



Applying Forms

† Modified on 04/08/2024 10:20 am EDT

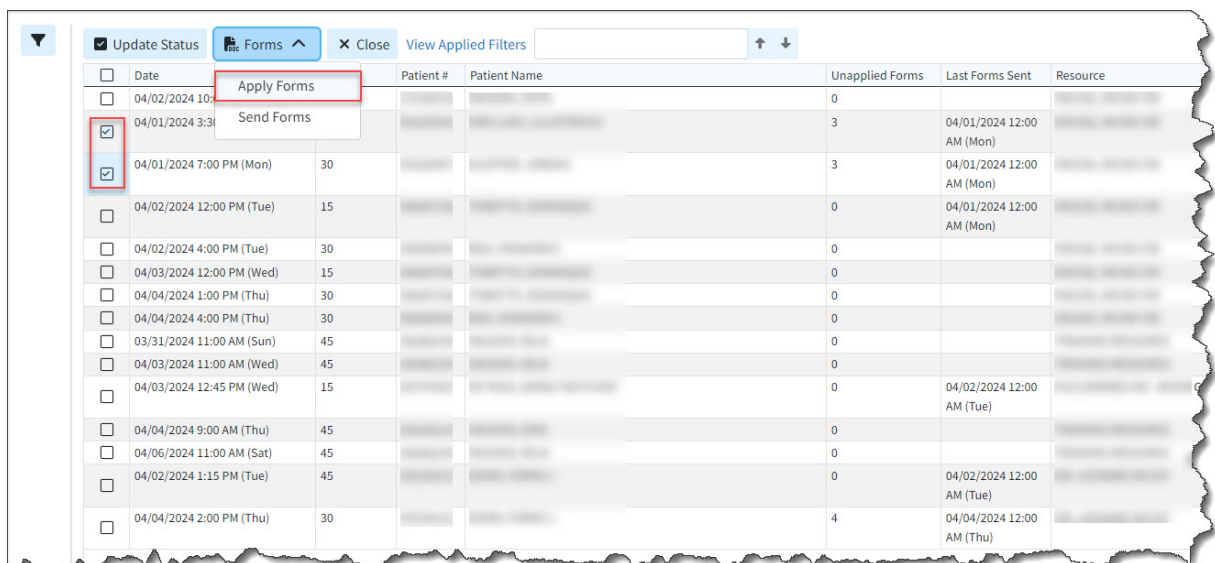
Apply Forms For Multiple Patients (In Appointment Control)

Once intake forms are filled out by patients, you can locate the forms in Appointment Control to apply any new or updated data from the form into the patient information in CMD. Data from forms will not automatically change or override the data in CMD. When an update is found on a field within a form, the user will choose whether to apply it or leave it as is.

1. Select **Appointments > Appointment Control**.
2. Enter your **Search Criteria** or Load a Search Filter.
3. Within **Forms Options** check the **Only show appointments with unapplied forms** option.
4. Click the **Search** button.
5. **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.


6. Look for the **Unapplied Forms** column (right-click the header and select it from the list if it is hidden by default.).
7. Place a check in the box next to the appointment(s) with unapplied forms you would like to apply, then click the **Forms** button and select **Apply Forms**.



<input type="checkbox"/>	Date	Patient #	Patient Name	Unapplied Forms	Last Forms Sent	Resource
<input type="checkbox"/>	04/02/2024 10:00 AM (Tue)			0		
<input checked="" type="checkbox"/>	04/01/2024 3:30 PM (Mon)			3	04/01/2024 12:00 AM (Mon)	
<input checked="" type="checkbox"/>	04/01/2024 7:00 PM (Mon)	30		3	04/01/2024 12:00 AM (Mon)	
<input type="checkbox"/>	04/02/2024 12:00 PM (Tue)	15		0	04/01/2024 12:00 AM (Mon)	
<input type="checkbox"/>	04/02/2024 4:00 PM (Tue)	30		0		
<input type="checkbox"/>	04/03/2024 12:00 PM (Wed)	15		0		
<input type="checkbox"/>	04/04/2024 1:00 PM (Thu)	30		0		
<input type="checkbox"/>	04/04/2024 4:00 PM (Thu)	30		0		
<input type="checkbox"/>	03/31/2024 11:00 AM (Sun)	45		0		
<input type="checkbox"/>	04/03/2024 11:00 AM (Wed)	45		0		
<input type="checkbox"/>	04/03/2024 12:45 PM (Wed)	15		0	04/02/2024 12:00 AM (Tue)	
<input type="checkbox"/>	04/04/2024 9:00 AM (Thu)	45		0		
<input type="checkbox"/>	04/06/2024 11:00 AM (Sat)	45		0		
<input type="checkbox"/>	04/02/2024 1:15 PM (Tue)	45		0	04/02/2024 12:00 AM (Tue)	
<input type="checkbox"/>	04/04/2024 2:00 PM (Thu)	30		4	04/04/2024 12:00 AM (Thu)	

8. Within the Apply Forms window, you will see a **Form** heading and a **Current Patient Information** heading.

1. The Form column shows the information entered by the patient in the intake form.
2. The Current Patient Information column shows the information the patient section currently has in CMD.
3. A green checkmark in the patient information column indicates that the information matches the details on the form, or that the field was left blank.
4. An orange highlighted line indicates that the information for that field is either missing in CMD or does not match the information on the form.

 Click the "**Hide unchanged fields**" box to filter out any fields in the form that match the previously existing patient information.

Apply Forms

DEMO, FORMS(#59226412)
04/02/2024 1:15 PM (Tue)
NEW PT - Checked In
DR. LEONARD MCCOY

▼ Patient Demographics

→ Next Hide unchanged fields

Field	Form	Current Patient Information
Patient Name Suffix		
Patient First Name	FORMS	FORMS ✓
Patient Middle Name		J ✓
Patient Last Name	DEMO	DEMO ✓
Patient Date of Birth	04/04/1993	04/04/1993 ✓
Patient SSN	<input checked="" type="checkbox"/> 123-45-6789	
Patient Gender	MALE	MALE ✓
Patient Address 1	111 N MAGNOLIA AVE	111 N MAGNOLIA AVE ✓
Patient Address 2		
Patient City	ORLANDO	ORLANDO ✓
Patient State	FL	FL ✓
Patient Zip Code	32801	32801 ✓
Patient Home Phone		

> Patient Medical History

> Health Insurance Information


Done Cancel

9. Check the box within the Forms column for the (orange) fields you wish to apply (import) into the patient in CMD.
10. Click **Next** to navigate to the next Form/Appointment.
11. Once finished with your selections to be applied, click **Done**.
12. All Intake Forms will now be applied for all selected appointments.

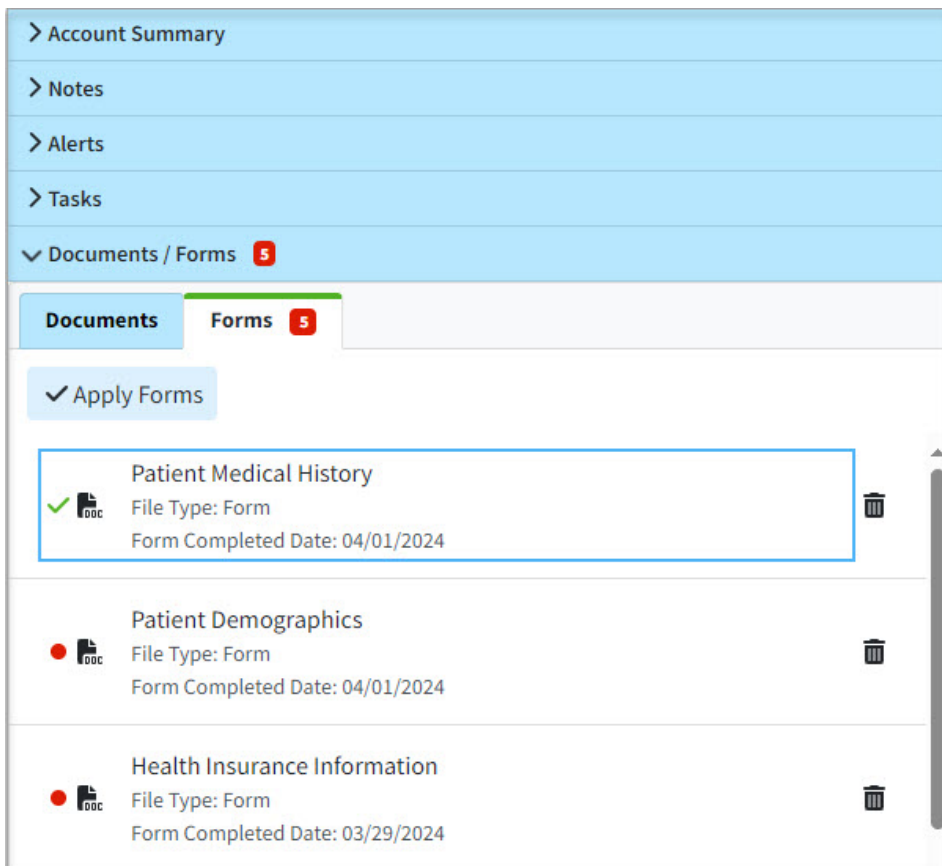
Apply a Form Directly to a Patient Account







Patient Intake Form data can be directly applied to a patient's account in CMD by viewing unapplied forms associated with the patient and opening the **Apply Forms** screen from the patient record (or the Patient tab from an appointment).

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

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


3. Select the **Patient**.
4. Locate and click on **Documents/Forms** from the right-hand side panel.
5. Click **Forms**.
6. Unapplied forms are shown with a red circle next to them and applied forms with a green checkmark.



Account Summary	
Notes	
Alerts	
Tasks	
Documents / Forms 5	
Documents	Forms 5
✓ Apply Forms	
<input checked="" type="checkbox"/> 	Patient Medical History File Type: Form Form Completed Date: 04/01/2024 
<input type="checkbox"/> 	Patient Demographics File Type: Form Form Completed Date: 04/01/2024 
<input type="checkbox"/> 	Health Insurance Information File Type: Form Form Completed Date: 03/29/2024 

7. Click **Apply Forms**.
8. In the "Apply Forms" window, you will find a **"Form"** heading and a **"Current Patient Information"** heading.
 1. The Form column shows the information entered by the patient in the intake form.
 2. The Current Patient Information column shows the information the patient section currently has in CMD.

3. A green checkmark in the patient information column indicates that the information matches the details on the form, or that the field was left blank.
4. An orange highlighted line indicates that the information for that field is either missing in CMD or does not match the information on the form.

 Click the "**Hide unchanged fields**" box to filter out any fields in the form that match the previously existing patient information.

Apply Forms

✓ Patient Demographics

→ Next
 Hide unchanged fields

Field	Form	Current Patient Information
Patient Name Suffix		
Patient First Name	JORDAN	JORDAN ✓
Patient Middle Name		
Patient Last Name	██████████	██████████ ✓
Patient Date of Birth	██████████	██████████ ✓
Patient SSN	██████████	██████████ ✓
Patient Gender	MALE	MALE ✓
Patient Address 1	6345 TESTING LANE	6345 TESTING LANE ✓
Patient Address 2		
Patient City	ORLANDO	ORLANDO ✓
Patient State	FL	FL ✓
Patient Zip Code	32801-3443	328013443 ✓
Patient Home Phone		
Patient Cell Phone	██████████	██████████ ✓

➤ Health Insurance Information

➤ Patient Medical History

➤ Patient Demographics

➤ Health Insurance Information

Done
Cancel

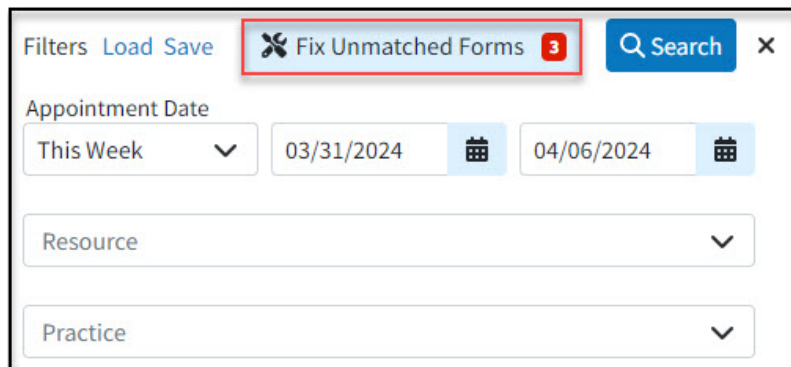
9. Check the box within the Forms column for the (orange) fields you wish to apply (import) into the patient in CMD.
10. Click **Next** to navigate to the next Form.
11. Once finished with your selections to be applied, click **Done**.
12. Click **Save**.

13. All Intake Forms selected will now be applied to the patient.

Fixing Unmatched Forms

In Appointment Control, there is an Unmatched Forms dialog displaying a list of intake forms that could not be matched to a patient, as the system uses the name and date of birth (DOB) for matching. When selecting a form without a match, the user will see the date the form was received, its type, and the patient's name/DOB listed on the form. This screen also enables the user to locate and associate the correct patient with the form.

1. Select **Appointments > Appointment Control**.
2. Within the filters Search screen, click the **'Fix Unmatched Forms'** button. This button displays a number indicating how many unmatched forms are currently found.




3. Select a form and use one of the 3 search options to find the matching patient:
 1. Search for the patient using the Patient search.
 2. Search for the patient by using the Appointment search.
 3. Search for the patient by using one of the 2 options within the **Find By Appointment Date** search.
 1. By appointment on the same day as the form submission date.
 2. By appointment within 3 days of the form submission date.
4. Once the form has been linked to a patient, a green checkmark will appear next to the form.

Unmatched Forms

The forms below didn't match to a single patient. Using the form information, select the matching patient and the form data to the correct patient.

Form Information	Patient
Health Insurance Information Filled Out: 04/04/2024 at 5:28:46 PM	DEMO, FORMS J (59226) <input type="text"/> Appointment
Health Insurance Information Filled Out: 04/04/2024 at 6:24:36 PM	Find By Appointment Date
Patient Demographics Filled Out: 04/05/2024 at 10:34:31 AM	Form Data
Ananda Test Filled Out: 04/05/2024 at 2:55:44 PM	First Name: Forms Middle Initial: Last Name: Demo Date of Birth: 1994-04-04 Primary Insurance Name: Blue Cross Blue Shield of F

5. Select the next form from the list and follow steps 3-4.
6. When finished, click **Done**.
7. Click **Save**.

 Want to see if there are any unmatched forms from anywhere in the application? Customize your shortcuts to include the "Fix Unmatched Forms" shortcut that allows you to find and fix unmatched intake forms directly from your shortcuts section.

Timeline	Dashboard	Shortcuts
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reception/Front Desk	Create patient	Schedule appointment
	<input checked="" type="checkbox"/>	
	Fix unmatched forms	

For more information on customizing your shortcuts, visit our [Customize Shortcuts Help Article](#).

Print a Patient Intake Form

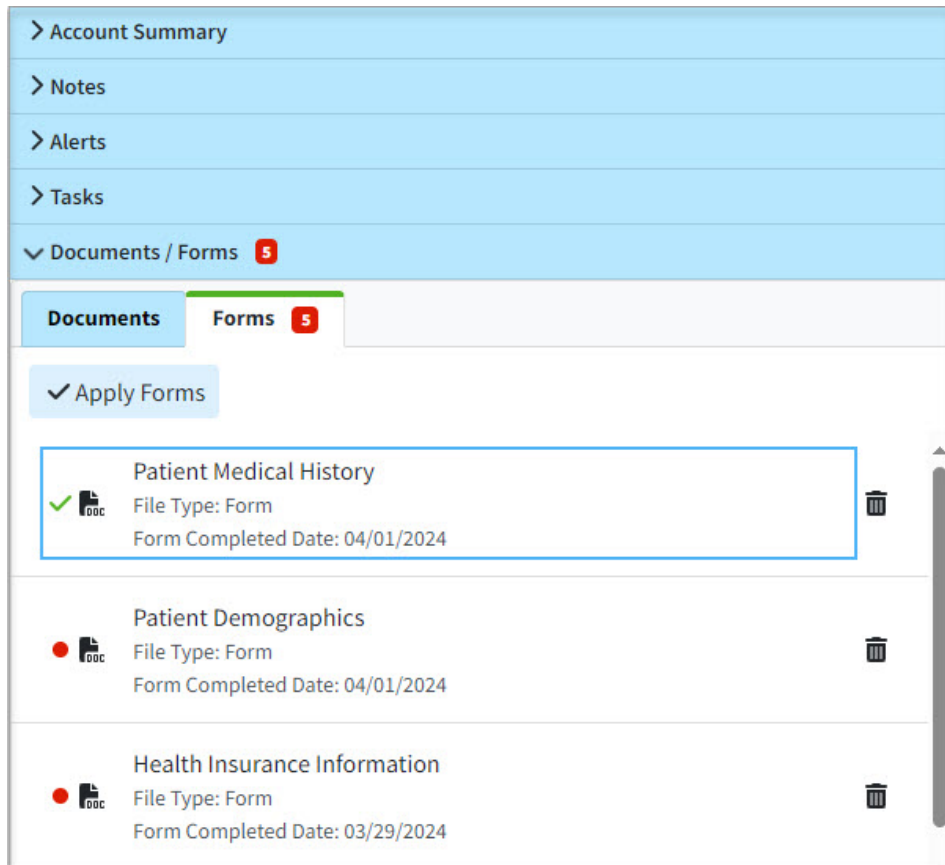
Since some forms don't apply all the form data into CollaborateMD, you can Print Patient Intake Forms that have been completed by patients directly from the forms tab within a patient's account in CMD (or the Patient tab from an appointment) in order to have a pdf file to apply any additional information into the patient section.

1. Select **Patient > Patient**.
2. Use the **Search** field to search through your patients.

 Place a check in the "**Include inactive patients**" box to include inactive patients in your search

results.

3. Select the **Patient**.
4. Locate and click on **Documents/Forms** from the right-hand side panel.
5. Click **Forms**.
6. Unapplied forms are shown with a red circle next to them and applied forms with a green checkmark.



7. Right-click the form you want to print and select **Print** to open the print dialog box and print the form.
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