

InfoGrabber Form Presets

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What they are

Presets are named, reusable sets of registration forms. Instead of hand-picking which forms a patient fills out every time, staff can save common combinations once and select them by name when registering a patient.

Where to find them

In the Web InfoGrabber admin screen, click the gear (Settings) icon in the header, then go to the Manage Preset Form Configurations section.

The "Default" configuration

- "Default" is the practice's standard form selection and is always available in the Configuration dropdown.
- It saves automatically as you change it — there's no Save button for Default.
- "Default" is reserved: it can't be used as the name of a custom preset, and there is only one.

Forms a preset can include:

- Patient Registration
- Insurance Card
- Medical History
- Prescribed Medications
- Pain History
- Consent Forms (all, or a specific set via the Custom Consent Forms option)

Creating a named preset

1. Open Settings → Manage Preset Form Configurations.
2. Click New Preset.
3. Enter a name (e.g., "New Patient," "Recall," "Consult Only").
4. Check the forms to include. To choose specific consent forms, check Custom Consent Forms and select from the list.
5. Click Save.

Editing or deleting a preset

- Select the preset from the Configuration dropdown to load it, make changes, and click Save.
- Use Delete to remove a preset you no longer need.

Using a preset

When registering a patient (or generating a patient registration code), choose the configuration from the Configuration dropdown

to apply that preset's forms.

Good to know

- Presets are shared by all staff in the practice — one person's presets are available to everyone.
- If a selected preset can't be found for some reason, the patient is given the practice's Default forms so registration can still proceed.

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