Optic Patient Portal Intake iForms

Accessing the Intake iForm

1. From the main page, select Care Solutions, then iForms.

2. If the Intake iForm is not available, click Add New iForm. If the iForm is available, skip to step 5.

3. Available iForms will display, click the down arrow next to the Intake Form.

4. Click Enroll.
5. On the **Assign iForm Permission** screen, check the box to share the Intake information with the wellness center, then **Continue**.

   This check box is **required** to ensure the wellness center receives the iForm detail.

![Assign iForm Permission Screen]

6. Click **Begin** on the Intake iForm screen.

![Intake iForm Screen]

7. Fill in all required fields.

   a. There will be several pages of questions regarding medical history to complete.

   Use the **Continue** button at the bottom of each page to move onto the next page.

8. Once complete, click **Review**.

![Review Button]

9. A summary of data entered will be displayed. Review the data then click **Submit**.

![Submit Button]

10. The information will be sent to the wellness center and a success message will display.

    The Intake iForm process is complete.

![Success Message]