

FOR ABA PRACTICES USING GOOGLE WORKSPACE

Intake paperwork, all in one request.

Collect forms, signatures, and documents through a protected link. Caregivers don't need a Google account.

Your team keeps its document review in Google Drive.

01 BUILD THE REQUEST

Select your saved form and approved Drive destination. Then generate the link and separate access code.

For owners, practice managers, and intake coordinators.

The screenshot shows the 'Create request' modal in the PHI Uploader interface. The modal is titled 'Create request' and contains the following fields and options:

- Request title:** ABA intake walkthrough -demo
- Form:** Parent intake packet (selected from a dropdown)
- Drive destination:** Secure intake submissions (selected from a dropdown)
- Drive file prefix:** DEMO-ABA|
- Share destination:** PHI Uploader hosted page (selected with a radio button)

Below the form fields, there is a warning: 'No approved website embeds are configured for this organization.' At the bottom of the modal are two buttons: 'Generate Link' (with a shield icon) and 'Close'.

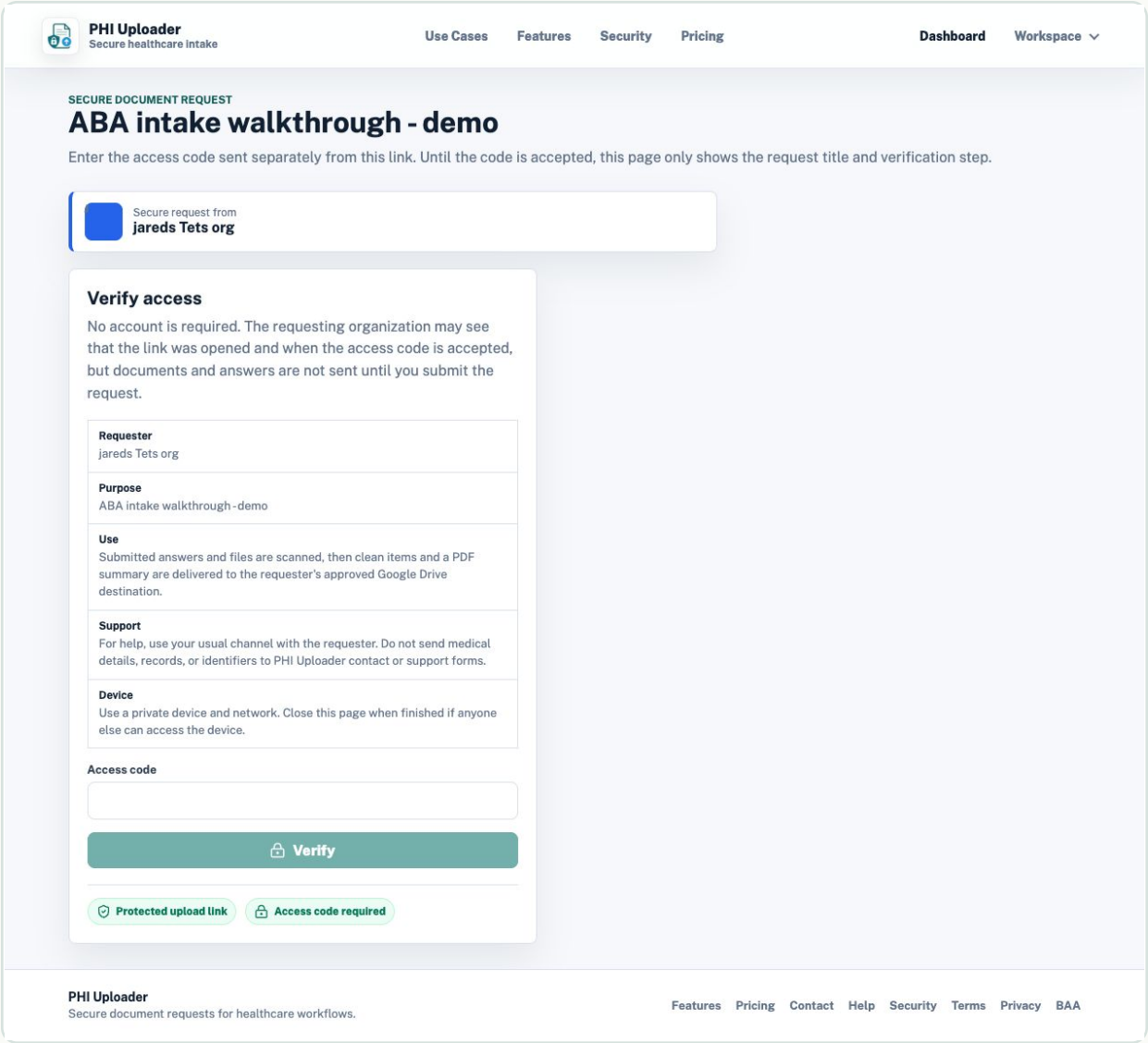
The background shows the 'Document Requests' section of the PHI Uploader dashboard, with a sidebar containing 'Requests' and 'Workspace setup'.

A real request screen using a fictional ABA packet.

02

Give caregivers protected access

Share the request link and access code through separate channels.



The caregiver enters the separately shared code. No Google login or new account is required.

03

Guide answers and signatures

The caregiver follows the packet's questions and completes requested signature fields.



PHI Uploader
Secure healthcare intake

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SECURE DOCUMENT REQUEST

ABA intake walkthrough - demo

Complete this secure request one step at a time.

 Secure request from
jareds Tets org

Step 3 of 7

Required

Caregiver signature

Typed name

Demo Caregiver (fictional)

Draw signature

Use a mouse, trackpad, or touch screen.



× Clear

← Back

→ Next

PHI Uploader
Secure document requests for healthcare workflows.

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This demonstration uses a fictional name and signature. The visible workspace is a test workspace.

04

Collect the requested files

Caregivers attach documents within the same guided packet, then review and submit.



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SECURE DOCUMENT REQUEST

ABA intake walkthrough - demo

Complete this secure request one step at a time.

 Secure request from
jareds Tets org

Step 4 of 7

Required

Caregiver ID

File

Choose File

No file chosen

Uploaded securely.

▼ Reveal filename

DEMO_CAREGIVER_ID.pdf

×

Clear

← Back

→ Next

Caregiver ID uploaded securely and ready to submit.

PHI Uploader
Secure document requests for healthcare workflows.

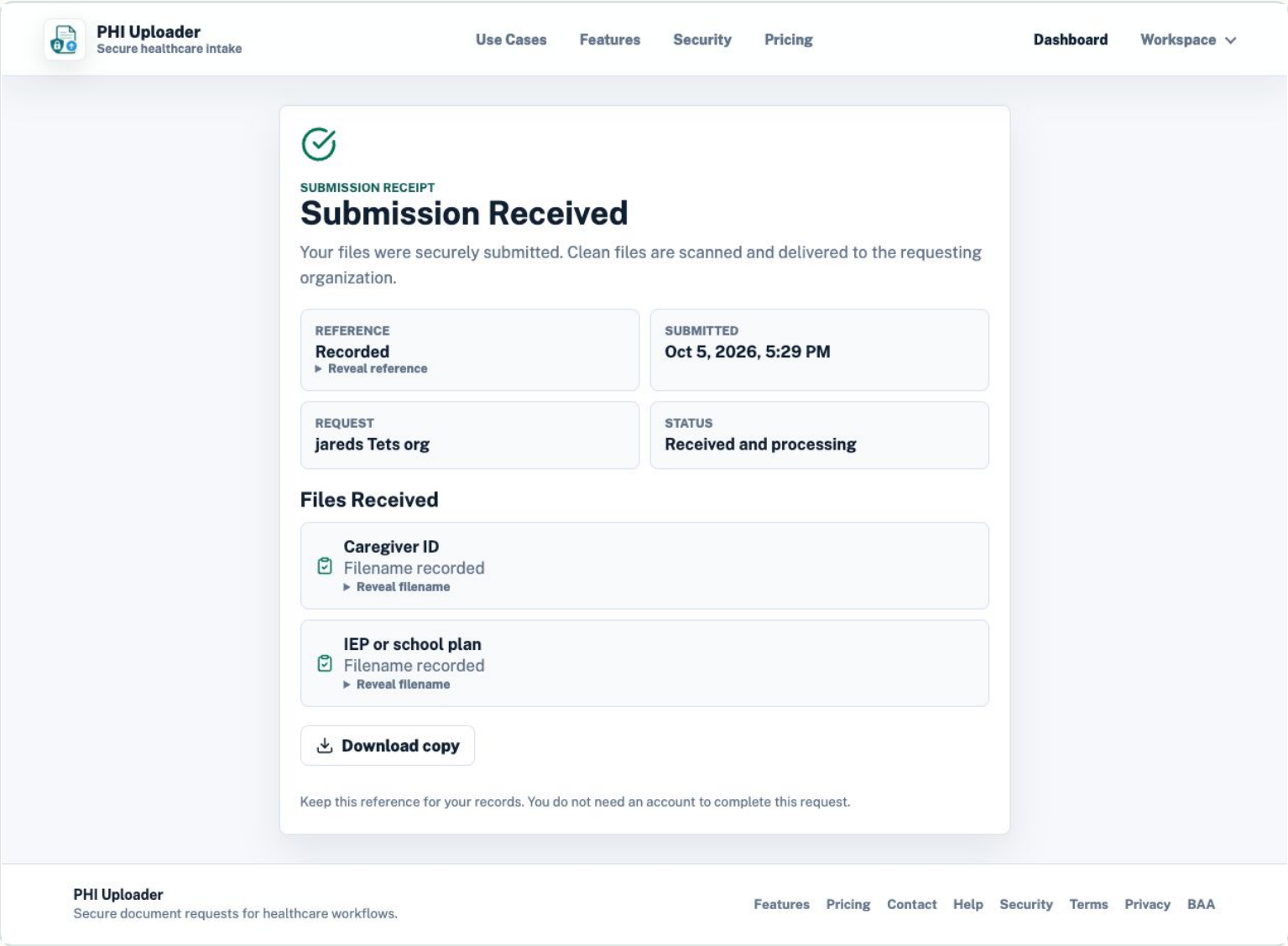
[Features](#) [Pricing](#) [Contact](#) [Help](#) [Security](#) [Terms](#) [Privacy](#) [BAA](#)

A clearly labeled demo document stands in for the records the practice would request.

05

Confirm the submission was received

The receipt acknowledges the submission while processing continues.



Received and processing is a submission state. Staff check completed delivery separately.

06

Check the completed handoff

Uploaded files are scanned. Clean files and a PDF summary go to the approved Drive destination.



PHI Uploader
Secure healthcare intake

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CREATED

10/5/2026, 9:27:22 PM

Processing Timeline

Current operational status for this request, from link creation through delivery and purge.

Request created

Secure upload link generated.

Oct 5, 2026, 9:27 PM

Complete

Link opened

Recipient viewed the request page.

Oct 5, 2026, 9:27 PM

Complete

Access verified

Access code accepted and the request started.

Oct 5, 2026, 9:27 PM

Complete

Submission received

Receipt recorded.

Oct 5, 2026, 9:29 PM

Complete

Files delivered

2 clean files delivered to Drive.

Oct 5, 2026, 9:29 PM

Complete

PDF delivered and answers purged

PDF summary uploaded to Drive and raw answers purged.

Oct 5, 2026, 9:29 PM

Complete

Files

REQUESTED	ORIGINAL FILENAME	DRIVE FILENAME	STATUS	DRIVE
iep	► Reveal original filename	► Reveal Drive filename	delivered	► Reveal Drive file link

Ready for your team's review

This fresh demo request completed the handoff shown in the timeline:

- 2 demo files delivered
- PDF summary uploaded
- Raw answers purged

STAFF VIEW

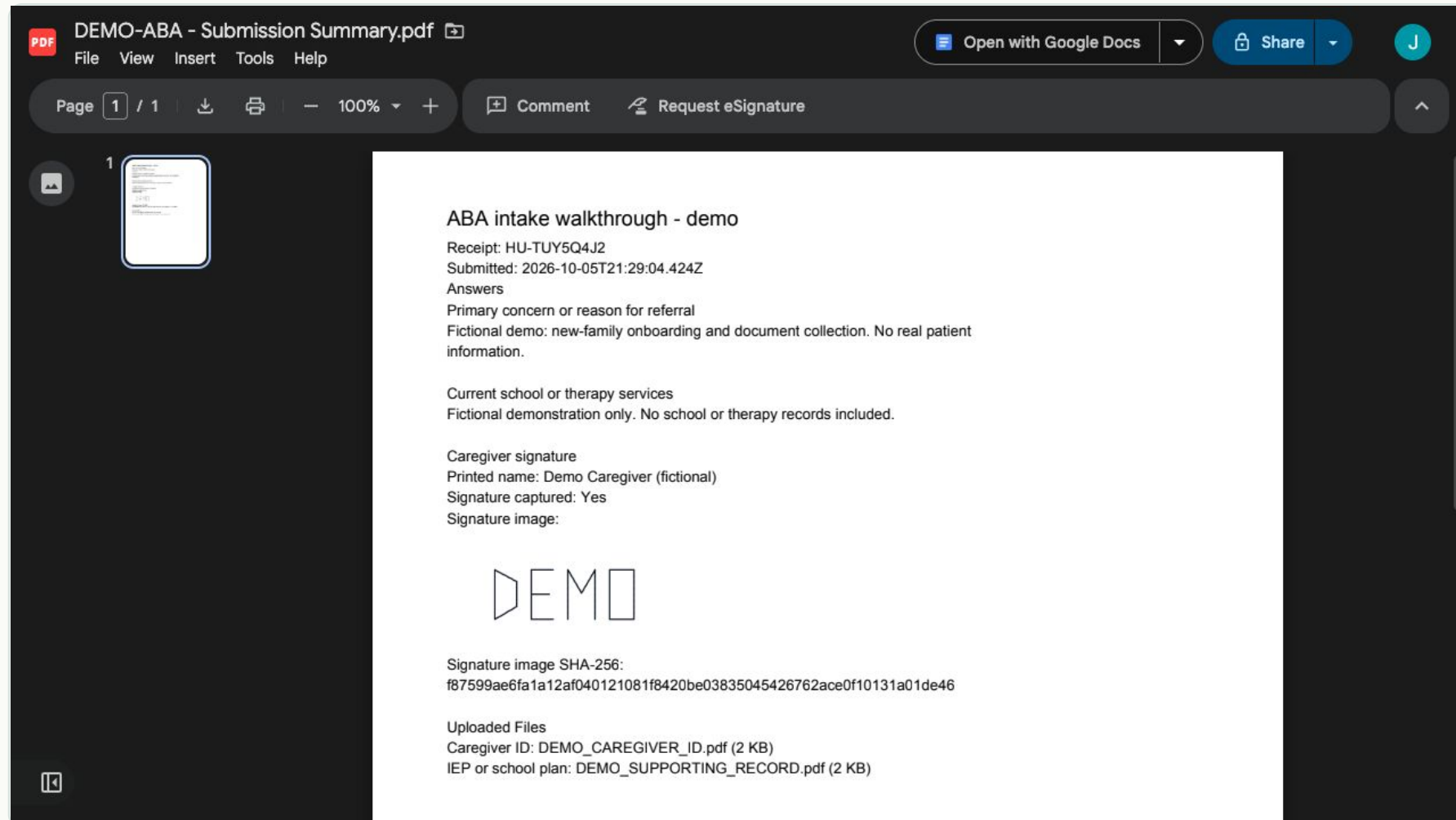
One place to check delivery.

Open delivered files and the summary from the completed request.

07

Open the finished packet in Drive

The generated PDF brings together the fictional answers, captured signature, and uploaded-file list.



Try your first packet

7 days. Up to 10 submissions. No card.

Trial starts after setup and validation.

Professional: \$60/month

Up to 10 staff and 500 requests/month.

[Start free trial at phi-uploader.com](https://phi-uploader.com)