Rollout Guide: Digital Intake Forms, Tablets & Apps

Excerpts from a full implementation guide for moving locations from paper intake forms to digital forms on secured tablets, with separate apps for front-desk and service staff.

Audience: Location owners, managers, front-desk teams, and service providers

Purpose: Launch a new digital workflow with role-based training, a staged rollout, and fewer support tickets

Format: Tabbed guide (~40 pages) with FAQs, role-based how-tos, a rollout timeline, and 5 appendices; 3 excerpts shown

Real document, anonymized: brand, vendor, and people names replaced; links and prices removed; lightly trimmed for length.

What to notice

- Why before how: the guide opens with the security and client-experience reasons for the change, not the button clicks.
- A dated, step-by-step rollout puts training and testing before go-live, including role-play with the team.
- It teaches locations how to get good support: what details to include, where to send each kind of issue, and how to treat the person helping them.

From the cover: “Please keep in mind that we take feedback into account, so things change over time. We do our best to keep our guides up-to-date, but some wording, screens, and other examples may look a little different. If you find that it’s drastically different, please send a ticket with a link to this page, and the Support Center will review and update as soon as possible.”

Excerpt A · Why do we need tablets?

Security

- Device-management software limits outside app usage (social media, entertainment, or other personal apps), keeping staff usage focused on business needs.
- It also helps protect guests’ PII (personally identifiable information), a requirement for PCI compliance.
- Keeping guest data off staff’s personal devices reduces the risk of PCI non-compliance as well as the risk of data being used for personal purposes (e.g., contacting clients outside the business).
- Managing intake forms digitally prevents PII from being stored through an unsecured method (paper, scanning, then shredding).

Core procedures

- Intake forms must be reviewed by the service provider through the Team App, and the provider must sign to indicate they’re aware of contraindications. The Team App is the only way to obtain provider sign-off.
- Service notes are much easier to enter through the Team App. An automated form guides the provider through each service and creates the note in the format needed for reporting.
- The Intake Forms App lets in-location guests complete the form without front-desk data entry, scanning, shredding, or document storage. (It will save you money on paper, too!)

Excerpt B · Implementation steps & timeline

Step	Action	When
1	Review this guide	At least 3 weeks before Automation Live Date
2	Purchase, set up and install tablets	At least 3 weeks before Automation Live Date
3	Learn digital form operations	2 weeks before Automation Live Date
4	Set up and learn the Team App	2 weeks before Automation Live Date
5	Train staff	1–2 weeks before Automation Live Date
6	Final checks and testing	1–2 days before and after go-live

- Each location has two rollout dates: one for the dashboard module and one for the automations. The dashboard activates about two weeks early so you and your staff can test and get familiar with the system before automations begin.
- Between the two dates, you are encouraged to send test forms to your staff, to better understand the process.
- Train Your Staff: it is strongly recommended that you have team members try out the digital intake form themselves, so they can understand the guest experience. Then role-play the new process with the tablets.

Excerpt C · Tips for the best support results

When should I contact the software vendor vs. the Support Center?

- Bugs: reach out to the vendor if you have referred to documentation that states that something should work in one way, and it is not working in that way. They can check logs and back-end data and involve developers if needed.
- Training, feedback, questions: if you're having trouble understanding the guidance, want to share feedback about how something should work, or have questions, contact the Support Center through the Help Center.

To troubleshoot, any support team will typically need to recreate the problem themselves. It is critical to provide specific examples of:

- Guest or staff profile: name and email address
- Who was logged in
- Which system or app was being used
- What happened and what should have happened
- What you were doing just before the error
- Whether this happened once or is recurring
- Whether it affects one record or all records; include specific examples
- Location name and site ID
- Approximate date and time
- Screenshots or videos showing the full screen

Finally, a gentle reminder that the person on the other end is there to help you! You might be frustrated, and Support wants to partner with you to find a solution. "Hello," "please," "thank you," and other niceties often make a world of difference with support reps!