

Quick How-To: How to Fill Out a Medical or Clinic Form Online

Who is this for?

This guide is for anyone who may need to complete a medical intake or registration form online. In some cases, the online form may be required before you are able to see the doctor or required before you are able to schedule an appointment to be seen at the clinic.

Step-by-Step Instructions

Step 1: Locate the Form Link

- Your clinic may email you a link or have a patient portal on their website.
- Look for buttons labeled **'New Patient Form'**, **'Pre-Visit Forms'**, or **'Check In Online'**.

Step 2: Log In or Access as Guest

- If you use a portal, log in with your username and password.
- If it's a direct link, you may not need to log in.

Step 3: Complete the Personal Information Section

- Fill in your name, birthdate, contact info, and emergency contact.
- Make sure all fields are spelled correctly.

Step 4: List Your Medications and Conditions

- List any medicines you're currently taking.
- Include allergies, past surgeries, or major health concerns.
- If you're unsure, leave a note or check with your clinic.

Step 5: Answer Family and Lifestyle Questions

- These might include family medical history, tobacco/alcohol use, or mental health history.
- Be honest — it helps your doctor care for you better.

Step 6: Review and Sign

- Look over everything before submitting.
- Use your finger or mouse to sign if required.
- Click **Submit** when you're finished.

You Did It!

You've completed a digital medical form — now your clinic has all the information needed to be able to provide you with the best health care possible.