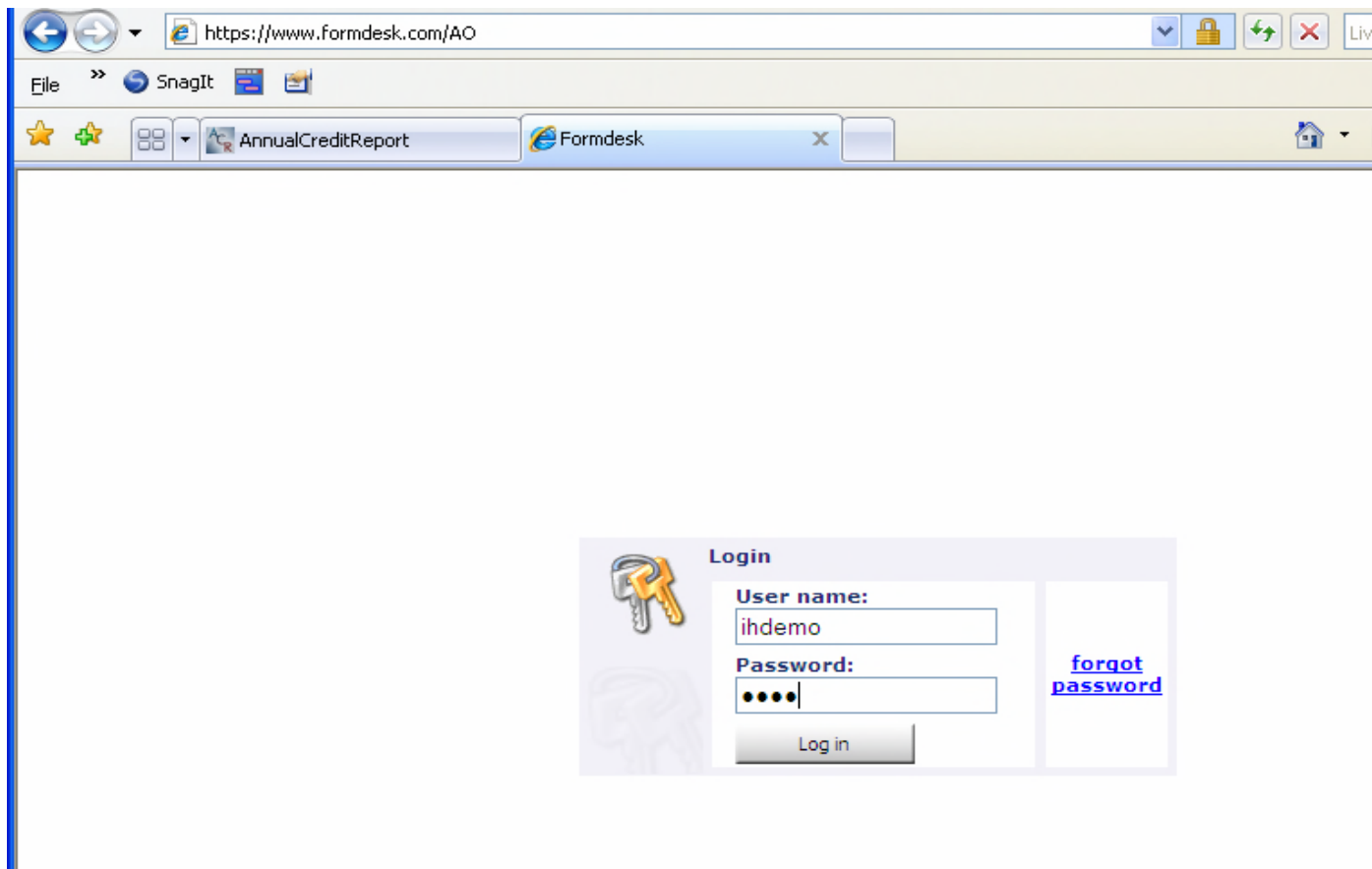
Number of forms: 2

 Search on Entry Id/Order No.

Log out

Simple mode

You can also directly login to the database by going to <https://Formdesk.com/AO> . Once you are logged in it will take you to your Form Summary Page. then you can follow the steps from page 9



# Questions?

Please contact our

Support email @

[support@ihealthspot.com](mailto:support@ihealthspot.com)

Or

Call us @ 1-877-709-0999