



Getting Started With Digital Forms Has Never Been Simpler

Build the forms your organization already uses and connect them directly to your data.



What Is Vertex Forms and Why We Built It

Vertex Forms is a custom electronic forms module built specifically for IDD agencies. It allows your organization to create, manage, and submit forms that connect directly to your Vertex case management database, so the information you collect goes exactly where it needs to go, automatically.

Whether your agency is still managing documentation on paper, working with disconnected PDF files, or manually re-entering data from outside referral sources, Vertex Forms gives you a better way. Build the forms your team already knows, connect them to your data, and eliminate the manual processes that have slowed your organization down for too long. No more lost forms. No more double entry. No more chasing down paperwork.

Vertex Forms was built to meet your organization where you are, using the formats you already have, connected to the data you already manage.

Form Types Your Organization Can Build

Vertex Forms is flexible enough to support any documentation workflow your agency requires. Organizations are building:

Consumer Facing

- Consumer intake forms
- Enrollment forms
- Referral forms
- Plans of care and planned management documents
- Periodic summaries

Staff and Internal

- Staff and employee onboarding forms
- Staff training acknowledgment forms
- Internal review and approval forms
- Any other form your organization currently manages on paper or in disconnected digital files

If your organization uses it today, it can be built and improved inside Vertex Forms.

Vertex Forms Features



Handled for you from day one by the Vertex implementation team



Simple, intuitive interface anyone in your organization can use



Built-in approval and review workflows before data is finalized



Unlimited form length and complexity



Multiple field types including text, dropdowns, checkboxes, date pickers, and signature fields



Attach supporting documents directly to any form submission



Multi-step forms and subforms for complex workflows



Fully configurable formatting to match your organization's existing layout and branding



Powered by AI technology for smarter, faster documentation

Ready to Go Paperless?

Vertex Forms is now available. If your organization is ready to eliminate paper, reduce double entry, and bring your documentation workflows into a single connected system, we would love to show you what is possible.