



BERNIEFORMS HOW TO:

*Sending Form Requests &
Reminders in BernieForms*

SENDING FORM REQUESTS IN BERNIEFORMS

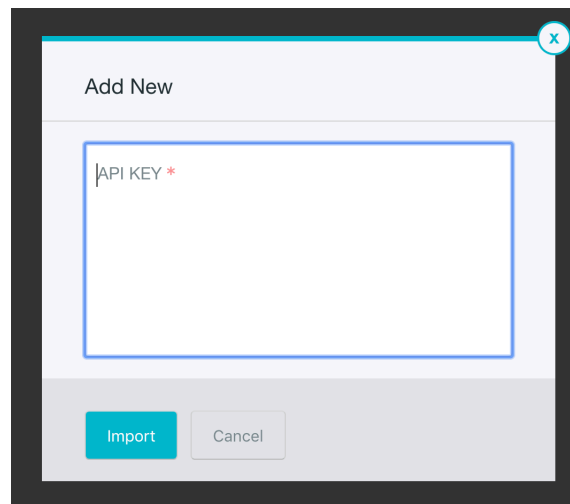
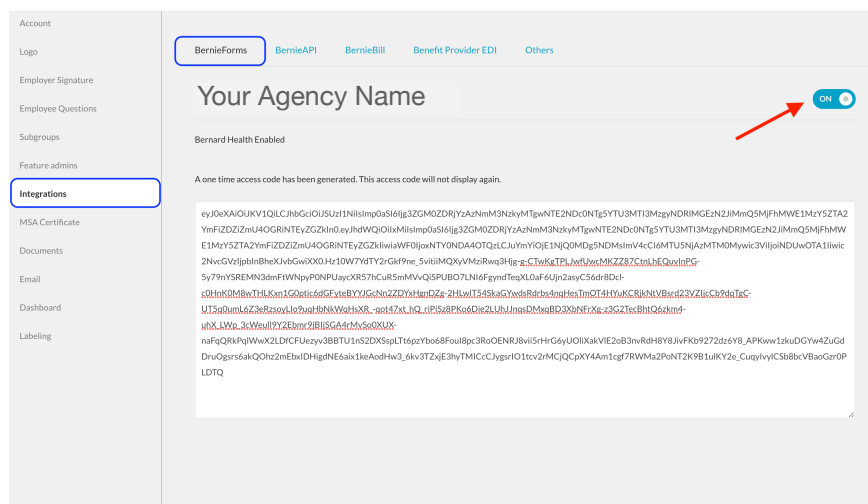
*Uploaded and mapped all of your questionnaires to BernieForms?
Great! Now you're ready to send a form request.*

1 Step 1: Getting ready

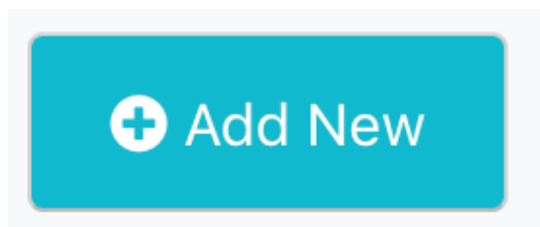
Make sure you've imported all employer groups and the employees that you need to send form requests to. Need a refresher on how to do that? No problem, see below:

If the employer uses BerniePortal, you will need to get the distinct API Key from the employer, which is located in the employer's BerniePortal account (Account > Integrations > BernieForms). You'll be able to generate it by turning the BernieForms toggle on for your agency.

BernieForms will ask you for that API key when you click to import that employer from BerniePortal. Once you have it, you will simply paste it in the field and click Import. The employer will now appear in your BernieForms list.



You also have the option to add an employer manually. Under the Employer List navigation tab, select + Add New and a screen will appear where you can enter the employer's information. Once you click Add, that company will then appear in your BernieForms list.



FIRST NAME *	LAST NAME *
Joe	Smith
JOB TITLE *	EMPLOYER NAME *
HR Administrator	ABC Company
EMAIL *	PHONE *
smith.joe.k.1234@gmail.com	(919) 202-7542
ZIP *	
37206	
Add	Cancel

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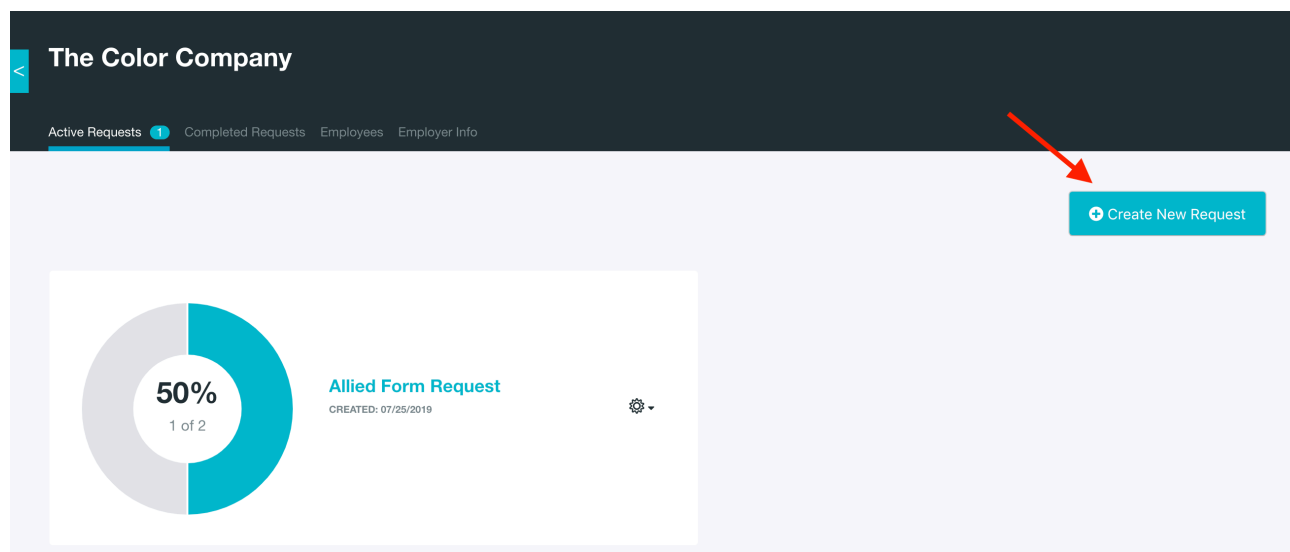
Next, to import employees for that group, you can either select Import using spreadsheet or you can select Add one employee and add employees manually.

If you select to import employees, you will be prompted to download the acceptable template, fill in the employee's information in the template, and then upload it into BernieForms

If you select to add new employees manually, a box will appear prompting you to add their information the same way you added the new employer's information above.

2 Step 2: Create new request

Click into the employer group and select + Create New Request.



You'll then create a unique request name, write a custom message to employees and then add the relevant questionnaire(s).

We'd recommend sticking with the same naming convention for all of your form request names to stay organized. For example: Group Name + Renewal Date.

A screenshot of the 'Create New Request' form in BernieForms. The form has a title 'Create New Request' and a close button in the top right. It contains three main sections: 1. 'REQUEST NAME' with a text input field containing 'Medical Health Form'. 2. 'MESSAGE TO EMPLOYEES' with a text area containing 'Please complete this form by Monday.' and 'Thanks!'. 3. 'QUESTIONNAIRES' with a blue button labeled 'Add a questionnaire'. Below this is a list of three questionnaires: 'UHC App', 'Medova 2019', and 'Aetna AFA Questionnaire', each with an unchecked checkbox. A 'Next' button is partially visible on the right side of the form.

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Finally, you'll select which employees - or group of employees - to send the form request to. You can choose to send the request to (1) all employees; (2) select employees; or (3) all employees except.

Create New Request

REQUEST NAME *
Medical Health Form

MESSAGE TO EMPLOYEES *
Don't forget to complete this form by Friday.

QUESTIONNAIRES *

Add a questionnaire

SEND REQUEST TO

☐ All employees ☒ Select employees ☐ All employees except

Add an employee

Search

3 Step 3: Click send

Upon clicking send, the relevant employees will receive an email notification to complete the requested health questionnaire.

X	From	Subject	Received
<input type="checkbox"/>	BernieForms	New Request From Your Agency Name	5 minutes ago

They will be able to get started on the questionnaire directly from their email by clicking Get Started.



Hi, Chandler

Your Agency Name has requested some paperwork from you. Your Agency Name uses an online system called BernieForms to handle this paperwork. We have reserved an account for this email address, so please click here to complete the sign up for your BernieForms account.

Thanks,
Bernie

Get Started



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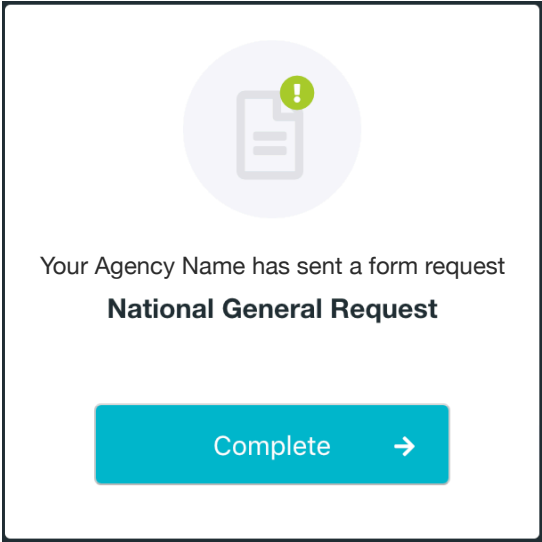
They will then be navigated to the BernieForms login page to enter their login credentials. Once they've logged in to the system, they will see the form request at the top of their homepage.

They will simply select the Complete button to begin.

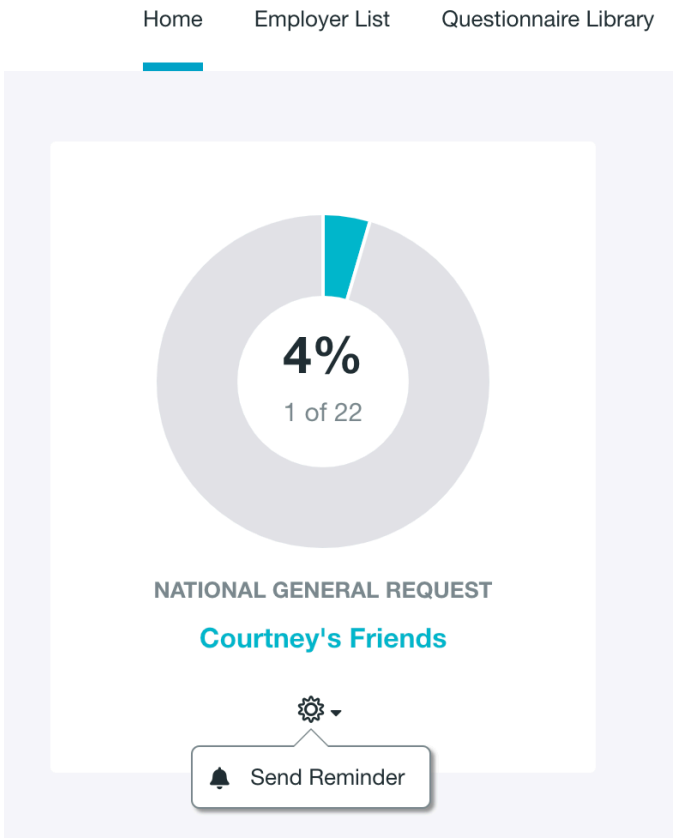
BernieForms will then guide the employee through the form request to completion. Check out this video to see how the form request completion process looks from the employee's perspective.

Sending Reminders in BernieForms

You are also able to send reminders directly to individuals or a group of employees to streamline questionnaire completion in BernieForms. Here's how to do that:

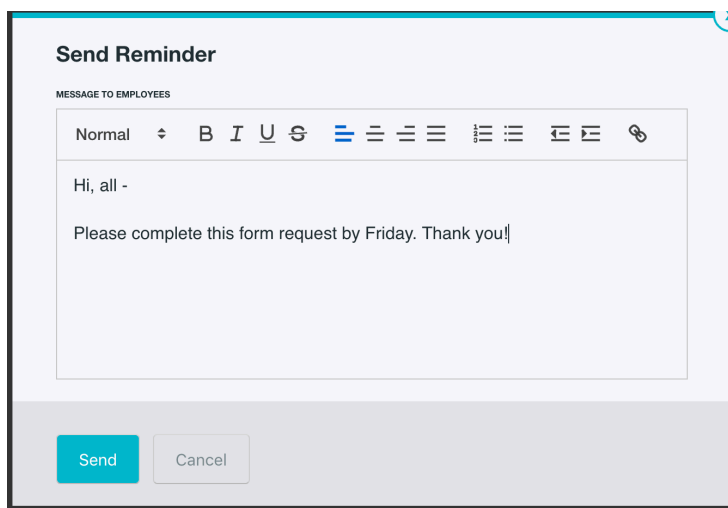


Your homepage will show all active requests. Click on the action gear underneath the employer's name and select Send Reminder.



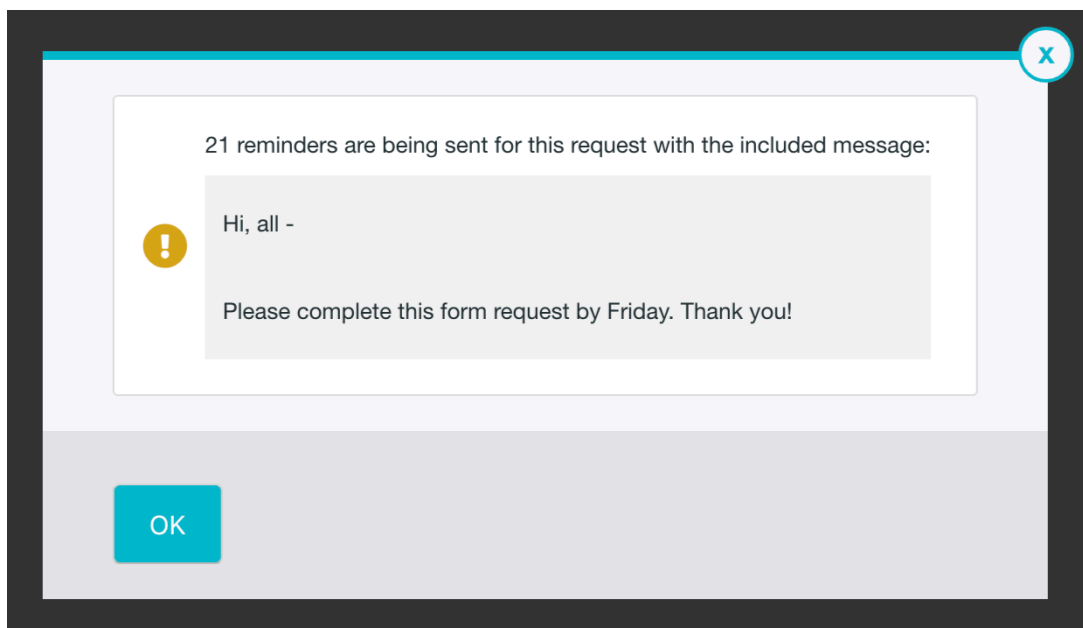
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A box will appear where you can enter a custom message to those employees.



The screenshot shows a 'Send Reminder' dialog box. At the top, it says 'Send Reminder' with a close button (X) in the top right corner. Below that, it says 'MESSAGE TO EMPLOYEES'. There is a text formatting toolbar with options for Normal, Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List, Numbered List, Indent Left, Indent Right, and Link. The message text area contains: 'Hi, all -' followed by 'Please complete this form request by Friday. Thank you!'. At the bottom, there are two buttons: 'Send' (highlighted in blue) and 'Cancel'.

Once you select Send, another box will appear with a copy of your message, as well as how many employees received the reminder.



The screenshot shows a confirmation dialog box. At the top right, there is a close button (X) in a blue circle. The main text says '21 reminders are being sent for this request with the included message:'. Below this, there is a yellow warning icon (exclamation mark in a circle) next to the message text: 'Hi, all -' followed by 'Please complete this form request by Friday. Thank you!'. At the bottom left, there is a blue button labeled 'OK'.

At this point, each reminded employee will receive an email with instructions on how to login to BernieForms to complete the form request.



Have more questions about form requests?
Email BernieForms@bernardhealth.com