

Each time you initiate a form, you'll get an email saying you have a "new slate." We've asked AirSlate to add a feature turning this off.

AirSlate Guide

Send Forms & Check Form Status

Most forms are accessed directly from your AirSlate account, including treatment plans and incident reports. A few forms are available on the tablets, which are those that are quickest to complete while with a client. Please remember that Four Points emails added to forms must end in **@fourpointsc.com**.

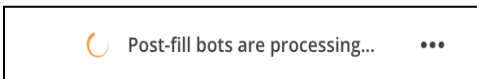
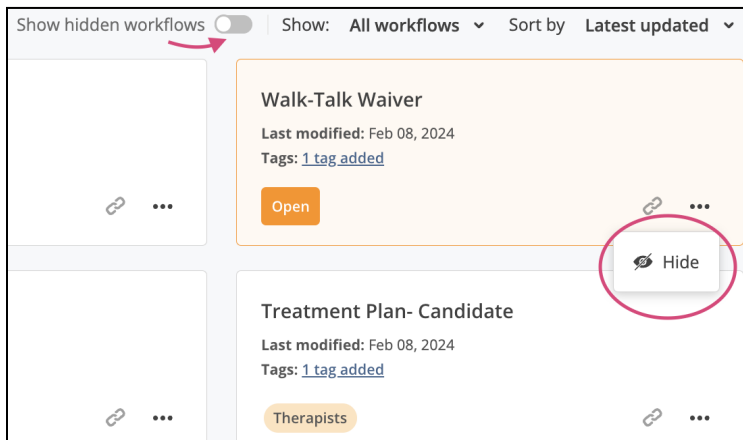
TABLET	AIRSLATE ACCOUNT
<p>Available forms:</p> <ul style="list-style-type: none">Intake B versionsWalk/talk waiverROI & Revoke ROI	<p>All forms available</p> <ul style="list-style-type: none">+ Send reminders+ Check status after sending

Send Forms

Choose Workflows on the left menu. The next screen will show available forms. You can hide forms you don't use.

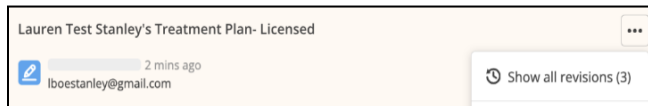
To send a form, hover over the Therapists label and click Open. On the next page, click Run Workflow.

A page will open to a spinning gear and text about bots. Ignore this and wait until "Fill Out" appears. Click Fill Out and proceed with completing the form.

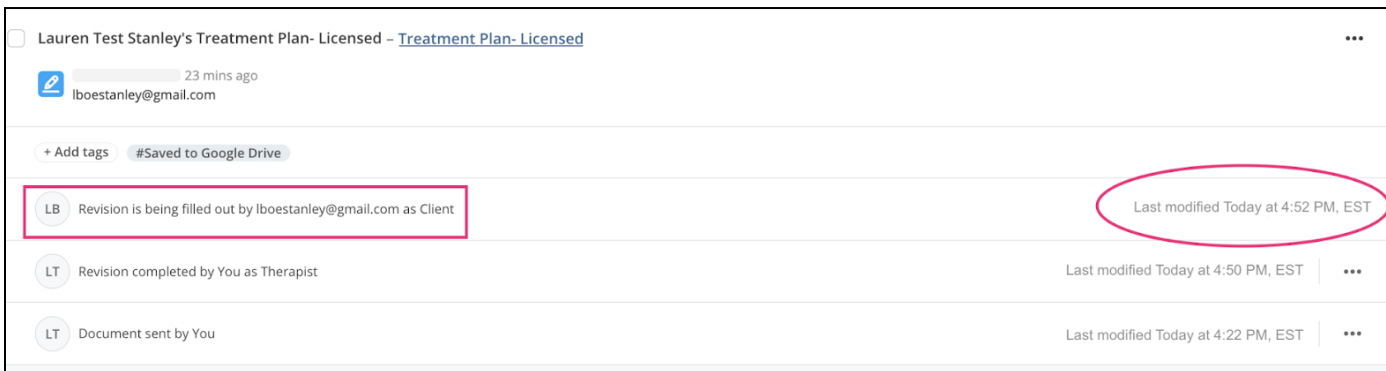


Check Form Status

Go to your inbox and scroll through the list to find the correct document. (Or click Workflows and select the form; the list of sent documents will only include this particular form.)



Click the three dots and select "Show all revisions" to display activity. The boxed text below says, *Revision is being filled out by lboestanley@gmail.com as Client*. This means the person with that email address received the document and at least opened it by clicking the button in the email. In this case, it was opened at 4:52 PM.



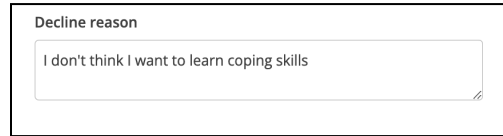
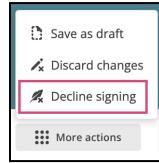
AirSlate Guide

Save Drafts, Decline and Revise Documents

Decline Signing a Document

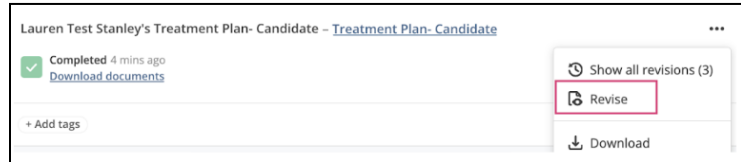
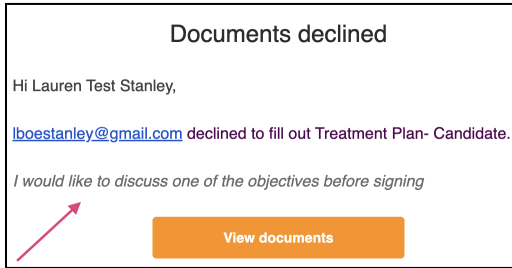
To decline signing a form, click More Actions at the bottom of the page, then click Decline Signing. A field will pop up for adding comments, which allows supervisors to send feedback and allows clients to indicate the reason they chose not to sign.

Declining the document serves another important purpose - it creates the ability to reopen and edit the form.



Revising a Declined Document

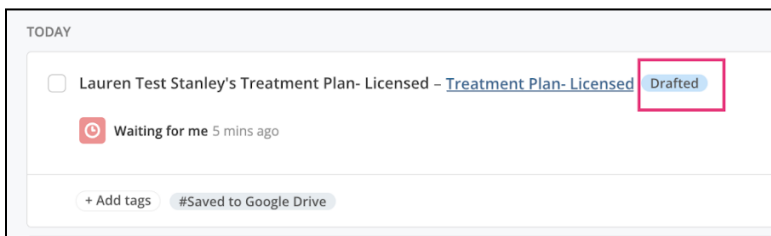
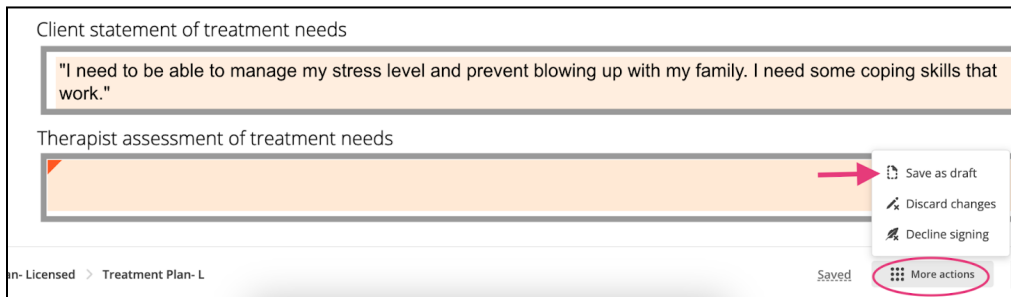
An email alerts the form's owner to its status and provides any comments entered. (The comments field is optional, so the email may not contain comments.) The embedded button leads to a read-only form.



To revise, go back to your AirSlate account and click on your inbox. Several forms in the list may look the same; you will know you have the right form when you find the one with the Revise option (click the 3 dots). Click the button, edit the form, and resend.

Save a Draft

To save your place while working on a form, click More Actions, then Save as Draft.



Return to the form exactly where you left it by reopening it from your inbox. Notice the "Drafted" label indicating the form is saved but incomplete.