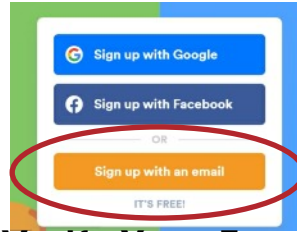


# Creating Your Health Assessment

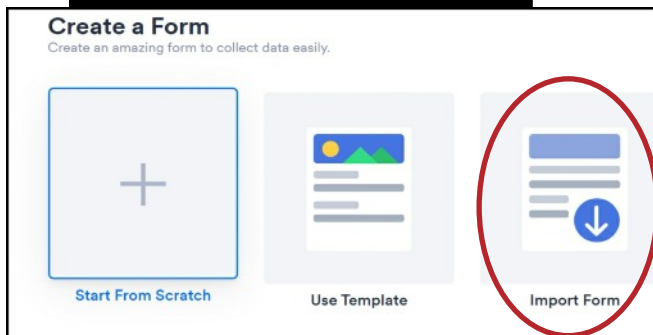
- Go to [Jotform.com](https://jotform.com)
  - ♦ Click on **Sign up with Email**
  - ♦ They will send you an email
  - ♦ Go to your email account to **Verify Your Email**
  - ♦ Login to your account.



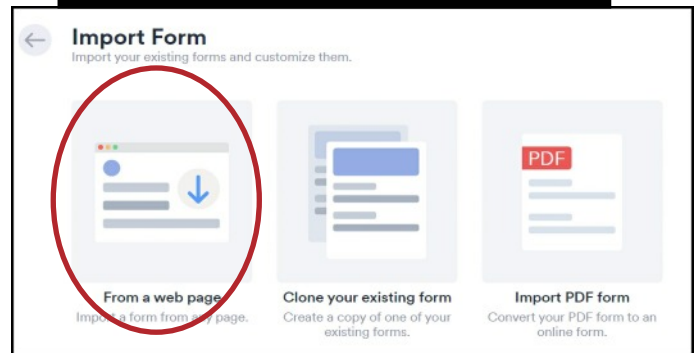
Click on **Create For**



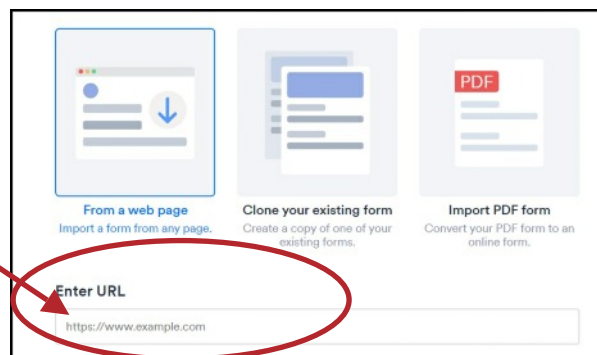
Click on **Import Form**



Click on **From a Web Page**



Enter the **URL**  
From below

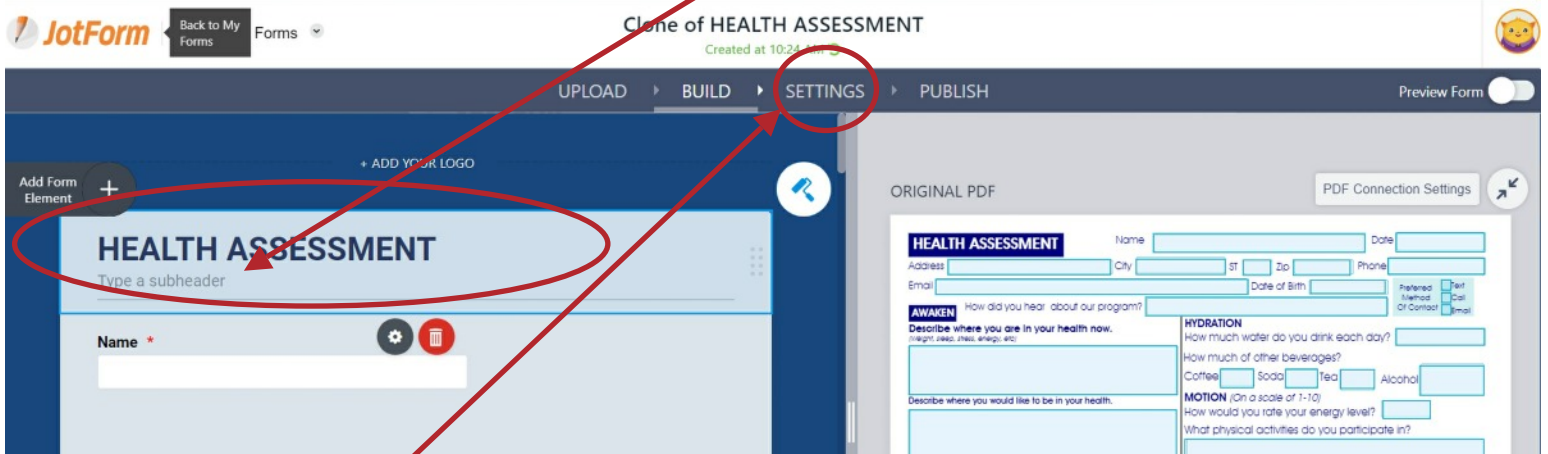


Here is the URL you will need!

- **DO NOT SEND THIS LINK TO YOUR CLIENTS!**
- It is only for the purpose of creating your personal link
- Health Assessment: <https://form.jotform.com/211195047922151>
- Generic Health Assessment: <https://form.jotform.com/210387773676165>
  - ♦ I use this one for new Coaches for their **first 5 clients**
  - ♦ There is a place to enter their **Health Coaches Name**
  - ♦ **This will come back to you** so you are sure to assist them with their first 5 clients.
- When your coach is ready...send them these instructions to create their own forms.

If you would like to add your name to the form:

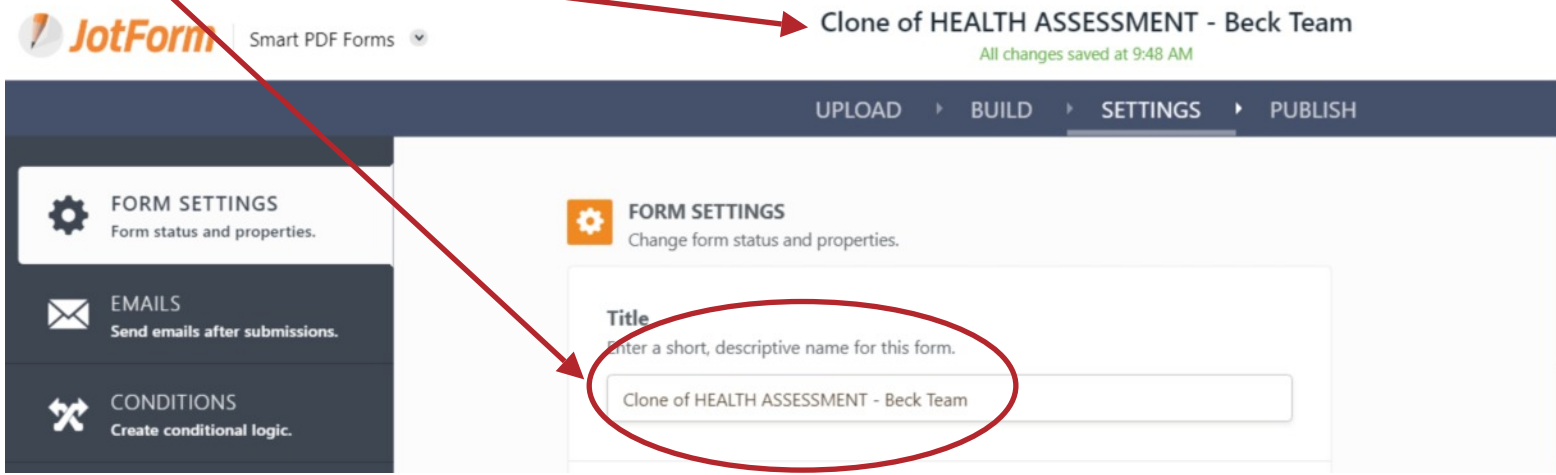
- Click on the "Health Assessment" box
- Add your name where it says "Type a subheader"



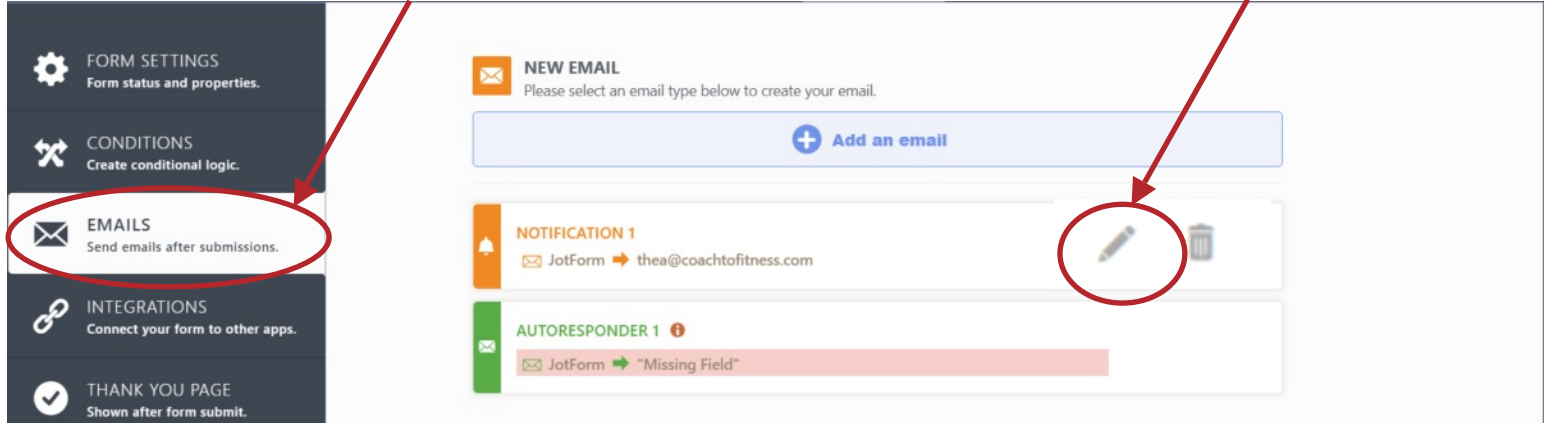
Next...Click on "Settings"

Change Title Of Form:

- Remove the words "Clone of" and "BeckTeam"
- Verify that it is changed on top



Next...Click on "Emails" - Then Click on the edit pencil in the "Notification 1 box"



NOTIFICATION 1  
Receive an email when someone fills your form.

EMAIL	RECIPIENTS	ADVANCED
<b>Send on Edit</b> Recipients can get a new email every time the form submission is edited.		ON
<b>Send Uploads as Attachment</b> By enabling Send Uploads as Attachment option, you will receive submission uploads of your form in your notification email.		OFF
<b>PDF Attachment</b> Select PDF Documents you would like to attach to email.		
<input type="checkbox"/> Select all		
<input checked="" type="checkbox"/> The Original PDF with form submission data.		
<input type="checkbox"/> Default Document		
<input type="checkbox"/> Enable PDF Password		
<b>Hide Empty Fields</b> By enabling Hide Empty Fields option, empty fields won't be visible in received emails.		ON
<b>Update Email</b> While this option is disabled, changes on the form will not affect the email content.		ON
<b>Sender Email</b> Users can receive emails using your own SMTP server instead of JotForm's servers.		
noreply@jotform.com		

TEST EMAIL      SAVE

Click on "ADVANCED"

Make certain the "PDF Attachment" is ON

And

"Original PDF" box is checked

Then Click "SAVE"

Next...Click on "Publish"

HEALTH ASSESSMENT  
All changes saved at 10:41 AM

UPLOAD   BUILD   SETTINGS   PUBLISH

**QUICK SHARE**  
Direct form link and social share.

**EMBED**  
Various webpage embed options.

**ASSIGN FORM**  
Assign your forms to others.

**EMAIL**  
Reminders and instant changes

**DIRECT LINK OF YOUR FORM**  
Your form is securely published and ready to use at this address.

**LINK TO SHARE**   Public Form

<https://form.jotform.com/216394823964169>

COPY LINK

**Your Personal Link:**

- The link that shows up in this box is your personal link.
- Copy it and save it in a place that is accessible from all of your devices.

All you need to do is copy and paste the link. You do not need to invite them from the JotForm website! It can be filled out on any device. **Test it by filling it out yourself before you send it out to potential clients.**

# How Do I Use the Health Assessment?

It's as easy as this:

For someone asking questions or showing interest:

"I know you've been curious about the program I've had success on. I'm going to text you a link for our Health Assessment. It's easy to fill out on your phone! Just hit the submit button at the end and it will come directly to me. I'll look it over to make sure this is a good fit for you before we chat!"

Approach out of concern for their Health:

"You shared with me that you are struggling with Type 2 Diabetes. I want you to know that many clients on our program are able to reduce or eliminate their medications! I'll send you over a Health Assessment that will help me to determine if this would be a good fit for you. There is no obligation at all!"

A lead from OPTAVIA or a Referral:

"I'm so glad that you're interested in learning more about our program. Here is a Health Assessment that will help me know what your goals are. Once you submit it, we'll connect on a quick call to answer any questions you have and see if this program is a good fit for you."

When you receive the email from JotForm:

- Print the attachment on the back of your [Client Profile/Communication Form](#)
- Highlight the things that stand out to you so you are ready to discuss them with your potential client.

When you have your call with your potential client:

- You have all of the information you need to match up our program with their current reality.
- Make certain you dig deeper where needed.
- Compliment them on the things they do well

When you have placed their order\*:

- Insert in binder
- Also insert [Check-in Sheet](#)

You are now set up and ready to support your new client in their journey to health.

\*If They are not ready yet:

- Add them to your Follow-Up Section!

The image shows a screenshot of a 'HEALTH ASSESSMENT' form. At the top, there are fields for Name (Example), Date (02-18-2021), Address (Example), City (Example), State (Ex), Zip (Example), and Phone ((555) 555-5555). Below this is an email field (example@example.com) and a Date of Birth field. The form is divided into several sections: 'AWAKEN' (with sub-sections for 'Describe where you are in your health now' and 'Describe where you would like to be in your health'), 'Medical' (with a 'Please describe WHY you are interested in getting healthy' section), 'DAILY ROUTINE & HABITS' (with sub-sections for 'SLEEP' and 'EATING HABITS'), and 'SURROUNDINGS'. Each section contains multiple-choice questions and text input fields. For example, under 'AWAKEN', there are questions about how much water and other beverages are consumed, energy levels, and physical activities. The 'Medical' section includes checkboxes for various conditions like Diabetes Type 1, High Blood Pressure, and Gout. The 'DAILY ROUTINE & HABITS' section asks about sleep patterns and eating habits. The 'SURROUNDINGS' section asks about the user's support system and environment. The form is designed to be filled out on a phone or tablet.