



# Formstack

A no-code workplace productivity platform for secure data collection, workflow automation, document generation, and electronic signatures.

<https://www.formstack.com>

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## Overview

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Formstack is a versatile, no-code workplace productivity platform that helps organizations, particularly those in regulated industries like healthcare and finance, to digitize and automate their business processes. The platform is built around a suite of core products: **Formstack Forms** (an intuitive, drag-and-drop online form builder), **Formstack Documents** (for automated document generation from collected data), **Formstack Sign** (for secure electronic signatures), and **Formstack Workflows** (a visual builder to connect the products and automate processes).

### Key Benefits for Healthcare/Biotech:

**HIPAA Compliance:** Formstack offers an Enterprise-level solution that is compliant with HIPAA and HITECH, including the willingness to sign a Business Associate Agreement (BAA) and providing features like data encryption and access controls for ePHI.

**Workflow Automation:** It streamlines critical healthcare processes such as patient acquisition, patient intake/registration, medical consent forms, patient referrals, and medical invoicing, which can save teams an average of 17 hours per week.

**Data Security:** The platform uses 256-bit SSL, AES-256 data encryption for data at rest, access controls, auditing, and SSO-powered data management.

### Main Capabilities:

**Data Capture:** Build custom, mobile-ready online forms with conditional logic, payment collection, and file uploads.

**Document Automation:** Automatically populate contracts, reports, proposals, and invoices from form data using customizable templates (Word, PDF, Excel).

**E-Signature:** Collect legally binding electronic signatures quickly and securely.

**Integration:** Seamlessly connect data to CRMs, ERPs, and other business systems like Salesforce, Google Suite, and Dropbox.

Formstack serves a wide range of company sizes, from small businesses to large enterprises, and is recognized for its ease of use and robust integration options.

## Key Features

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- No-Code Online Form Builder
- Automated Document Generation
- Electronic Signatures (eSign)
- Workflow Automation
- Conditional Logic
- Secure Payment Collection
- Native Salesforce Integration

## Pricing

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**Model:** subscription

Offers multiple product plans (Forms, Documents, Sign) and a bundled Suite plan. The Forms plan starts at \$83/month (billed annually). Custom pricing is available for the Enterprise plan, which includes HIPAA compliance.

**Starting at:** USD \$83

**Target Company Size:** small, medium, enterprise

## Integrations

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Salesforce, Google Suite, Dropbox, Zapier, Microsoft, HubSpot, PayPal, Stripe, EHR systems (via Intellistack Streamline)

## Compliance & Certifications

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HIPAA, HITECH, PCI Compliance, GDPR, PIPEDA, SOC2

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