



## Worksheet: Create Intake Forms For Your Practice

*This is an extra resource to go along with the original article:  
[Is electronic paperwork right for your healthcare practice?](#)*

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Interested in creating custom intake forms for your private healthcare practice?  
Here's an easy worksheet to help you get started:

1. What's the goal of the intake form?
  - a. To gather intel about a patient's history and lifestyle
  - b. To communicate critical information
  - c. To get required signatures on liability, etc.
  
2. What's the tone you'd like to communicate?
  - a. Warm and friendly
  - b. Authoritative and knowledgeable
  - c. Quick and efficient
  
3. How long should the form take to fill out?
  - a. Anywhere from 10 minutes to an hour
  - b. Less than 5 minutes, plus reading time
  - c. A few seconds
  
4. How important is the form to providing care?
  - a. Critical: need intel on patient
  - b. Important: need to communicate info to patient
  - c. Necessary, but doesn't relate directly to care

*If you answered mostly a's, you'll probably want to create a pre-appointment patient questionnaire. If you answered mostly b's, you'll want to create a custom info sheet. If you answered c's, you're looking for a quick, one-page form.*