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](image)

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

![Intake iForm screen](image)

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](image)

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

 ![Submit button](image)

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

   The Intake iForm process is complete.