



# Apply Forms For Multiple Patients (In Appointment Control)

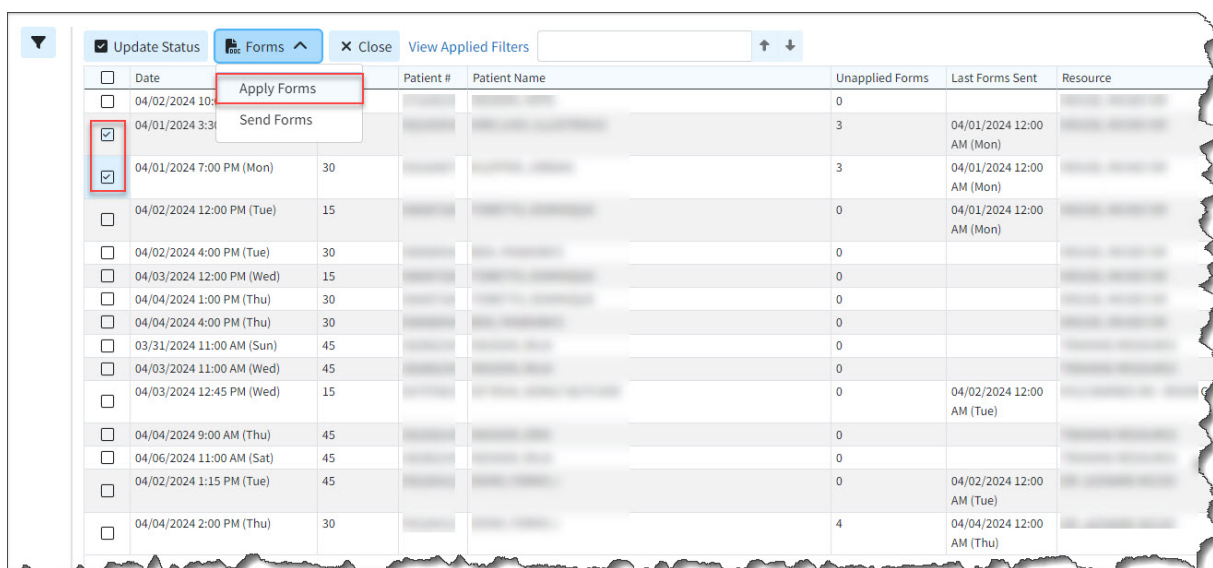
† Modified on 04/05/2024 3:17 pm EDT

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**.




The screenshot shows a table with columns: Date, Patient #, Patient Name, Unapplied Forms, Last Forms Sent, and Resource. A 'Forms' button is visible above the table, and a dropdown menu is open showing 'Apply Forms' and 'Send Forms'. The 'Apply Forms' option is highlighted with a red box. A checkbox next to the date '04/01/2024 7:00 PM (Mon)' is also checked and highlighted with a red box.

| Date                      | Patient # | Patient Name | Unapplied Forms | Last Forms Sent           | Resource |
|---------------------------|-----------|--------------|-----------------|---------------------------|----------|
| 04/02/2024 10:00 AM (Tue) |           |              | 0               |                           |          |
| 04/01/2024 3:30 PM (Mon)  |           |              | 3               | 04/01/2024 12:00 AM (Mon) |          |
| 04/01/2024 7:00 PM (Mon)  | 30        |              | 3               | 04/01/2024 12:00 AM (Mon) |          |
| 04/02/2024 12:00 PM (Tue) | 15        |              | 0               | 04/01/2024 12:00 AM (Mon) |          |
| 04/02/2024 4:00 PM (Tue)  | 30        |              | 0               |                           |          |
| 04/03/2024 12:00 PM (Wed) | 15        |              | 0               |                           |          |
| 04/04/2024 1:00 PM (Thu)  | 30        |              | 0               |                           |          |
| 04/04/2024 4:00 PM (Thu)  | 30        |              | 0               |                           |          |
| 03/31/2024 11:00 AM (Sun) | 45        |              | 0               |                           |          |
| 04/03/2024 11:00 AM (Wed) | 45        |              | 0               |                           |          |
| 04/03/2024 12:45 PM (Wed) | 15        |              | 0               | 04/02/2024 12:00 AM (Tue) |          |
| 04/04/2024 9:00 AM (Thu)  | 45        |              | 0               |                           |          |
| 04/06/2024 11:00 AM (Sat) | 45        |              | 0               |                           |          |
| 04/02/2024 11:15 PM (Tue) | 45        |              | 0               | 04/02/2024 12:00 AM (Tue) |          |
| 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**

**▼ 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**

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

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.