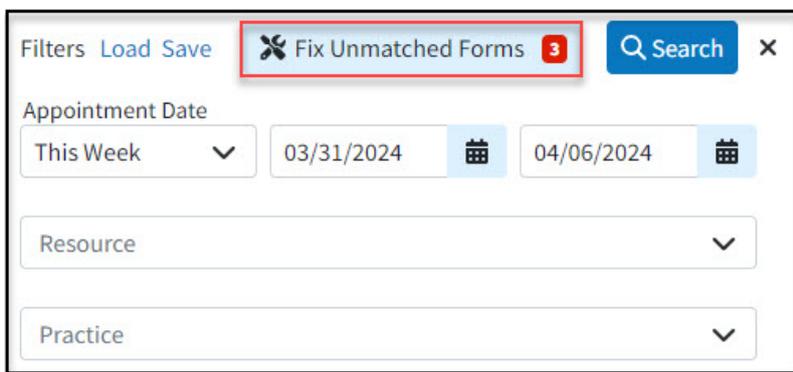


Fixing Unmatched Forms

† Modified on 04/08/2024 9:56 am EDT

1. 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.

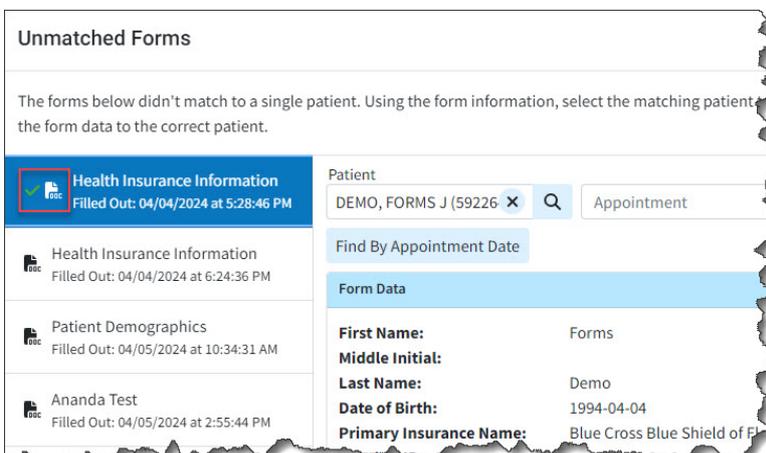
1. Select **Appointments > Appointment Control**.
2. Within the filters Search screen, click the **'Fix Unmatched Forms'** button. This button displays a number indicating how many unmatched forms are currently found.



The screenshot shows a search filter interface. At the top, there are buttons for 'Filters', 'Load', 'Save', and a blue button labeled 'Fix Unmatched Forms' with a red badge containing the number '3'. To the right is a 'Search' button with a magnifying glass icon and a close 'X' button. Below these are filter sections: 'Appointment Date' with a dropdown set to 'This Week' and two date pickers for '03/31/2024' and '04/06/2024'; a 'Resource' dropdown menu; and a 'Practice' dropdown menu.

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.



The screenshot shows the 'Unmatched Forms' dialog. It contains a list of forms on the left and a search area on the right. The forms list includes:

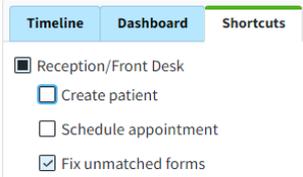
- Health Insurance Information (Filled Out: 04/04/2024 at 5:28:46 PM) - This row is highlighted with a blue background and has a green checkmark in the top-left corner.
- Health Insurance Information (Filled Out: 04/04/2024 at 6:24:36 PM)
- Patient Demographics (Filled Out: 04/05/2024 at 10:34:31 AM)
- Ananda Test (Filled Out: 04/05/2024 at 2:55:44 PM)

The search area on the right includes a 'Patient' search field with the text 'DEMO, FORMS J (59226)' and a search icon. Below it is a 'Find By Appointment Date' section with a 'Form Data' table:

Form Data	
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
■ Reception/Front Desk		
<input type="checkbox"/> Create patient		
<input type="checkbox"/> Schedule appointment		
<input checked="" type="checkbox"/> Fix unmatched forms		

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