Applying Forms

t Modified on 04/08/2024 10:20 am EDT

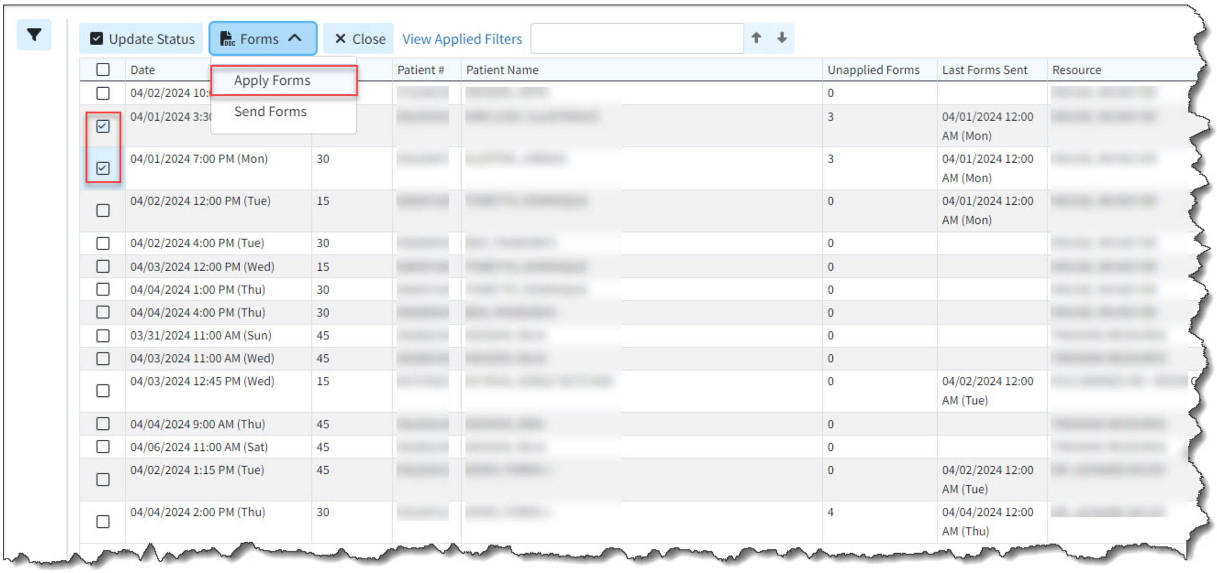
Apply Forms For Multiple Patients (In Appointment Control)

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.

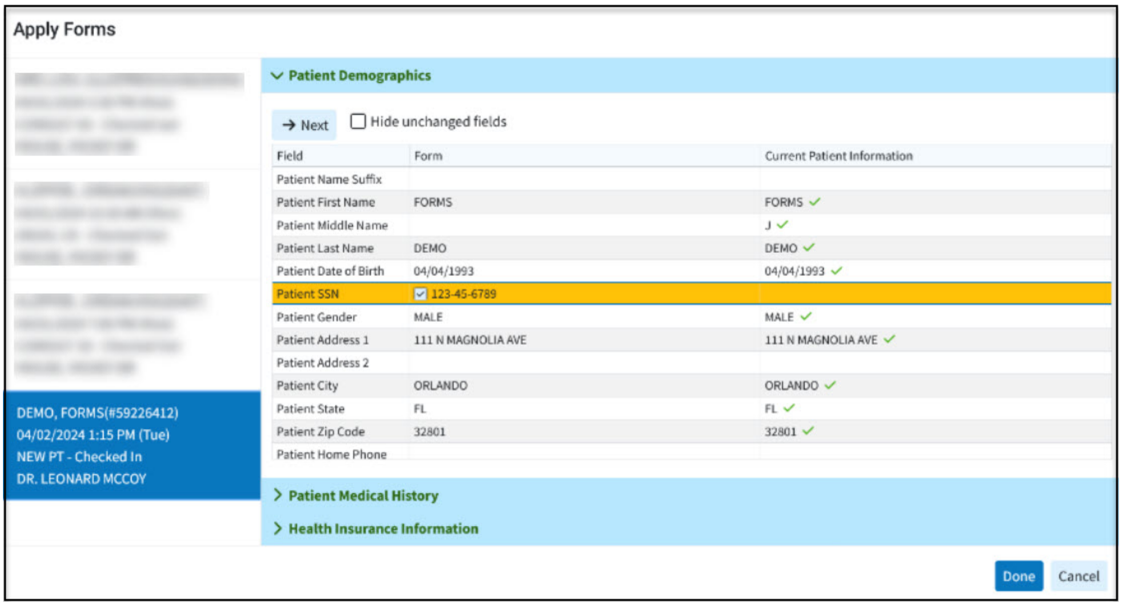
6. Look for the **Unapplied Forms** column (right-click the header and select it from the list if it is hidden by default.).
7. Place a check in the box next to the appointment(s) with unapplied forms you would like to apply, the click the **Forms** button and select **Apply Forms**.



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 ha in CMD.
3. A green checkmark in the patient information column indicates that the information matches th 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 o 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.



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.

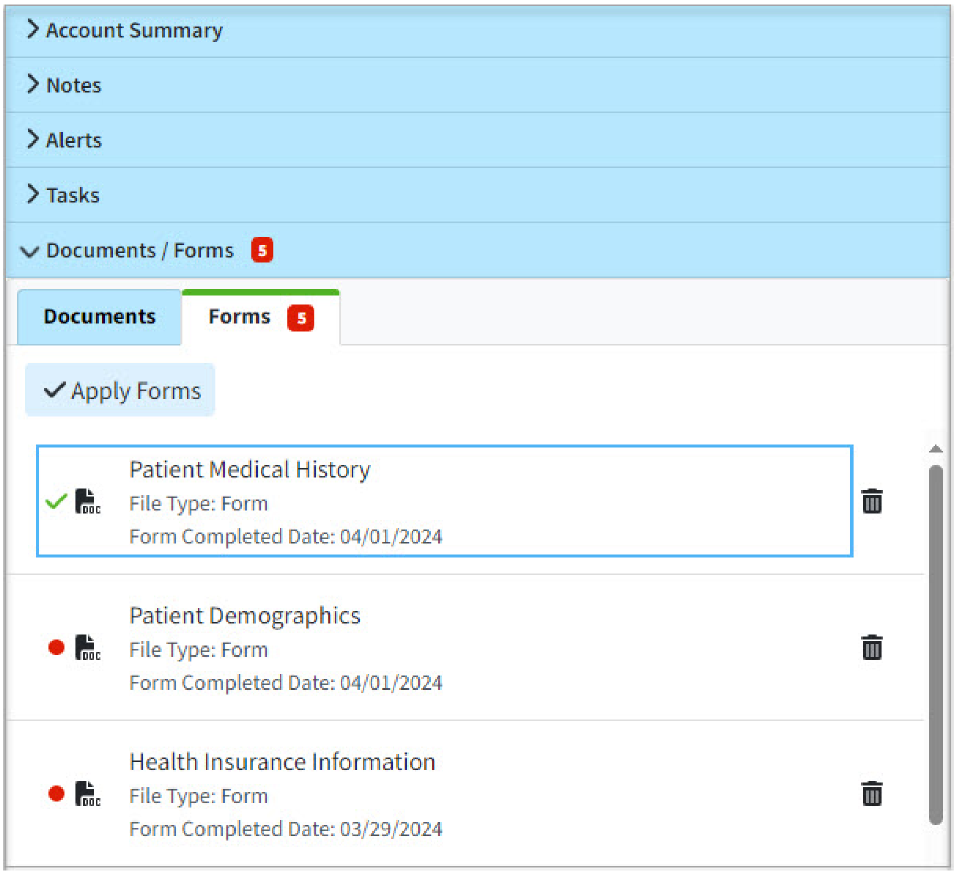
Apply a Form Directly to a Patient Account

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.

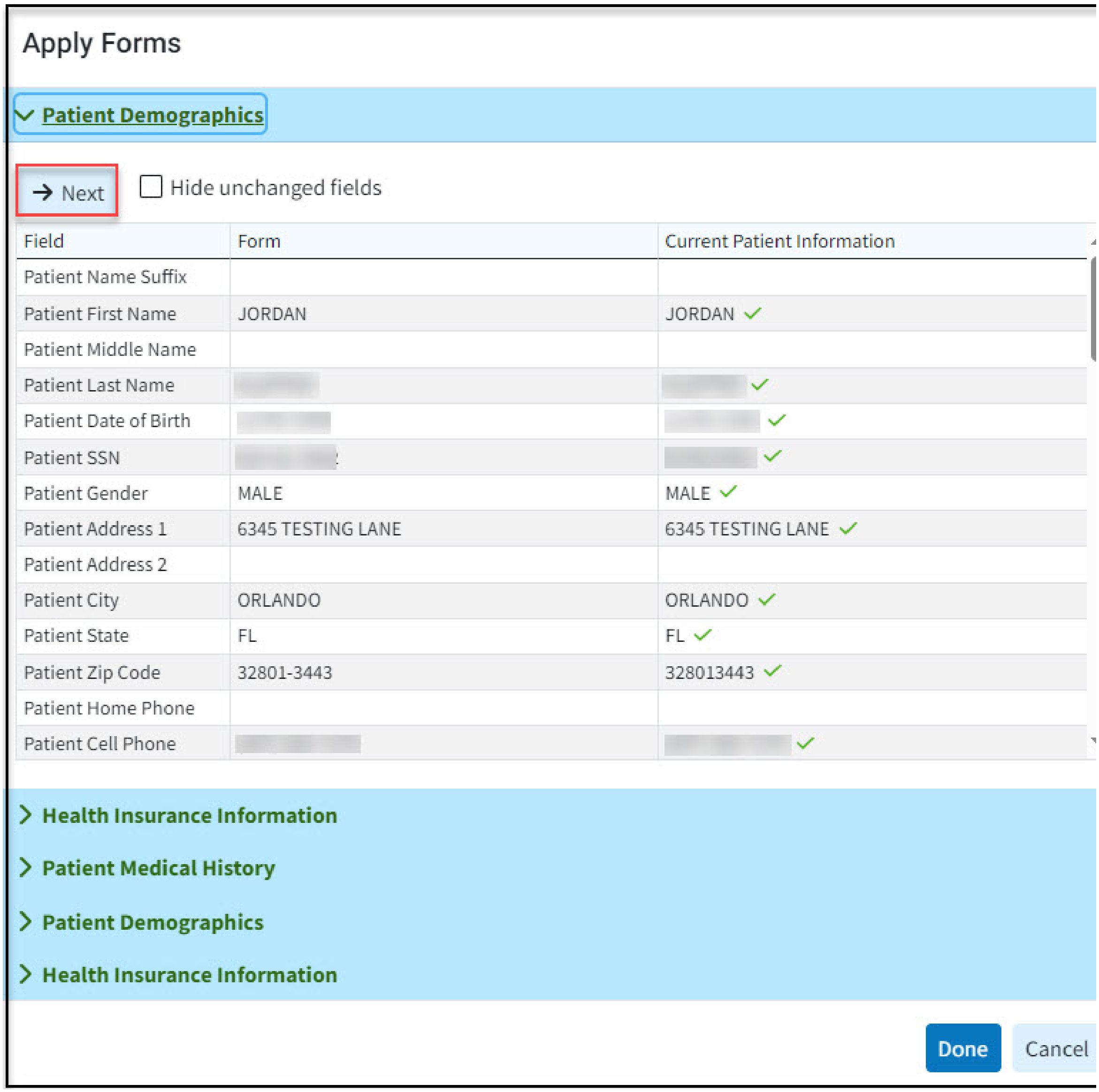


7. Click **Apply Forms**.
8. In the "Apply Forms" window, you will find a "***Form***" heading and a "***Current Patient Information***" heading.
    1. The Form column shows the information entered by the patient in the intake form.
    2. The Current Patient Information column shows the information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

3. A green checkmark in the patient information column indicates that the information matches th 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 (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.



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**.

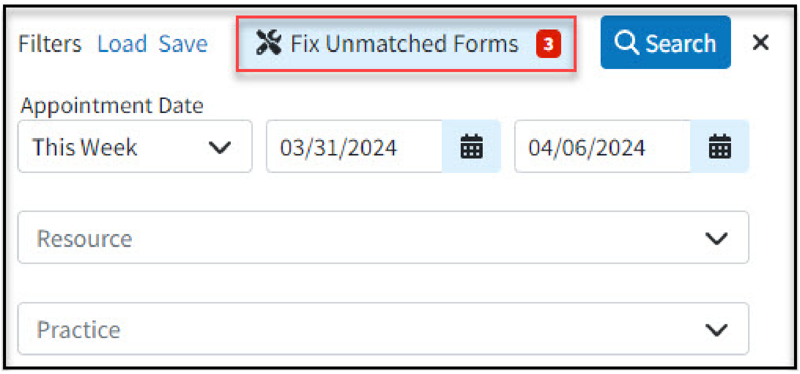
12. Click **Save**.

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

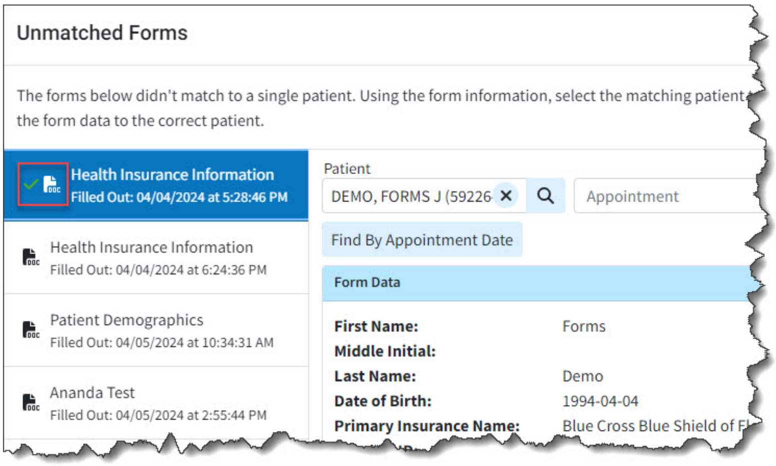
Fixing Unmatched Forms

n Appointment Control, there is an Unmatched Forms dialog displaying a list of intake forms that could nc
e matched to a patient, as the system uses the name and date of birth (DOB) for matching. When selectin
form without a match, the user will see the date the form was received, its type, and the patient's
ame/DOB listed on the form. This screen also enables the user to locate and associate the correct patient
vith the form.

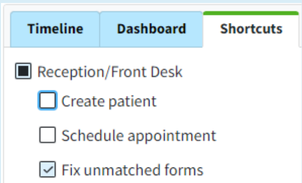
1. Select **Appointments** > **Appointment Control**.
2. Within the filters Search screen, click the '**Fix Unmatched Forms**" button. This button displays a number indicating how many unmatched forms are currently found.



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.



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.
>
> 
>
>
> 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

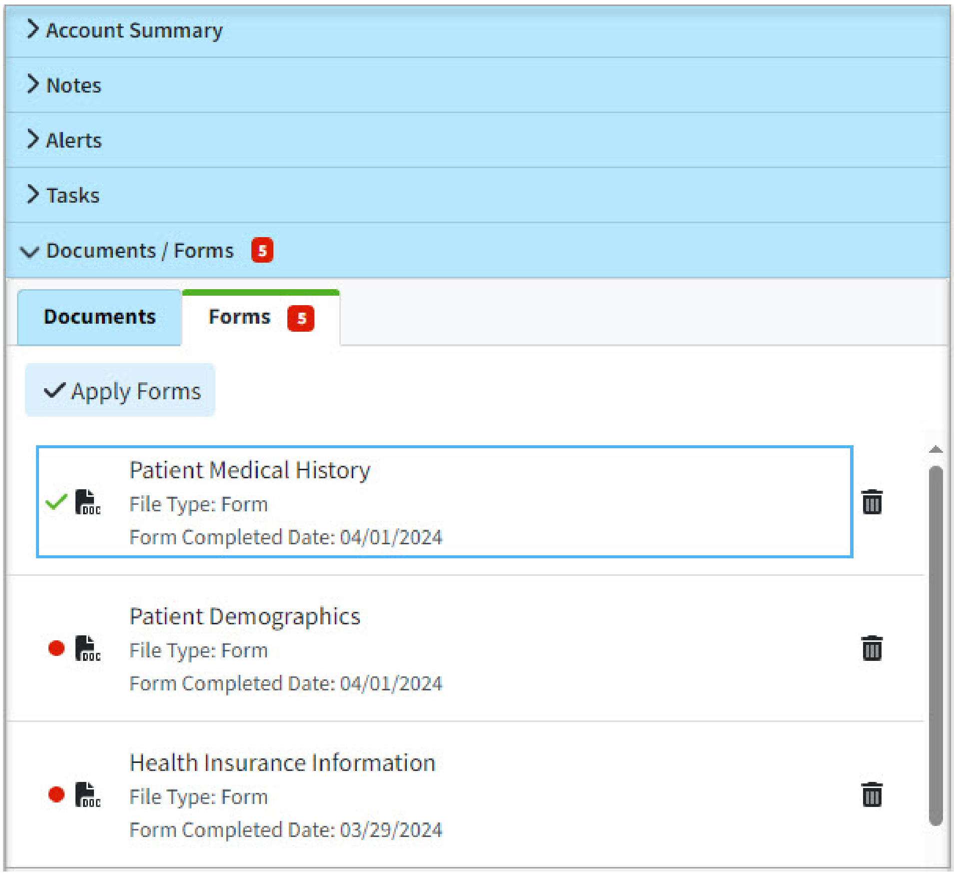
results.

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.