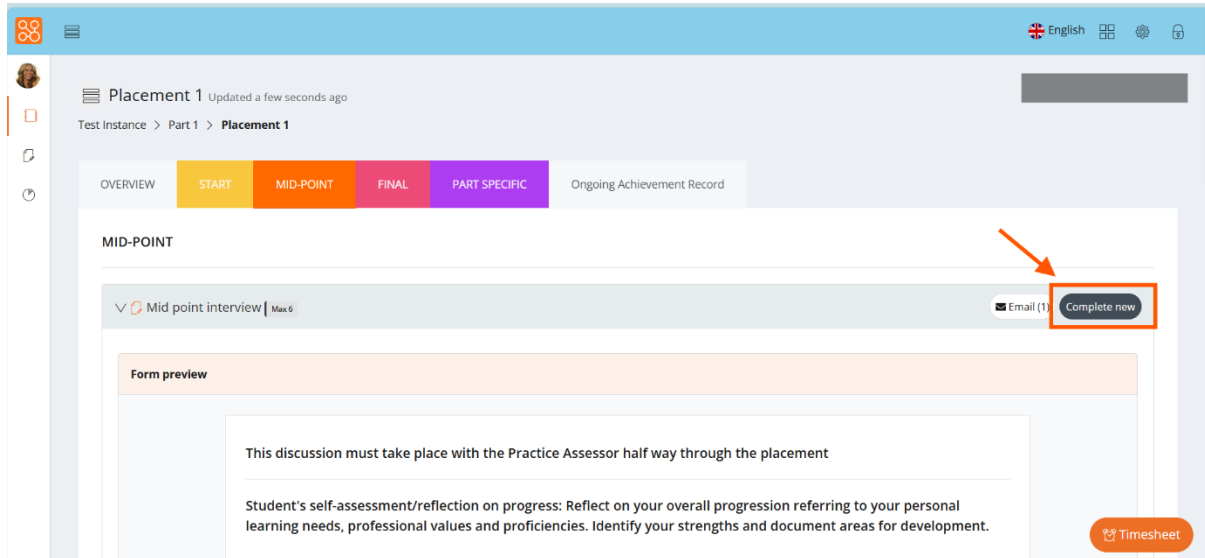


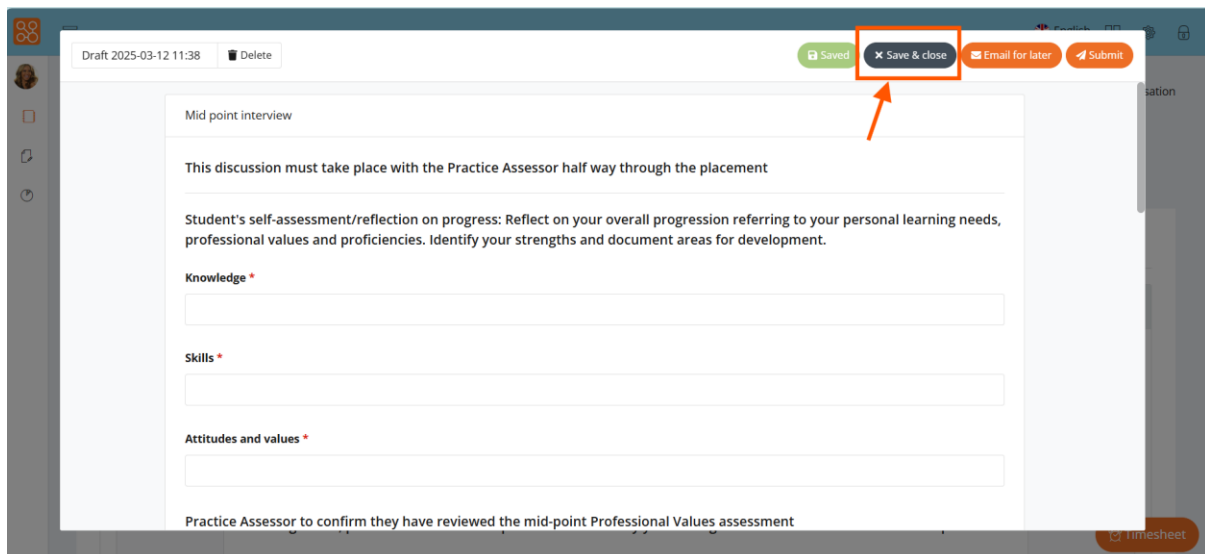
Creating and completing forms

Creating a draft

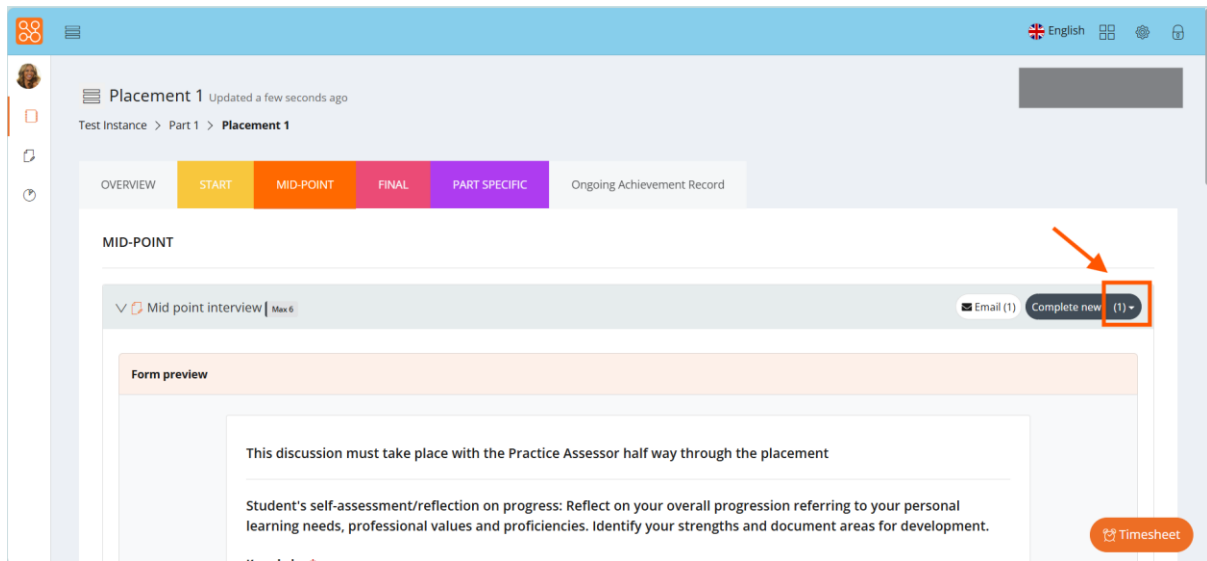
To create a draft form, click on the **Complete New** button on the form.



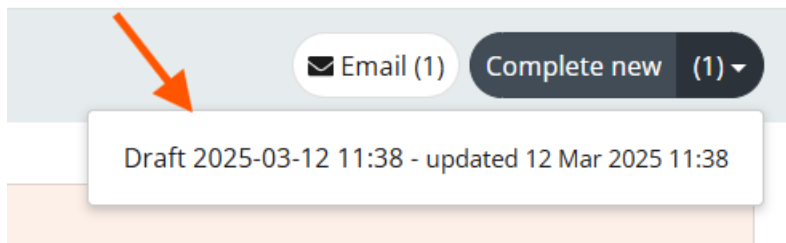
Click **Save & Close**.



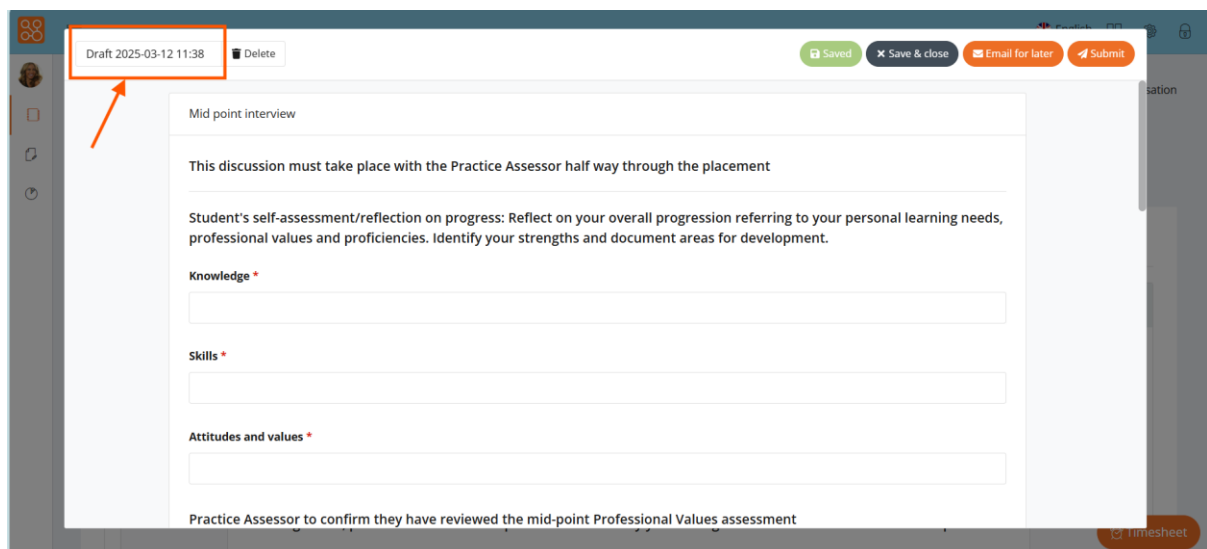
This creates a draft and appears as a number next to the **Complete New** button on the form. To access the draft, click on the number.



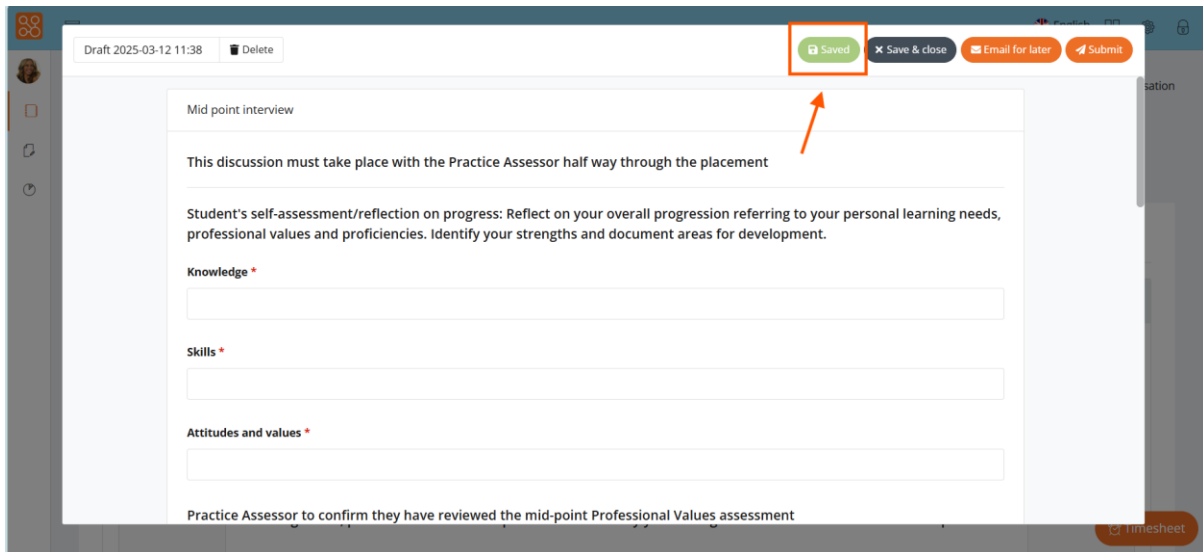
This will bring up a list of all of the drafts you've created. Check the date of when the draft was created and when it was updated. If it matches the one you want to edit, click on the draft.



And it will re-open the draft where you left off. If you want to double check to see if it's the same one you clicked on, you can check the date in the top left hand corner of the pop up screen.

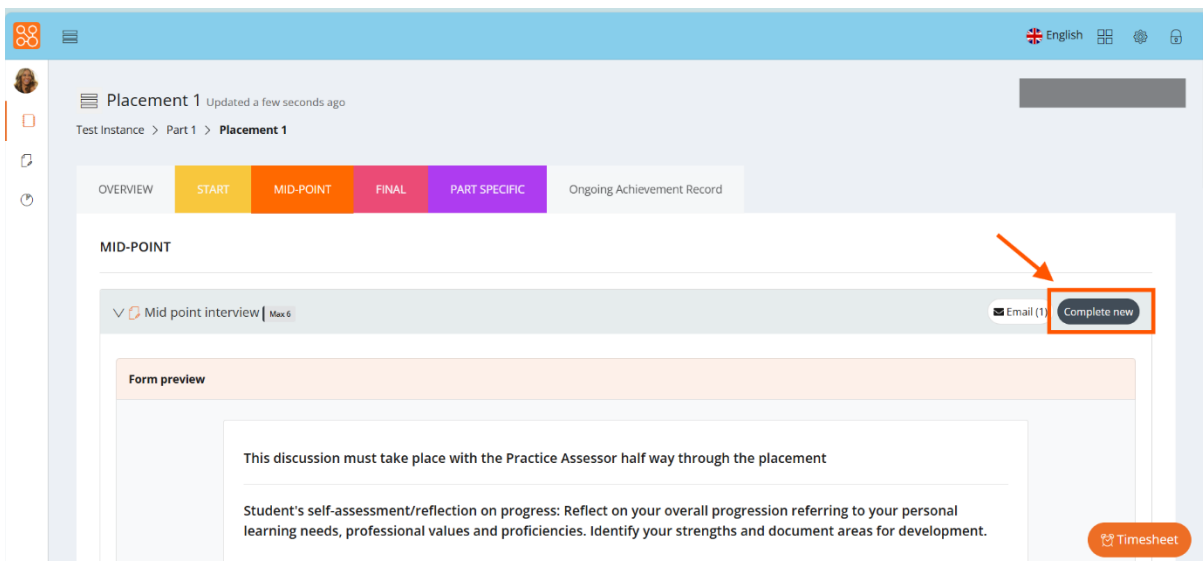


As good practice, you can click the **Save** button every so often whilst completing the draft form, so you always have a saved draft, after you've re-opened it.



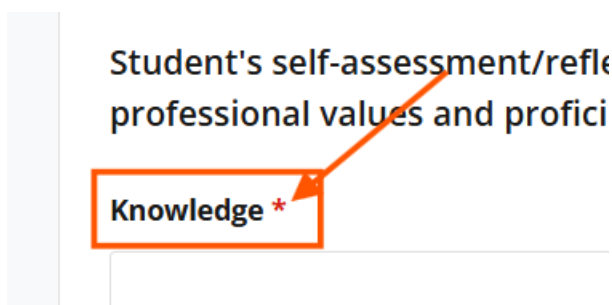
Completing a form with Email Sign Off

To complete a form, click on the **Complete New** button on the form. This will create a brand new draft.



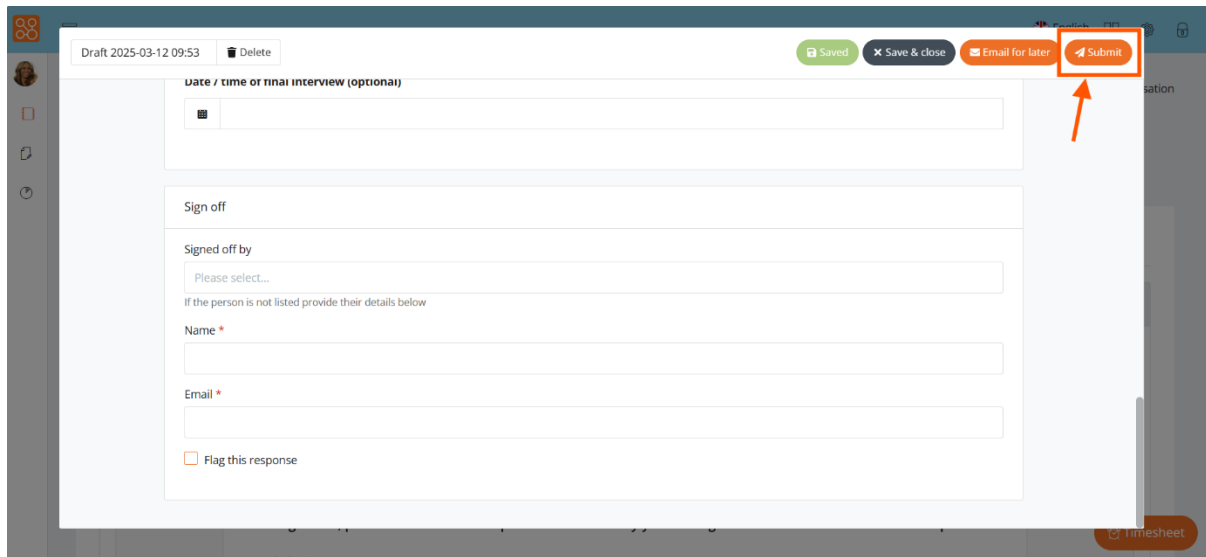
Fill out the form and complete all of the relevant sections.

Please note: Any form sections that are marked with a red star are mandatory and will need to be completed in order for the form to be submitted. If these are not completed, you will receive an error when attempting to submit the form.



Once you've done this, you'll need to get a practice staff member to sign the form off before this is submitted and they'll need to add their information into the **Sign Off** section at the bottom of the form.

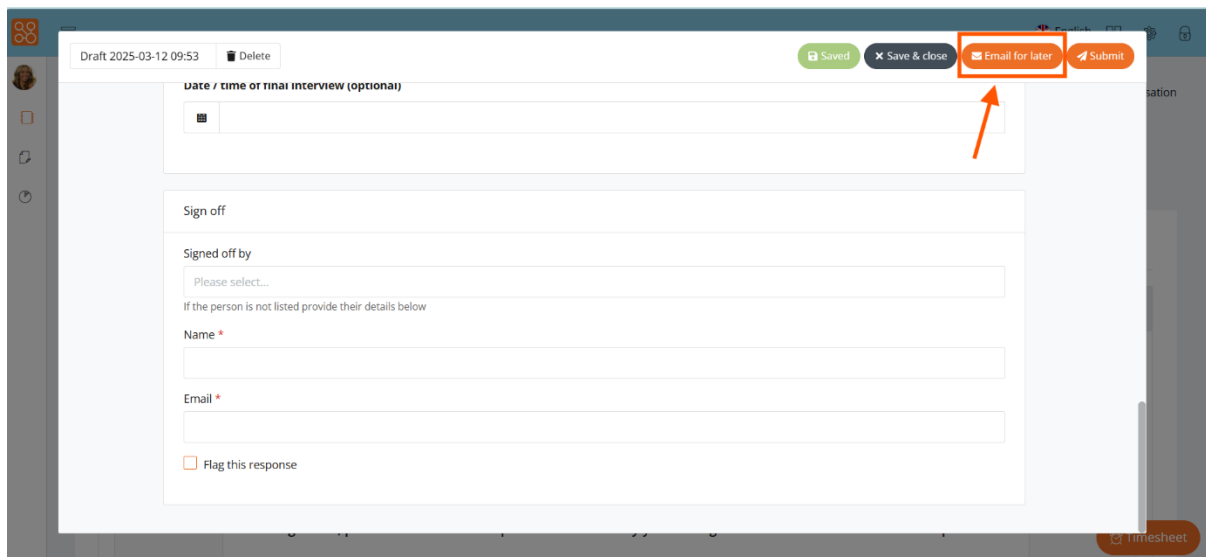
Once this has been done by a practice staff member, click on the **Submit** button (the last button in the top right hand corner of the pop up screen).



The screenshot shows a form titled "Draft 2025-03-12 09:53" with a "Delete" button. The form has a "Date / time of final interview (optional)" field. Below this is a "Sign off" section with a "Signed off by" dropdown menu (currently showing "Please select...") and a note: "If the person is not listed provide their details below". There are fields for "Name *" and "Email *", and a checkbox for "Flag this response". In the top right corner, there are four buttons: "Saved", "Save & close", "Email for later", and "Submit". An orange arrow points to the "Submit" button.

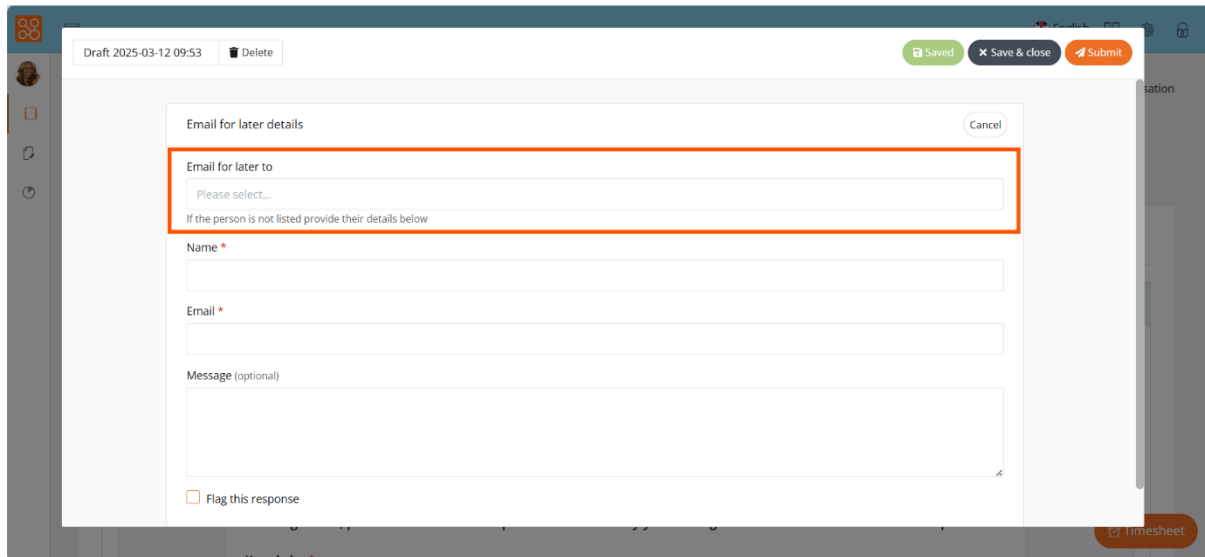
Completing a form using Email for Later

Do all of the above steps but instead of filling out the **Sign Off** section, you'll need to click on the **Email for Later** button (the third button in the top right hand corner of the pop up screen).



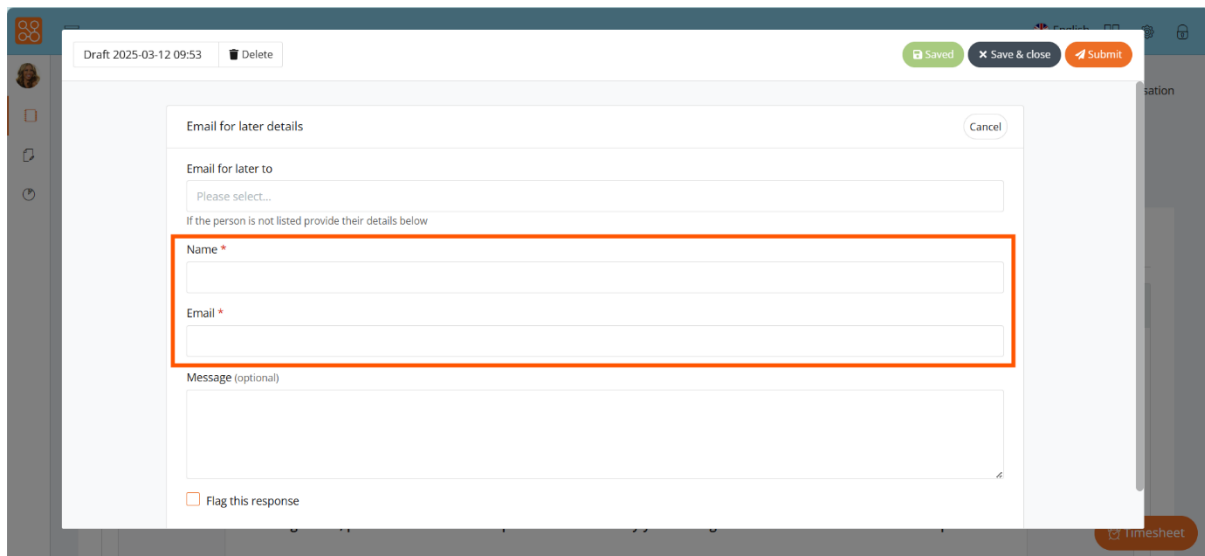
The screenshot shows the same form as above. In this version, an orange arrow points to the "Email for later" button in the top right corner, which is highlighted with an orange box.

You will need to add the information of who you're going to send this completed form to in this section and you can do this by either typing in the name of the person and selecting them from the list.

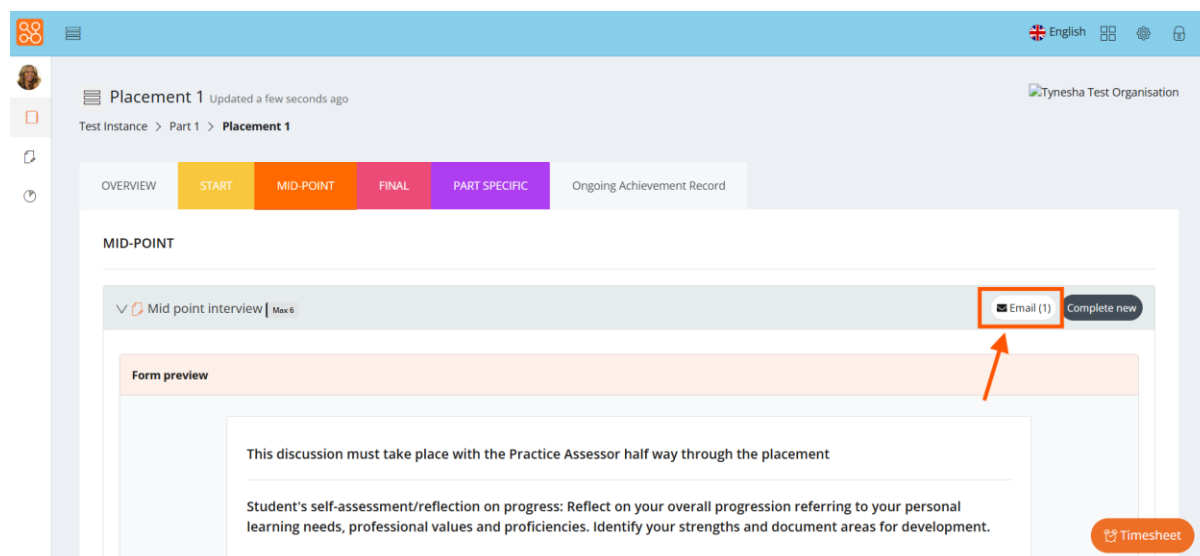


Or you can enter their full name and email address in the section below this.

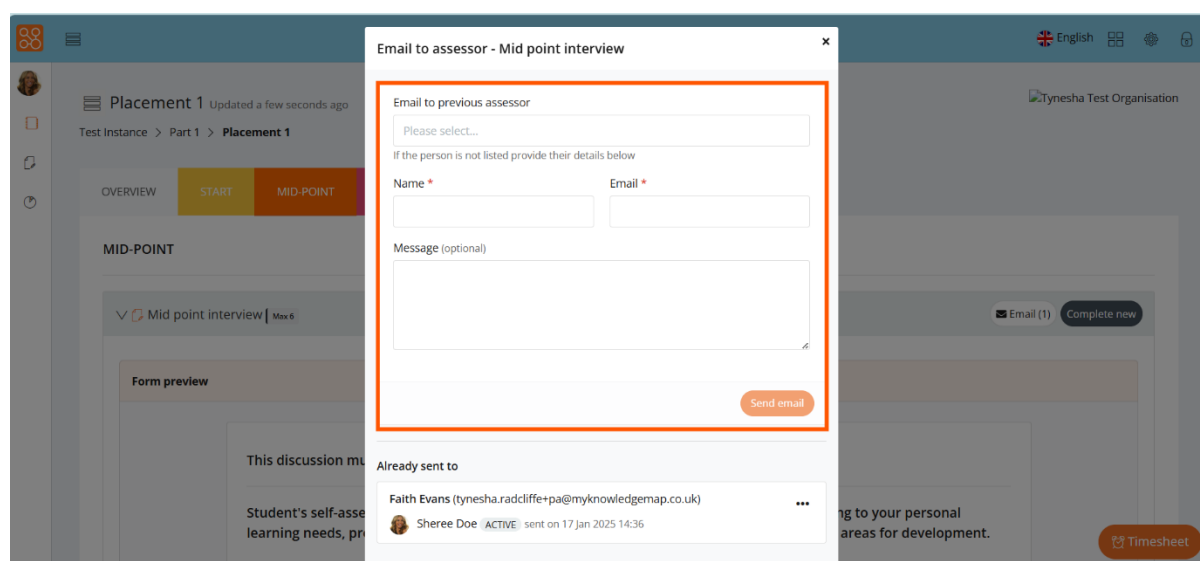
Please note: Adding a message is optional and doesn't need to be completed in order to email the form.



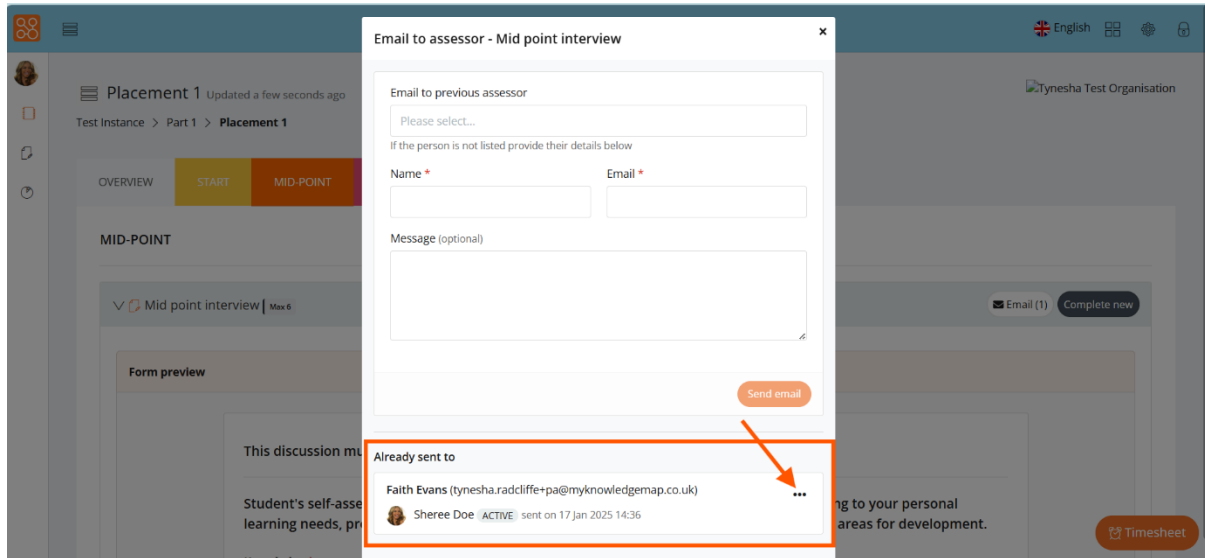
Once you've done this, click on the **Submit** button and this will send an email to this staff member, which you can view by clicking on the **Email** button that appears on the left hand side of the **Complete New** button.



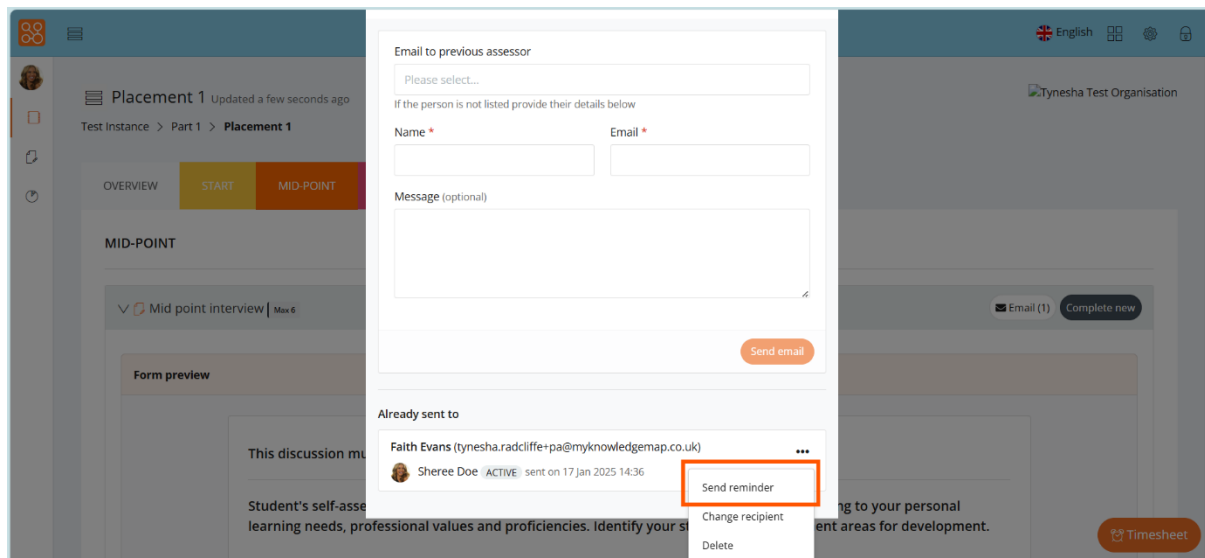
Clicking on the **Email** button will bring up a pop up screen and will give you the option to either send the form out to a different person, using the pre-populated selection option or adding their name and email address.



Or the option to **send a reminder** to the staff member you've already sent it to. To do this, click on the 3 horizontal dots inside the box underneath the "Already sent to" section.



Select **Send reminder** which will send another email to the staff member as a reminder to complete the form.



Deleting a draft form

If at any point, you would like to delete a draft you've created, you can press the **Delete** button whilst inside of the draft form.

Please note: We strongly advise that you thoroughly go through the draft and create a copy of the information inside of the draft before deleting this, for example, copying and pasting the information into a word document or notepad.

