

IntakeQ

Intake Form Cheat Sheet

This is an extra resource to go along with the original article:

[6 Common mistakes when creating intake forms](#)

In the article you learned what not to do when it comes to intake forms, but how about the stuff you should be doing? Follow this quick Intake Form Cheat Sheet for help.

Be sure to include spaces for patients to enter:

- Name
- Birthdate
- Address
- Contact Number
- Emergency Contact

And, if applicable, ask for insurance information, including:

- Insurance Provider
- Member Number
- Group Number

Always inquire about the patient's:

- Reason for Visit
- Symptoms
- Medications
- Allergies
- Medical History

Don't forget to ask:

- Is there anything else you'd like us to know?
- What questions do you have for the doctor/specialist?
- How did you hear about us?

And always remember to include:

Branding

- Welcome Note
- Open-Ended Questions
- Conditional Questions
- Contact Information
- "Thank You"

If your intake forms include all of the above then you should have all the information you need to provide efficient and exceptional care to your patients.