Remove Custom Forms in Updox

t Modified on 04/08/2024 10:01 am EDT

his workflow will provide the necessary steps in CMD and Updox for deleting a custom intake form.

- 1. Select Account Administration > Services.
- 2. Click the button next to Intake Forms.
- 3. From the Forms Options tab, click Open Updox.
- 4. Click Menu > Admin > Form Management.

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Home	Fri 04/05/24 10:34 AM	> Patient Demographics					System	m Process		
sers		Form:Patient Demog	raphic	s						
lueues		New Patient Registration Form								
ractice Information		Please fill out this form completely. If you have any questions, please contact the office. Thank you and we look forward to seeing you!								
ractice Settings		Patient Information								
ecure Text Settings		Suffix								
lessenger Settings		First Name					-			
box Buttons		Middle Initial					-			
		Last Name								
ategories		Date of Birth								
atient Portal		SSN					CONTRACTOR CONTRACTOR			
ags		Sex					1000			
orm Management		Street Address								
mplates		Apartment, Suite, Etc. (Option	al)							
heduling		City					-			
eminders		State								
underst Canfin unting		ZIP Code								
roadcast Configuration		Home Phone Number					1000			
inter User Mapping		Cell Phone Number								
		Work Phone Number					10000			
🕼 Refer & Share		Work Phone Extension					-			
& Profile (& Sign out		Email								
- rrome er sign out		Who is your Primary Care Prov	ider (PCF)?			none			_

5. Select the existing form you want to remove/edit from the list.

6. Click Delete Form.

Form Title	Fields				
Patient Health Questionnaire - Depre	Over the last 2 weeks, how often have you been bothered by any of the following problems?				
Submit To	Little interest or pleasure in doing things * Not at all Several days More than half the days Nearly every day	Ľ × =			
	Feeling down, depressed, or hopeless * Not at all Several days More than half the days Nore than half the days	Ľ×=			

7. Click Save.

- 8. Exit the Updox screen again and return to the Forms Options tab in CMD.
- 9. From the Forms Options tab, click Open Updox
- 10. From the Menu screen, navigate to *Home > Forms Library*.



- 11. Verify that the form is no longer in your library list.
- 12. Return to the Forms Options tab in CMD (step 3).
- 13. Scroll down and find the Form Title you deleted in Updox.
- 14. Check the *Deleted* box next to the form you just removed.
- 15. Click Save.