Kiosk

Overview

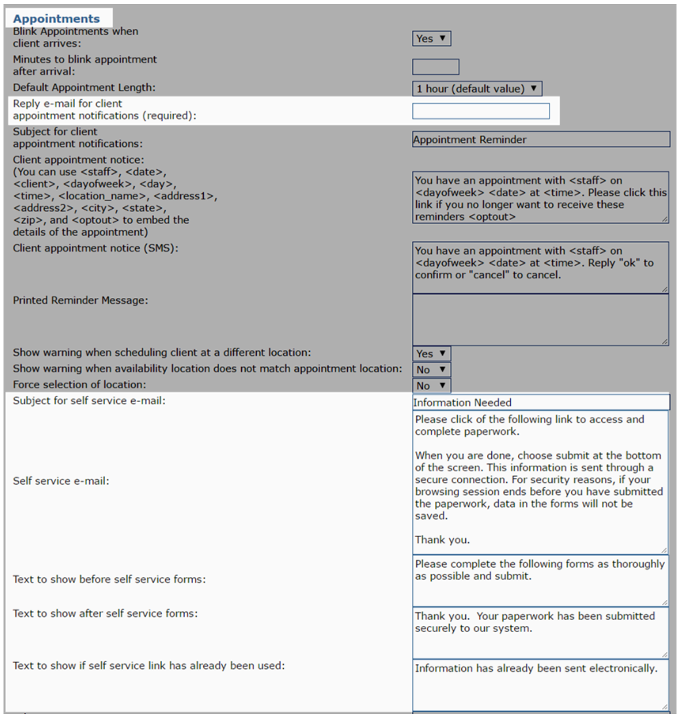
Kiosk is a way to send a clinical document to your client and have them complete it independently. There are several ways to kiosk a clinical document. This article will cover each of these and point you to additional instructions.

Different Ways to Kiosk a Form

- Kiosk a form via Client Portal
- Kiosk a form via client's email
- Put a computer or tablet in Kiosk Mode

Setup Requirements

1. Go to **Settings** Module.
2. Click **Setup** tab.
3. Under the **Appointments** section complete the following fields (examples below)
    - **Reply e-mail for client appointment notifications (required):** Enter a valid e-mail address.
    - **Subject for self service e-mail:** Enter the Subject line that should appear when a form is kiosked to a client's email.
    - **Self service e-mail:** Enter the text you would like the e-mail to say when a form is kiosked to a client's email.
    - **Text to show before self service forms:** Enter the text you'd like to appear in the form window when the client clicks on the form link in the email.
    - **Text to show after self service forms:** Enter the text you'd like to appear in the form window when the client submits the form.
    - **Text to show if self service link has already been used:** Enter the text to appear when the client has already used the form link in the email.



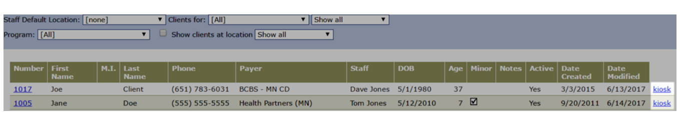
Important Note: When auto-fill settings are enabled in the Chrome browser, this can cause some fields within Procentive to auto-fill with incorrect data, often within clinical documents. Procentive recommends disabling auto-fill settings. This article will explain how to do this in the Chrome browser: Stop Fields from Auto-Filling

Where to Kiosk

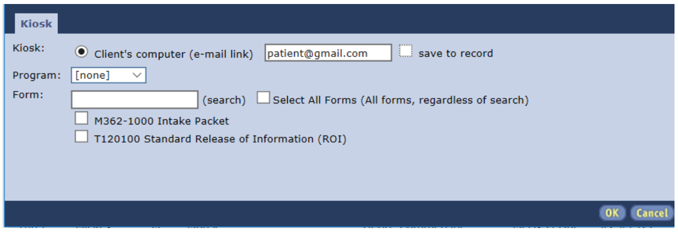
- Clients Module
- Appointments Module
- Clinical/Charting Module

Note: Only Client Type forms will appear as options in the kiosk link found in the Clients Module and the Appointments Module.

Clients Module



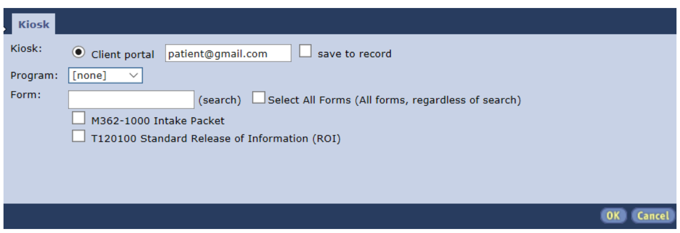
1. Click the **kiosk** link to the far right of the client's line.
   - The form selection window will open.



2. Verify client's email address.
    - The email address will flow in from the client's record in the Client's Module.
    - You can add or update the email address here and click **save to record** to save the email address to the client's record.
3. Check the form you would like to send.
4. Click **OK.**

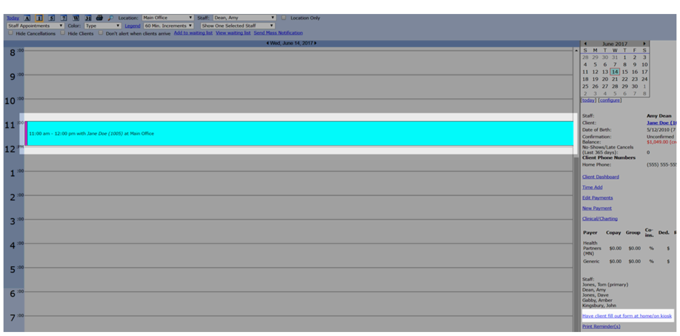
Important Note:

If you have set up your database to send forms to Client Portal, the Kiosk option will say Client portal vs. Client's computer (email link).



Appointments Module

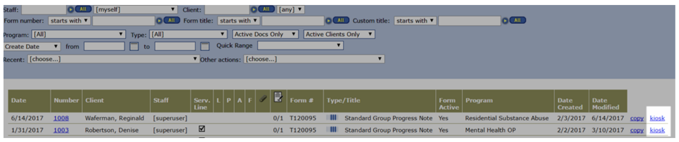
1. Click on an **appointment** to highlight.
    - Client information will appear in the Info Panel to the right.
2. Click **Have client fill out form at home/on kiosk** link.
    - The form selection window will open.
    - If you do not see this option, you may still need to configure your info panel.



3. Verify client's email address.

    - The email address will flow in from the client's record in the Client's Module.
    - You can add or update the email address here and click **save to record** to save the email address to the client's record.
4. Check the form you would like to send.
5. Click **OK.**

Clinical/Charting Module



1. Click the **kiosk** link to the far right of an existing form.
    - The form selection window will open.
2. Verify client's email address.
    - The selected form will be checked.
3. Click **OK.**

Completed Kiosk Forms

Once the clinical document has been completed by your client, you can find this document in the Clinical/Charting Module.

Additional Resources

Track Kiosk Forms