

CLIENT INTAKE AND FORMS

From a client-type checklist to completed answers

See how a clinic can track required intake, let a client complete a form without signing in, and review the finished answers from the booking.

1 · TRACK

The client profile shows the intake requirement and its current status.

2 · COMPLETE

The client opens the secure link and fills the form in a browser.

3 · CONFIRM

The client receives an immediate submission confirmation.

4 · REVIEW

Staff see the completed assessment on the booking and open its answers.

This guide begins after the client exists. Email, phone, SMS, and online-booking intake can create the original inquiry or client. This workflow covers the structured forms and checklist that follow.

1

● CLIENT PROFILE

See the intake requirement and its status

Grace is a Private Pay client, so her profile includes the Patient Intake step. The checklist shows it as Waiting and includes the due date. Depending on progress, checklist items can appear as Pending, Waiting, Done, or Failed.

The screenshot displays the InToday client profile interface. On the left is a vertical sidebar with icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is titled 'Client Settings' and includes sections for 'Send Patient Intake to new Private Pay clients' (with a 'Try again' button) and 'AI Conversations'. Below these is a list of menu items: Bookings, Intake Checklist (highlighted), Surveys & Results, AI Insights, Notes, Users, Care Team, Comments, Invoices, Attachments, Services Count, and Referrals. The 'Intake Checklist' section shows a 'Patient Intake' item with a 'Waiting' status and a due date of 'Due October 15, 2026'. A 'Feedback' button is visible on the right side of the interface.

2

● CLIENT EXPERIENCE

Open the intake form without signing in

The secure form link opens directly in the clinic's branded client experience. The progress indicator shows each section, while required fields are clearly marked before the client continues.

The screenshot displays the 'Sunrise Healthcare' client experience interface. At the top, the header includes the clinic name 'Sunrise Healthcare' and the tagline 'In Today - Practice Management'. Navigation links for 'Book Now' and 'Login' are present in the top right corner. The main content area is titled 'Patient Intake' and 'Patient Assessment Form'. A progress indicator shows seven sections: Patient information, Health history, Social history, Surgical history, Family history, Preventive care, and Symptoms. The 'Patient information' section is currently active, indicated by a blue circle. Below the progress bar, a disclaimer states: 'All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality.' The form includes input fields for 'First name *' and 'Last name *', a 'Date of birth *' field with a calendar icon, and a text area for 'List any concerns you want to talk about during your visit'. A 'Next' button is located at the bottom of the form. A chat icon is visible in the bottom right corner of the interface.

Sunrise Healthcare
In Today - Practice Management

Book Now Login

Patient Intake

Patient Assessment Form

Patient information Health history Social history Surgical history Family history Preventive care Symptoms

Patient information

All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality.

First name * Last name *

Date of birth *

yyyy-mm-dd

List any concerns you want to talk about during your visit

Next

Complete the required details and visit concern

The client enters the information the clinic needs before the visit. The form can include identity details, health history, symptoms, and other assessment questions configured by the clinic.

The screenshot shows a web interface for "Sunrise Healthcare" with the sub-header "In Today - Practice Management". In the top right corner, there are two buttons: "Book Now" (with a calendar icon) and "Login" (with a user icon). The main content area is titled "Patient Intake" and "Patient Assessment Form". Below the title is a progress bar with seven steps: "Patient information", "Health history", "Social history", "Surgical history", "Family history", "Preventive care", and "Symptoms". The "Patient information" step is currently active, indicated by a blue circle. The form contains a disclaimer: "All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality." Below this, there are input fields for "First name *" (containing "Grace") and "Last name *" (containing "Okafor"). The "Date of birth *" field contains "1996-10-01" and has a calendar icon. A text area labeled "List any concerns you want to talk about during your visit" contains the text "Work-related stress and sleep changes over the last month." At the bottom of the form is a "Next" button. A chat bubble icon is located in the bottom right corner of the interface.

Sunrise Healthcare
In Today - Practice Management

Book Now Login

Patient Intake

Patient Assessment Form

Patient information Health history Social history Surgical history Family history Preventive care Symptoms

Patient information

All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality.

First name * Last name *

Grace Okafor

Date of birth *

1996-10-01

List any concerns you want to talk about during your visit

Work-related stress and sleep changes over the last month.

Next

Review the answers before submitting

Before the final submission, the client can review what they entered and return to any section to make a correction.

Sunrise Healthcare
In Today - Practice Management

 Book Now

 Login

Patient Intake

Patient Assessment Form

Patient information

All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality.

First name *	Last name *
Grace	Okafor

Date of birth *

1996-10-01

List any concerns you want to talk about during your visit

Work-related stress and sleep changes over the last month.

Edit

Health history

Do you have diabetes?	High blood pressure?
No Yes	No Yes
High cholesterol?	
No Yes	



5

● CLIENT EXPERIENCE

Receive an immediate confirmation

After submission, the client sees a clear success message. No staff login or separate portal navigation is required to complete this intake form.

The screenshot displays a web interface for Sunrise Healthcare. The header features the company name 'Sunrise Healthcare' and the tagline 'In Today - Practice Management' on the left, and 'Book Now' and 'Login' buttons on the right. The main content area has a light pink background with the text 'Thank You!' and 'Your response has been submitted successfully.' Below this is a blue button labeled 'SUBMIT ANOTHER RESPONSE'. The footer contains the company name and tagline on the left, a navigation menu with 'Our Services', 'About Us', 'Contact', and 'Book Now' in the center, and a copyright notice '© 2026 Sunrise Healthcare. All rights reserved' and a chat icon on the right. A blue banner at the bottom center reads 'Response submitted successfully!' with a checkmark icon.

Sunrise Healthcare
In Today - Practice Management

Book Now Login

Thank You!

Your response has been submitted successfully.

SUBMIT ANOTHER RESPONSE

Sunrise Healthcare
In Today - Practice Management

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Response submitted successfully!

See the completed assessment on the booking

The same booking now shows Patient Intake under Assessment Results with a Complete status. Staff can open the response without searching through a separate inbox or matching it manually.

The screenshot displays the InToday booking interface for a staff member named Jordan Avery. The main booking card for Grace Okafor is shown with a 'Confirmed' status and a '1:00 PM' appointment time on 'Oct 1, 2026' for a '30m' duration. The appointment is for 'Standard Treatment' with Dr. Elena Vasquez. Below the booking card, there are three red status indicators: 'Requires Notes', 'Service Not Valid For Client Type', and 'Requires Location'. A 'Set Location' section is visible, showing three options: 'Office Visit' (Client comes to your office location), 'External Location' (Meet at client location or other venue), and 'Virtual Meeting' (Video call or phone appointment). A 'SAVE LOCATION' button is at the bottom of this section. Below the location settings, there is a horizontal bar with various icons for 'ADD', 'Documents', 'Session prep', 'Video call', 'Tasks', 'Insurance', 'Budgets', 'Comments', and 'Notifications'. The interface is divided into two main sections: 'CLINICAL' (Session prep, charting, files) and 'FINANCIAL' (Billing, payouts, coverage, budgets). Under 'CLINICAL', there are 'Appointment Details' (Needs Location, 4) and 'Charting' (New Chart Entry, Needs Notes). Under 'FINANCIAL', there is 'Billing' (Invalid Service, PENDING, 2). On the right side, there is a 'SYSTEM' panel with links to 'Appointment History' (6), 'Activity Log', 'Communications' (Log), and 'Assessment Results' (1). The 'Assessment Results' section is expanded, showing 'Patient Intake' (Oct 1, 2026) with a 'Complete' status and a 'VIEW RESULTS' button. A 'Feedback' button is located at the bottom right of the 'Assessment Results' section.

Open the answers in a readable staff view

The completed result keeps the client, practitioner, completion status, and submitted answers together. Staff can review the form before or during the appointment.

The screenshot shows a web application interface for a staff member to review a completed patient intake form. The interface includes a sidebar with navigation options: Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area displays the 'Patient Intake' form, which is marked as 'Completed - Oct 1, 2026'. The form is for a client named Grace Okafor, with a practitioner named Dr. Elena Vasquez. The form is divided into two main sections: 'Patient information' and 'Health history'. The 'Patient information' section includes fields for 'First name' (Grace), 'Last name' (Okafor), and 'Date of birth' (1996-10-01). It also has a text area for 'List any concerns you want to talk about during your visit' with the text 'Work-related stress and sleep changes over the last month.' The 'Health history' section includes three questions: 'Do you have diabetes?' (No/Yes), 'High blood pressure?' (No/Yes), and 'High cholesterol?' (No/Yes). A 'Feedback' button is visible on the right side of the form.

Patient Intake Completed - Oct 1, 2026

Client: Grace Okafor · Practitioner: Dr. Elena Vasquez

Patient information

All fields with an asterisk (*) are required fields, and must be filled out in order to process the information in strict confidentiality.

First name * **Last name ***

Grace Okafor

Date of birth *

1996-10-01

List any concerns you want to talk about during your visit

Work-related stress and sleep changes over the last month.

Health history

Do you have diabetes? **High blood pressure?**

No Yes No Yes

High cholesterol?

No Yes

Feedback

The intake checklist closes the loop

Returning to the client profile shows Patient Intake as Done. The checklist gives the team one place to confirm that required intake has moved from waiting to completed.

The screenshot displays the InToday client profile interface. On the left is a vertical sidebar with icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is titled 'Client Settings' and includes sections for 'Send Patient Intake to new Private Pay clients' (with a 'Try again' button) and 'AI Conversations' (with 'Rail' and 'Accordion' options). Below these is a list of client profile sections: Bookings, Intake Checklist (highlighted in blue), Surveys & Results, AI Insights, Notes, Users, Care Team, Comments, Invoices, Attachments, Services Count, and Referrals. The 'Intake Checklist' section shows a single item, 'Patient Intake', marked as 'Done' with a green checkmark and a due date of 'Due October 15, 2026'. A 'Feedback' button is visible on the right side of the interface.

One connected path for clients and staff



Requirements follow the client.

Client-type intake rules can surface the right checklist for the team.



Clients can complete forms without an account login.

The secure link opens the clinic-branded form directly.



Bookings hold the completed result.

Staff see the assessment in the context of the visit and open the answers in one click.



Status updates are visible.

The client profile moves from Waiting to Done when the linked intake is submitted.

Explore InToday

Bring client intake, assessments, booking context, charting, communications, and billing together in one platform.

This workflow complements—rather than replaces—the email, phone, SMS, and online-booking intake paths used to create the original inquiry.

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