



# BERNIEFORMS

## HOW TO:

*Sending Form Requests &  
Reminders in BernieForms*

# SENDING FORM REQUESTS IN BERNIEFORMS

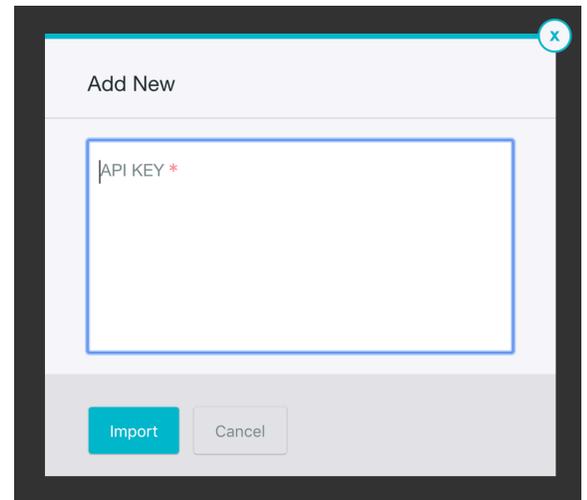
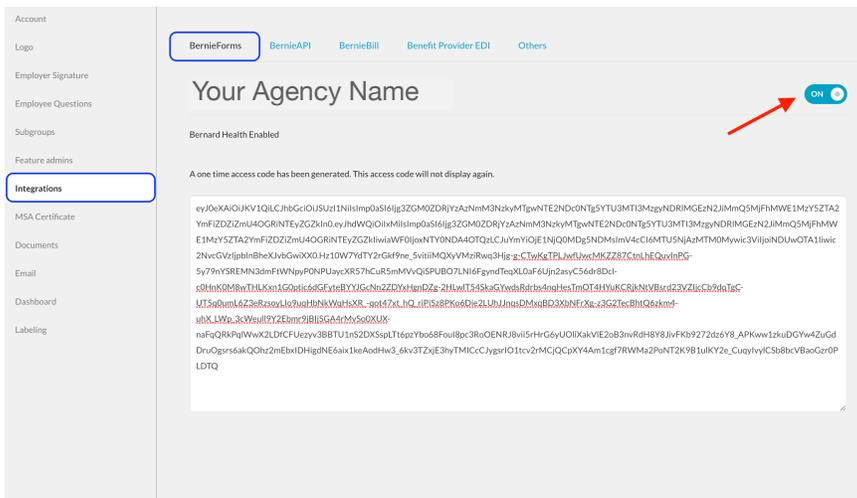
*Uploaded and mapped all of your questionnaires to BernieForms?  
Great! Now you're ready to send a form request.*

## 1 Step 1: Getting ready

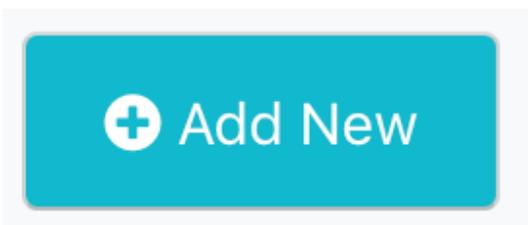
Make sure you've imported all employer groups and the employees that you need to send form requests to. Need a refresher on how to do that? No problem, see below:

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.



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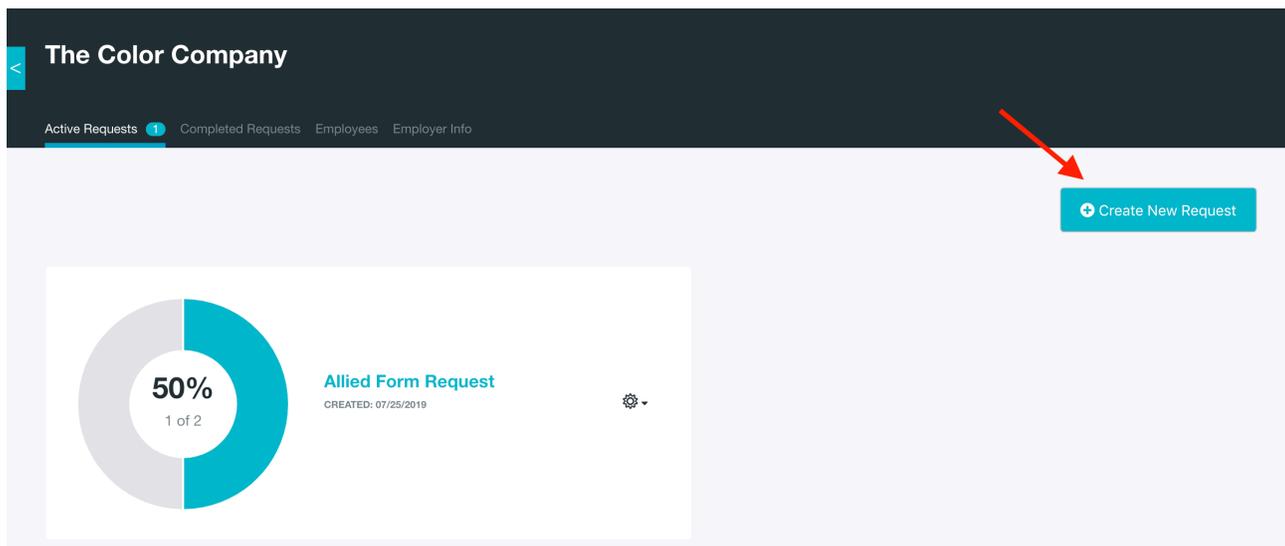
Next, to import employees for that group, you can either select Import using spreadsheet or you can select Add one employee and add employees manually.

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.

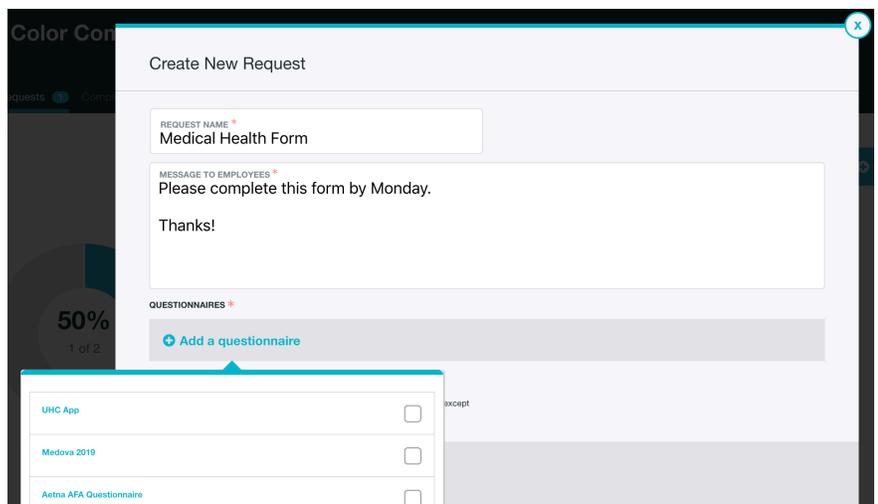
## 2 Step 2: Create new request

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.



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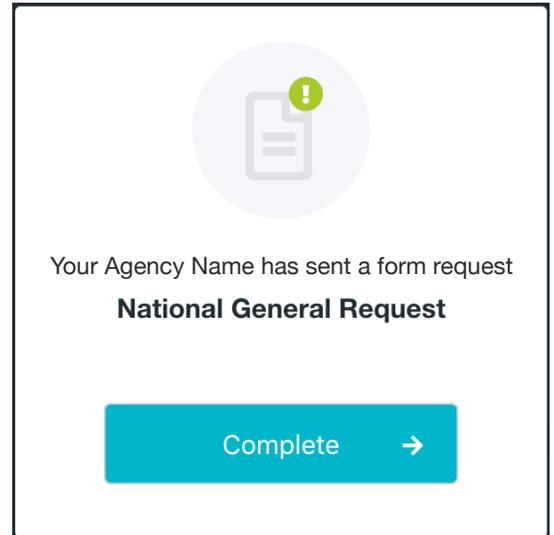
They will then be navigated to the BernieForms login page to enter their login credentials. Once they've logged in to the system, they will see the form request at the top of their homepage.

They will simply select the Complete button to begin.

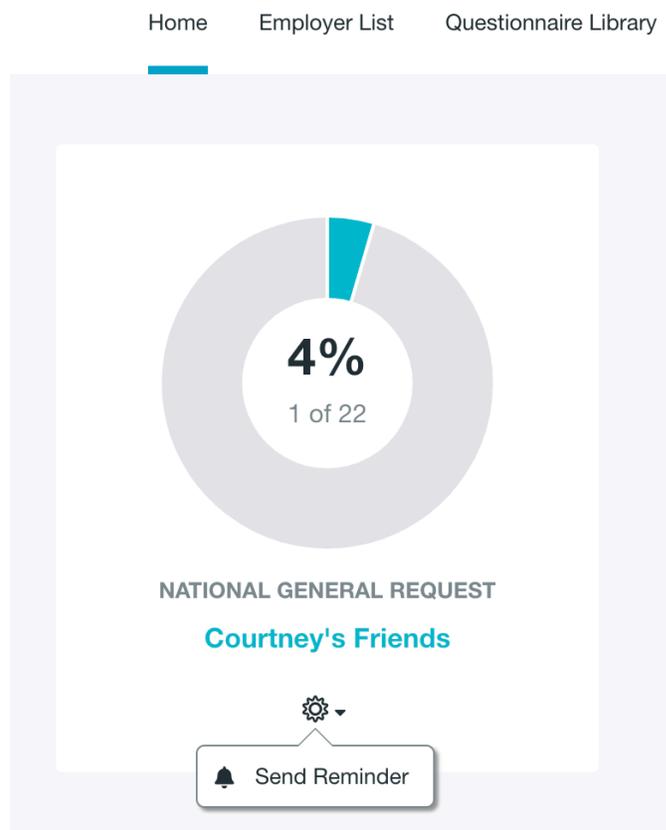
BernieForms will then guide the employee through the form request to completion. Check out this video to see how the form request completion process looks from the employee's perspective.

## 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:

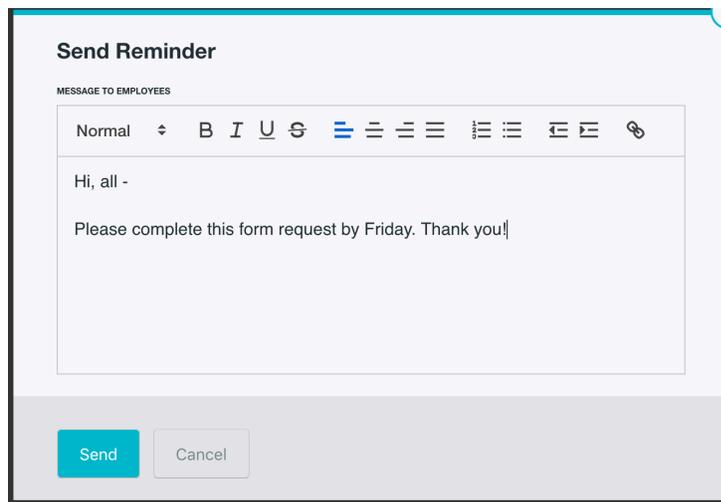


Your homepage will show all active requests. Click on the action gear underneath the employer's name and select Send Reminder.



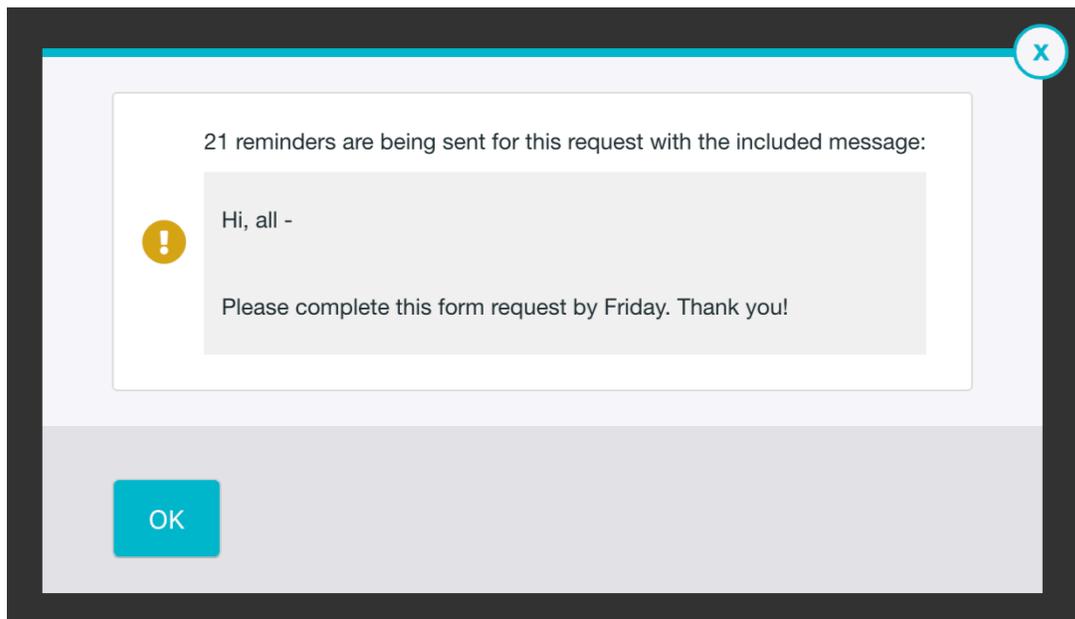
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A box will appear where you can enter a custom message to those employees.



The screenshot shows a 'Send Reminder' dialog box. At the top, it says 'Send Reminder' and 'MESSAGE TO EMPLOYEES'. Below this is a rich text editor with a toolbar containing options for text color, bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, and link. The message text reads: 'Hi, all -' followed by 'Please complete this form request by Friday. Thank you!'. At the bottom of the dialog 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). The main text says '21 reminders are being sent for this request with the included message:'. Below this is a preview of the message: 'Hi, all -' followed by 'Please complete this form request by Friday. Thank you!'. A yellow warning icon is positioned to the left of the message preview. At the bottom left of the dialog is a blue 'OK' button.

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](mailto:BernieForms@bernardhealth.com)