FORM BUILDER QUICK START GUIDE

How to create, preview, configure, and publish a custom patient form

1. Build the Form

Tip: *Save time by starting with a preconfigured template and customize only the fields and settings your clinic needs.*

1	**Open Form Builder**. Sign in to Ascend through the organization's login portal. Go to *Settings* > *Location* > *Form Builder*, then select *Create Form*.
2	**Choose a starting point.** Select *Blank* or a preconfigured template, then select *Next*.
3	**Name the form.** In the *Properties* panel, enter a clear *Form Name*.
4	**Add and configure elements.** Drag *Patient Fields*, *Basic Fields*, or *Display elements* into the design workspace. Select each element to update labels, content, required responses, choices, alignment, or layout. **Tip:** Add an *Image* display element to upload a clinic logo or header image and personalize the form.
5	**Organize the longer form.** If creating a form from scratch, add the *Steps* display element and use Add *(+)* to create additional steps. Preconfigured templates may already include steps and section layouts.
6	**Confirm the submission control.** If creating a form from scratch, confirm that a submission control is included. Forms that use *Steps* or *Tabs* automatically include a *Finish* button on the last step. Preconfigured templates typically already include the required submission controls. Verify that a *Finish* or *Submit* button is available before publishing the form.

2. Preview the Form

1	**Open Preview mode.** Select the *Preview (eye)* icon in Form Builder.
2	**Review the patient experience.** Check the instructions, field order, required fields, steps or tabs, and the *Finish* or *Submit* button.
3	**Return to editing.** Select the *Editor* () icon, make any required changes, and preview the form again if needed.

3. Configure Form Settings

After the form is built and previewed, select **Next** to open Form Settings. The form is saved automatically when this page opens.

Setting	What to Configure
Form Status	Turn on to publish immediately or leave off to keep the form unpublished.
Is Org-wide Form?	Leave selected for all locations or clear it to assign specific locations.
Send Automatically	Turn on to send the form automatically to eligible patients.
Patient Type	Select New Patient, Existing Patient, or both.
Form Frequency	Select how often patients must complete the form.
Requires Provider Review	Turn on to mark submitted forms as Review Needed, making it easier to identify forms requiring provider follow-up.

Select **Done** to save the settings and return to the Patient Forms list.

4. Publish the Form

1	**Locate the form.** On the Patient Forms page, find the completed form.
2	**Open the Actions menu.** Select the ellipsis *(...)* in the Actions column.
3	**Publish.** Select *Publish* to make the form available to patients.

Important: *Only Published forms can be sent to patients. Unpublished forms remain available for editing but are not available to patients.*