Send Intake Form From an Appointment

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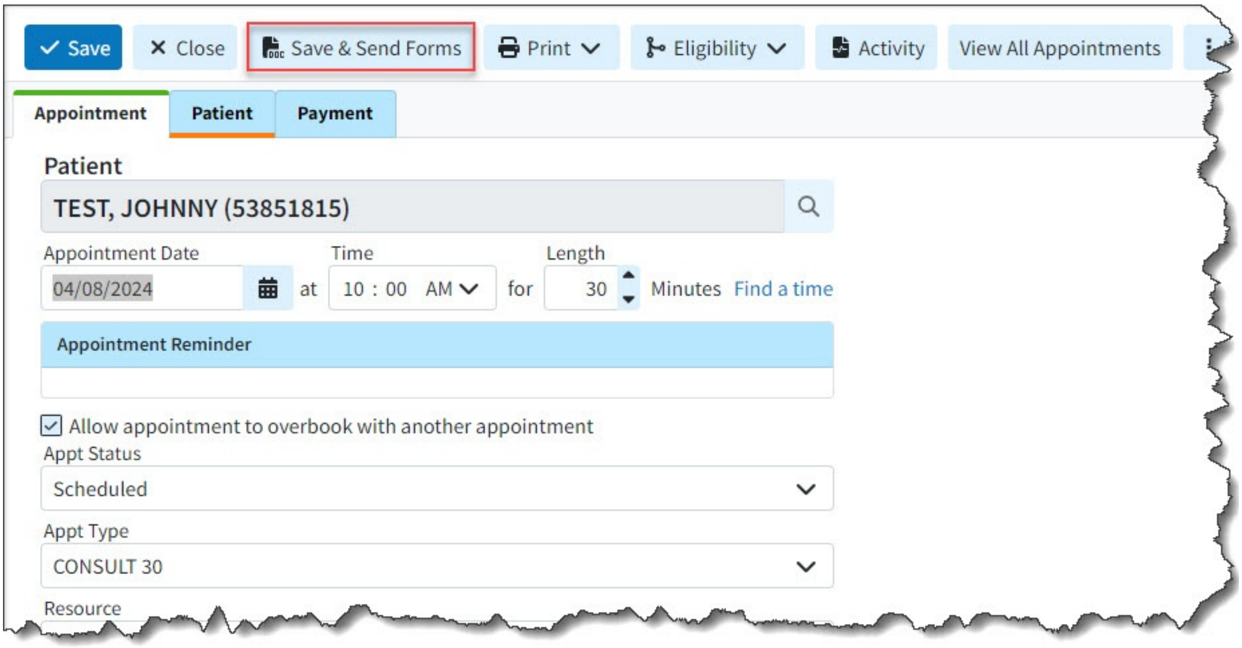
atient intake forms can be sent manually directly from an appointment. You can send forms from an xisting appointment or while creating a new one.

1. Select **Appointments** > **Scheduler**.

2. Create a new appointment or type in the patient name or comment related to the appointment in the **Search for appointments by patient or comment** field. You can also click the **Advanced Search** field and use the filters to narrow down your search.

3. When the appointment(s) is displayed, **right-click on the appointment** and select **Edit Appointment,** o click on the appointment and select the **Edit** button.

4. From the appointment, click the Save and Send Forms button



5. Click **Save & Send Forms** within the pop-up.