Sending DAISEY Forms via SMS Messaging or Email
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DAISEY is now capable of sending activity forms directly to families to complete and submit to the family activities page. This guide covers the process for sending forms that have had this feature activated. **At this time, this feature has been activated for the Pre/ Post PAFAS activity form. We will provide notice when additional forms have this feature activated.**

SMS/ Email Form Messaging Workflow

Note: It is always recommended that you inform a family that they should expect a form to be sent to them via SMS message or email, and when. Because the message will appear to come from an unknown, out of state number (850 area code), or an unfamiliar email address, you should inform them when it is forthcoming to avoid the activity form being declined/ignored by the family.

First, search for and select the appropriate recipient of the form by clicking the "Send Family Forms" link under "Family Profiles" in the left navigation menu in DAISEY.

Next, select the form you wish to send to the profile, and enter the phone number and/ or email address of the recipient. The "Expire" field indicates how long this form will be available for the recipient to complete.

Last Name	First Name	Daisey id	Contact Type	Activity Forms	Email Address	Phone	Notes	Expire
Test Profile	SMS	119-21051	caregiver	SMS Test Form(354)		7555555555		2/9/2023

Once the form has been sent, you will be directed to the Message History grid, which will display all forms that have been sent via the Send Forms feature from your organization, listed by Date Sent, the name, DAISEY ID, form sent, email address, and phone number of the recipient, along with the form's status, which will display one of four options:

Status	Action
All ⌄	
caregivereview	✎ 🗋 ✉
completed	✎ 🗋 ✉
review	✎ 🗋 ✉
sent	✎ 🗋 ✉

Sent: The form has been sent to the recipient to complete.

Review: The form is ready for a DAISEY user to review **by clicking the "edit form"** icon. The DAISEY user can then either save/ submit and attach it to the recipient's profile or resend to the caregiver with additional instructions on how to complete the form.

Completed: The form has been reviewed by a DAISEY user and either saved or submitted and attached to the recipient's DAISEY profile.

Caregiver review: The form has been reviewed by a DAISEY user and sent back to the recipient with additional instructions to complete satisfactorily.

What Recipients See When Receiving DAISEY Forms via SMS Messaging or Email

Once a form has been sent from DAISEY, the recipient will receive the following text message or email, depending on the method it is sent:

> **[DAISEY User First & Last Name] is requesting that you complete the form(s) linked below.**
>
> **[Form title]: [Form url link}**
>
> **The links above are available until [Selected expiry date]. Once the link is clicked, you will be required to generate a unique access code. Enter the code and access the form.**

The user will then be prompted to submit a verification code and then be guided to the form on their device's default web browser, where they can complete it and submit it back to DAISEY. **Note that the recipient cannot navigate to any other area in DAISEY or access any data beyond what they enter on the form itself.** Once the form has been sent by the recipient back to DAISEY, its status will be listed as "Review" in the Message History Grid.

Sending Multiple Forms

DAISEY users have the option to send multiple forms to multiple recipients at a time using the Send Family Forms feature. Additional recipients may be added by searching for them in the search box and selecting their profile, which will load them as an additional row on the Send Family Forms grid. Note that if you wish to send multiple forms to the same recipient you will need to look up their name and select it again to load a new row for the additional form. **As always, please ensure that you are sending the right form to the right recipient and phone number.**

Questions? Comments? Contact the DAISEY Helpdesk at daisey.wprs@ku.edu and we will be happy to help!