

Setting Required Forms Based On The Appointment Type

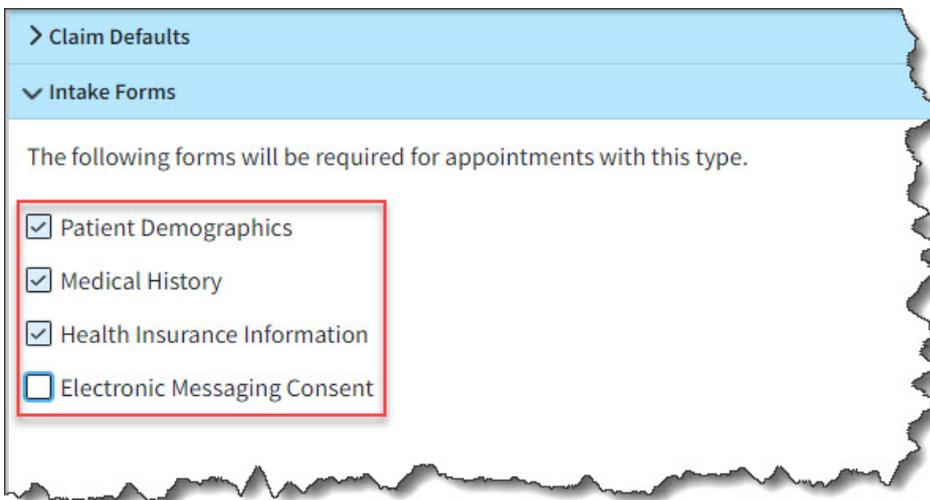
† Modified on 04/08/2024 8:34 am EDT

You can configure which forms are available for specific appointment types (for example: setting new patients to receive certain forms and existing patients to receive others). If no forms are selected for a particular 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 Forms** side panel.
5. Use the checkboxes to set the forms that will be available when creating appointments with this type.



The screenshot shows a configuration panel with a blue header containing a right-pointing chevron and the text "Claim Defaults". Below the header is a section titled "Intake Forms" with a downward-pointing chevron. Underneath, the text reads "The following forms will be required for appointments with this type." A list of four forms follows, each with a checkbox: "Patient Demographics" (checked), "Medical History" (checked), "Health Insurance Information" (checked), and "Electronic Messaging Consent" (unchecked). A red rectangular box highlights the first three checked items.

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