;etting Required Forms Based On The Appointment ⁻ype

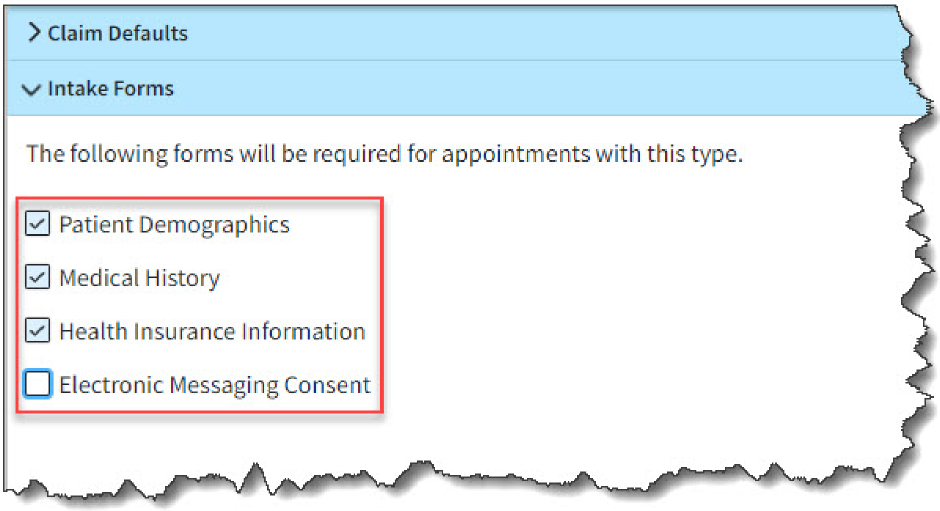
:t Modified on 04/08/2024 8:34 am EDT

'ou can configure which forms are available for specific appointment types (for example: setting new atients to receive certain forms and existing patients to receive others). If no forms are selected for a articular appointment type, all forms will be available by default for that type.

1. Select **Appointments** > **Configuration...** > **Appointments Types**
2. Use the **Show All** button to view all appointment types. Or use the**Search** field to further drill down your search.

   Place a check in the "*Include inactive types*" box to include inactive appointment types in your search results.

3. Select the Appointment Type.
4. Click the **Intake Form**s side panel.
5. Use the checkboxes to set the forms that will be available when creating appointments with this type.



6. Click **Save**. Otherwise, click **Close** if no changes were made.