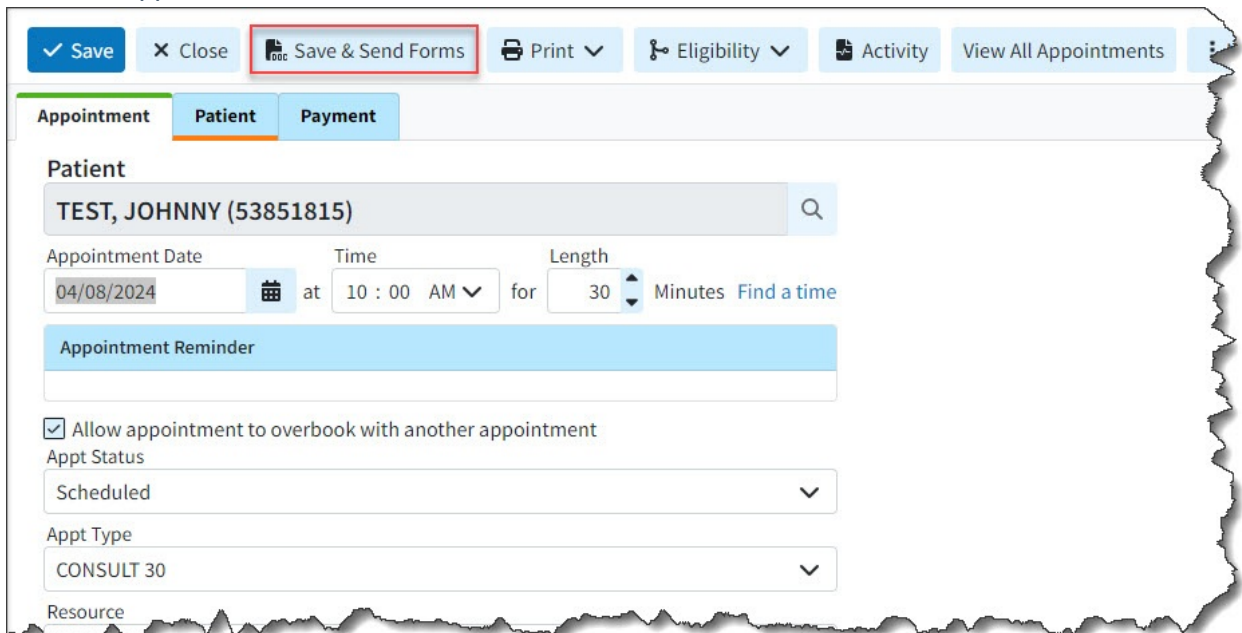


Send Intake Form From an Appointment

Modified on 04/08/2024 9:57 am EDT

Patient intake forms can be sent manually directly from an appointment. You can send forms from an existing 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**, or click on the appointment and select the **Edit** button.
4. From the appointment, click the **Save and Send Forms** button



The screenshot shows the appointment scheduler interface. At the top, there is a toolbar with buttons: Save, Close, Save & Send Forms (highlighted with a red box), Print, Eligibility, Activity, and View All Appointments. Below the toolbar, there are tabs for Appointment, Patient, and Payment. The Patient tab is active, showing a search field with the text "TEST, JOHNNY (53851815)". Below the search field, there are fields for Appointment Date (04/08/2024), Time (10:00 AM), and Length (30 Minutes). There is also an Appointment Reminder field. Below these fields, there is a checkbox for "Allow appointment to overbook with another appointment" which is checked. There are also dropdown menus for Appt Status (Scheduled) and Appt Type (CONSULT 30). At the bottom, there is a Resource field.

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