



5 Types of Digital Forms Every Practice Should Have



Legwork

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Introduction

Although “going to the dentist” doesn’t rank on most people’s “favorite activities” list, completing necessary paperwork upon arrival can be an additional stress-inducing step to an already-often avoided endeavor. Imagine repositioning this step so patients can complete forms on their own time where they feel most comfortable. Essentially, you could move your waiting room to a patient’s living room!

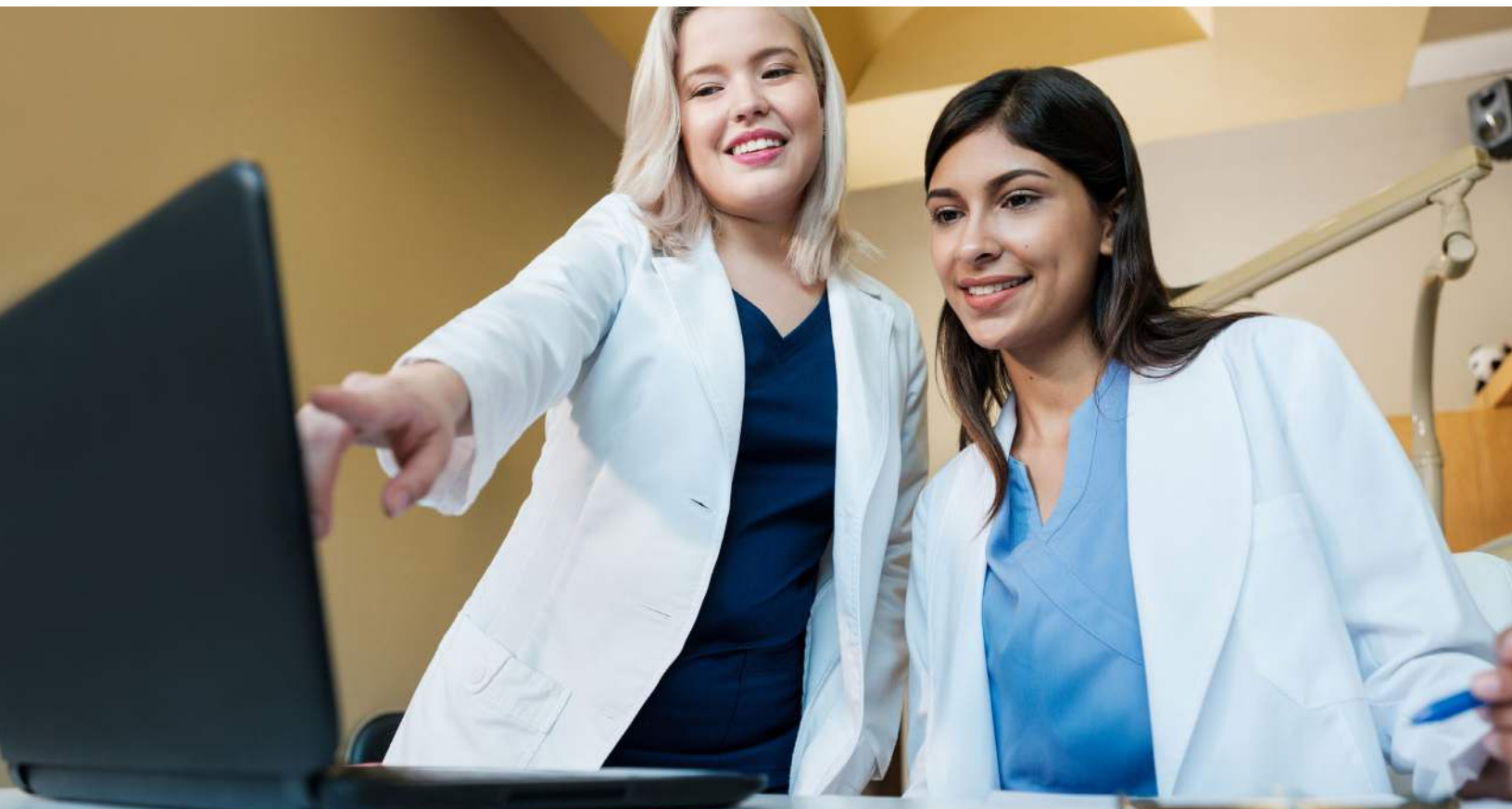
In contrast, dental practices’ traditional approach to forms has been that when patients arrive for an appointment, a front office staff member hands them paperwork attached to a clipboard. The patient completes it and hands the form back, along with their insurance card. Office staff make photocopies of the card, attempt to decipher illegible writing to transfer all the information into their practice management software, and then replace the form on the clipboard in preparation to repeat the process for the next patient.

It's Time To Move Away From Paper!

Doing so will reduce your workload, clerical errors, and lengthy, in-person interactions.

With the need for extra precautions in place these days, implementing contactless communication puts your patients' minds at ease while saving you and your team time and money. Eventually, you'll want to replace ALL your paper forms with digital ones, but **five you should definitely have in a digital format include the following:**

- 1 Patient Intake Forms
- 2 Health History Forms
- 3 Custom Consent Forms
- 4 COVID Pre-Screen
- 5 Financial Policies



5 Types of Digital Forms

Essential Forms for Every Dental Practice

1.

Patient Intake Forms

Collect patients' basic contact information with a Patient Intake Form, also known simply as "Patient Information." These forms include a patient's name, Social Security number, emergency contact, and employer that you collect from new patients prior to their first appointment. **In addition to collecting basic contact information, you might also use this form to request:**

- ✓ Billing information
- ✓ Employment status
- ✓ Referral information (e.g., "Please share with us how you heard about our office." Then include a checklist of options.)

Prior to subsequent appointments, have patients update any necessary information like their address, employer, or a name change.



2.

Health History Forms

Track your patients' medical history, current conditions, and notes from previous dental practices where they received care in a Health History Form. You'll want to collect these from new patients prior to their first appointment and update before subsequent appointments. Some specialist practices prefer to split their Dental History Form from a general Medical History Form, as Bosque Dental Care¹ does. **Their Dental History Form includes oral hygiene questions as well as inquiries about previous experience visiting the dentist, such as the following:**

- 1 How do you feel about dental treatment?
- 2 How would you rate your previous dental experience?
- 3 How often do you brush?
- 4 How often do you floss?
- 5 When was your last dental visit?




Example Questions from Bosque Dental Care's Medical History Form include:






- ☒ Are you currently being treated by a physician for a specific condition?
- ☒ Have you recently been hospitalized or had a major operation?
- ☒ Have you ever had a serious head or neck injury?
- ☒ Are you taking any medications, pills, or drugs?
- ☒ Do you have, or have you ever had any of the following medical conditions?
(Please select all that apply.) *Then include a list of conditions that are pertinent for the practice providers to know.*

3.

Custom Consent Form

These forms outline specific procedures that your practice offers, along with risks involved. Their primary purpose is to brief patients on what to expect and to secure a signature authorizing the treatment. Before the procedure, you'll want to have patients provide their consent by signing this form; if gaps occur in fulfilling the treatment plan, you may need to ask a patient to update the form.

 **Germantown Dental Village² is an example of a practice that offers custom consent forms to nearly two dozen procedures, accessible via their website. Their "Consent For Complete Denture Therapy" includes a list of potential risks and side effects, such as:**

-  Removable dentures ***do not have the same efficiency*** as natural teeth.
-  The presence of acrylics, metal, or porcelain ***can alter speech*** and will require adaptation of the tongue and lips for proper speech.
-  Dentures can ***affect the taste of food***.
-  Dentures may acquire stains and odor.
-  Dentures should be ***replaced approximately every 5-7 years*** due to significant and normal changes with the aging process.(Please select all that apply) Then include a list of conditions that are pertinent for the practice providers to know.

4.

COVID Pre-Screen

COVID Pre-Screening Forms help assure patients that you're taking necessary precautions at your practice. You'll want to have patients complete these pre-appointment before every single visit during this season. By linking this form to a Patient Portal, you can send an automated reminder for patients to complete it the day of their appointment along with their curbside check-in.



Sample questions for this form include inquiries like Classique Dental Care³ asks:

- ☒ Do you have fever or have you felt hot or feverish, experienced chills or repeated shaking with chills recently (14-21 days)?
- ☒ Any other flu-like symptoms, such as gastrointestinal upset, muscle pain, headache or fatigue?
- ☒ Are you having shortness of breath or other difficulties breathing?
- ☒ Have you been in contact with someone who has tested positive for or suspected they were positive for COVID-19 (coronavirus) in the last two weeks?
- ☒ Have you tested positive for COVID-19 or are you awaiting test results for COVID-19 within the last 10 days?

5.

Financial Policies

A Financial Policies Form is where you list your policies on cancellations, no-shows, late fees, delinquent accounts, and insurance protocols. The primary purpose of this form is to collect a patient or guardian's signature confirming that they acknowledge and agree to these conditions, as Little Koala Pediatric Dentistry lists in their digital Financial Policy⁴. Additionally, you may want to set up a digital form to collect insurance information, like Bosque Dental Care¹ does. **This form would include the following:**

- ✓ Insurance company name
- ✓ Insured's employer
- ✓ Policy number
- ✓ Group number
- ✓ Insurance address

Prior to their appointments, you'll want to have patients confirm that their insurance information is up-to-date. They may need to complete a new Financial Policies Form if pertinent info has changed.



Safety First

In addition to assuring your patients' of their health safety, electronic forms provide extra security when you use systems like Legwork Paperless⁵ that are HIPPA-compliant. You'll reduce the risk of papers floating about the office, getting misplaced, and being seen by the wrong eyes.

Start boosting your practice's efficiency and security by digitizing these five digital forms today!

A man and a woman are sitting together, looking at a laptop screen. The man is on the left, wearing glasses and a dark shirt. The woman is on the right, wearing glasses and a blue shirt. They are both smiling and appear to be working together. The background is a blurred office setting with a plant visible on the right.

Go Paperless At Your Practice.

WATCH A DEMO

Sources

1. Bosque Dental Care New Patient Forms, <https://www.bosquedentalcare.com/new-patient-forms-library/medical-history>
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3. Classique Dental Care Patient Forms, <https://www.classiquedentalcare.com/fremont-patient-forms-library/communication-release-6se99>
4. Little Koala Dental Patient Forms, <https://www.littlekoaladental.com/patient-form>
5. Legwork Software Paperless Forms, <https://www.legwork.com/paperless-forms>



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