

Apply a Form Directly to a Patient Account

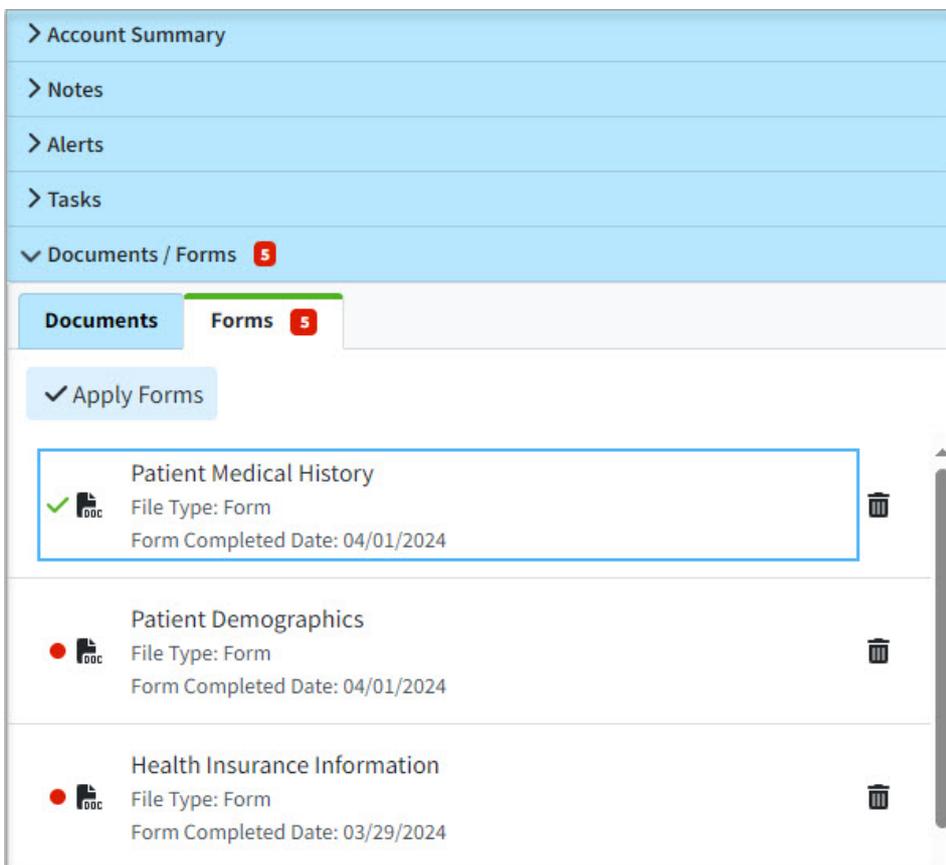
† Modified on 04/08/2024 8:50 am EDT

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.



Form Name	Status	File Type	Form Completed Date
Patient Medical History	Applied (Green Checkmark)	Form	04/01/2024
Patient Demographics	Unapplied (Red Circle)	Form	04/01/2024
Health Insurance Information	Unapplied (Red Circle)	Form	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.
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