Consent Forms vs. Check-In Process

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This article will compare the key differences between consent forms in relation to the check-in process, specifically focusing on check-ins conducted through the iOS app versus the OnPatient platform.

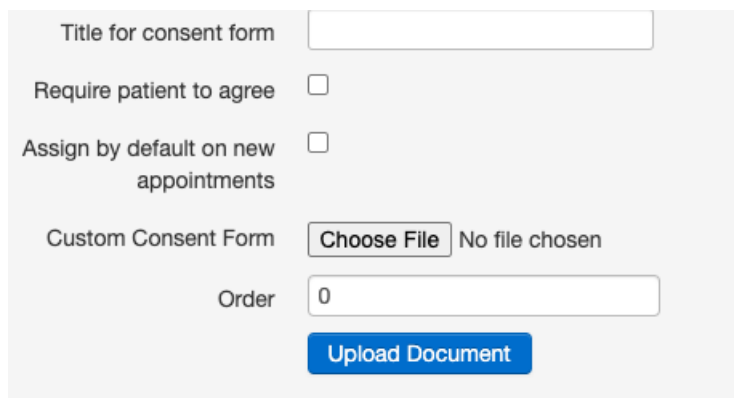## What is a consent form vs. OnPatient / Check - In app?

Consent Form: A PDF attachment that can be easily uploaded to your DrChrono account, allowing patients to review and electronically sign the form to provide their consent. This process is available through both the OnPatient platform and the iPad Check-In App.

OnPatient / Check-In App: Patients can conveniently check in for their appointment through the OnPatient portal before arriving at your office or via the Check-In app in office. All patient health information is securely saved in DrChrono for easy access and streamlined appointment management.

Uploading a consent form

To upload a consent form navigate to Patient's > Consent Forms.
- Fill out the necessary fields
- Title for consent form: label the consent form
- Require patient to agree: check the box if the consent form is required to be agreed to.
- Assign by default on new appointments: check the box if the consent should be attached to a visit by default.
- Custom consent form: click the box to choose a file from your device (ie: computer) to upload. Only .pdf files are accepted.
- Order: the order that the forms will appear in.
- Upload document: the file will be uploaded to the list on consent forms page.

Customizing templates for Check- In app and Onpatient portal

Like clinical note forms, users have the option to customize forms that patients can view and fill out during the check in process. These forms are labeled as Onpatient Additional Info and Onpatient Reasons for Visit forms.

To customize the forms navigate to clinical > clinical form management. The forms are labeled as Onpatient Additonal Info and Onpatient Reasons for Visit forms.

The **Additional Information** and **Reasons for Visit** sections are customizable sections, and you may add any fields you wish using the DrChrono EHR Form Builder. Any short text fields, single/multi checkboxes, toggle switches, selection boxes, fraction fields and free draw fields can be added here.

← onpatient Additional Info ⚙

| Form Element | Clipboard 2 |

Insurance Card

✎ Free Draw

Follow up Questionnaire

How would you describe your mood?

Text Field

Where did you find us?

Single Select ▼

Which specialists do you see?

Multiple Select ▼

Who referred you?

Text Field

Do you use online scheduling?
⚪ OFF

Want access to online portal?
⚪ OFF

Switch	% Fraction Field
✎ Free Draw	H Header
☑ Multi Select	◉ Yes / No
→ Reference	Tт Text Field
⊙ Single Select	h Subheader

← onpatient Reasons For Visit ⚙

| Form Element | Clipboard 2 |

Allergies ⚪ OFF	Annual Physical Exam ⚪ OFF
Anxious ⚪ OFF	Asthma ⚪ OFF
Attention Problems ⚪ OFF	Back Problems ⚪ OFF
Broken/ Fractured Bones ⚪ OFF	Cold ⚪ OFF
Cough ⚪ OFF	Depression ⚪ OFF
Dizzy ⚪ OFF	Earache ⚪ OFF
Diabetes ⚪ OFF	Diarrhea ⚪ OFF

Switch	% Fraction Field
✎ Free Draw	H Header
☑ Multi Select	◉ Yes / No
→ Reference	Tт Text Field
⊙ Single Select	h Subheader

Learn more about

Adding and Setting Up Consent Forms

OnPatient Onboarding/Check-In Overview

Customizing the OnPatient Onboarding/Check-In Interface