


Send Intake Forms Manually

† Modified on 04/05/2024 2:30 pm EDT

Patient Intake Forms can be sent manually via email or text directly from the Appointment Control section. You can send forms to an individual or multiple patients at once.


 Please be aware that the form will be sent via email or text, depending on whether the settings selected allow for one or both. Also, patients must have opted in to receive text messages before they can receive them.

1. Select **Appointments > Appointment Control**.
2. Enter your **Search Criteria** or Load a Search Filter.
 1. Use the **Appointment Date** drop-down menu to filter by the date or date range of the appointment.
 2. Use the **Resource** drop-down menu to filter the search by a specific resource (doctor, room, etc.)
 3. Use the **Practice** drop-down menu to filter the search by a specific practice (if multiple practices are available).
 4. Use the **Provider** drop-down menu to filter the search by a specific provider (appointments for a specific doctor).
 5. Use the **Facility** drop-down menu to filter the search by a specific Facility (appointments at a different location).
 6. Use the **Office Location** drop-down menu to filter the search by a specific location or office.
 7. Use the **Appointment Status** drop-down menu to filter the search by the status of the appointment (new patient, confirmed, no show, etc.).
 8. Use the **Appointment Type** drop-down menu to filter the search by the appointment type (follow up, new patient, consult, etc.).
 9. Use the **Patient** field to filter the search by the exact patient the appointment is associated with.
10. Select your **Forms Options**:
 1. **Only Show appointments with unsent forms** Check this box to include any appointments with unsent forms in the search results.
 2. **Only show appointments with unfilled forms** Check this box to include any appointments with sent forms that have not been filled by the patient in the search results.

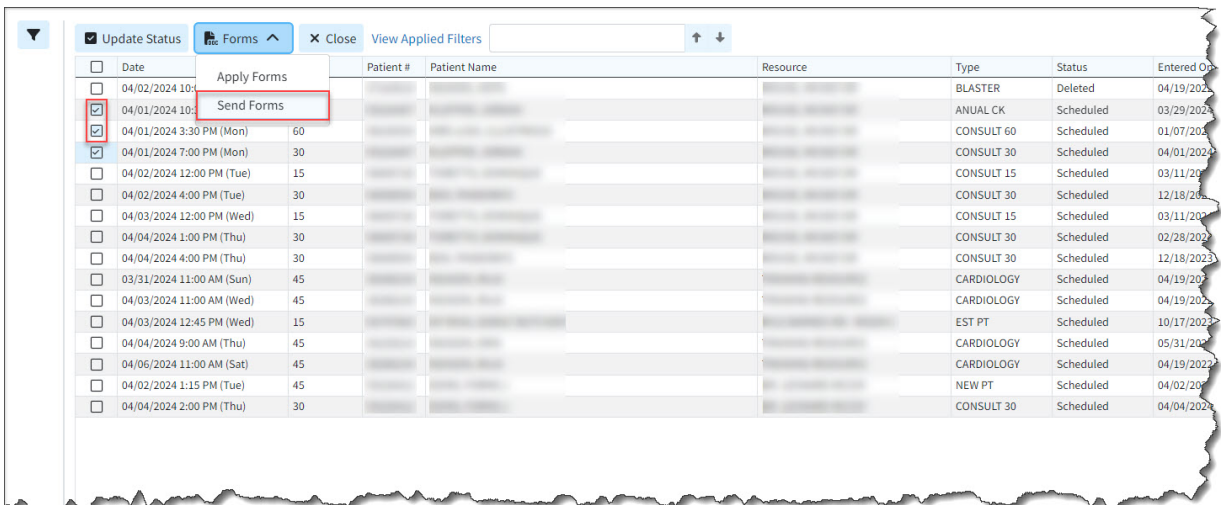
3. **Only show appointments with unapplied forms:** Check this box to include any appointments with completed forms that have not been applied yet in the search results.

3. Click the **Search** button.

4. **Optional:** Click on the  icon to edit your search criteria.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.

5. To manually send a form to a patient, place a check in the box next to the appointment(s) you would like to send the forms to, then click the **Forms** button and select **Send Forms**.



The screenshot shows a table of appointments with columns for Date, Patient #, Patient Name, Resource, Type, Status, and Entered On. A 'Forms' dropdown menu is open, showing 'Apply Forms' and 'Send Forms' options. The 'Send Forms' option is highlighted with a red box. The table contains the following data:

Date	Patient #	Patient Name	Resource	Type	Status	Entered On
04/02/2024 10:00 AM				BLASTER	Deleted	04/19/2023
04/01/2024 10:00 AM				CONSULT 60	Scheduled	01/07/2024
04/01/2024 3:30 PM (Mon)	60			CONSULT 30	Scheduled	04/01/2024
04/01/2024 7:00 PM (Mon)	30			CONSULT 15	Scheduled	03/11/2024
04/02/2024 12:00 PM (Tue)	15			CONSULT 30	Scheduled	12/18/2023
04/02/2024 4:00 PM (Tue)	30			CONSULT 15	Scheduled	03/11/2024
04/03/2024 12:00 PM (Wed)	15			CONSULT 30	Scheduled	02/28/2023
04/04/2024 1:00 PM (Thu)	30			CONSULT 30	Scheduled	12/18/2023
04/04/2024 4:00 PM (Thu)	30			CARDIOLOGY	Scheduled	04/19/2023
03/31/2024 11:00 AM (Sun)	45			CARDIOLOGY	Scheduled	04/19/2023
04/03/2024 11:00 AM (Wed)	45			EST PT	Scheduled	10/17/2023
04/03/2024 12:45 PM (Wed)	15			CARDIOLOGY	Scheduled	05/31/2023
04/04/2024 9:00 AM (Thu)	45			CARDIOLOGY	Scheduled	04/19/2023
04/06/2024 11:00 AM (Sat)	45			NEW PT	Scheduled	04/02/2024
04/02/2024 1:15 PM (Tue)	45			CONSULT 30	Scheduled	04/04/2024

6. Within the pop-up that reads "*Are you sure you want to continue?*" click **Send Forms**.

7. The intake forms will be sent to all selected appointments.

8. Click **Close** to exit the results once finished.