

6 BENEFITS OF VERTEX FORMS

Managing documentation manually takes time your organization doesn't have. Staff re-enter data that was already collected on paper. Forms get filed in the wrong place or not at all. Outside agencies send referrals by fax that someone has to manually key in. Vertex Forms is built to close every one of those gaps.

Build forms that match how your team already works:

Field-for-field, in the exact format your org uses. No retraining required.

Auto-save every form to the right record

No scanning, no filing step. Each submission lands on the correct consumer or staff record.

Push data directly into Case Manager

Completed forms populate your database automatically. No re-entry, no second step.

Update existing records from a submission

Forms can revise what's already in your database automatically. No manual edits required.

Accept submissions from external parties

Outside agencies and referral sources submit directly. No faxing, no calls, no manual entry.

Adjust forms instantly as regulations change

One change, live everywhere. No reprinting, no outdated versions in circulation.

Because Forms connects directly to Case Manager, every submission contributes to the audit trail your organization needs for compliance, state oversight, and funder reporting. Documentation that used to require multiple steps and multiple people now happens automatically in the background.

Talk to our team to learn more about forms, the functionality and how to get started!