Sending Forms

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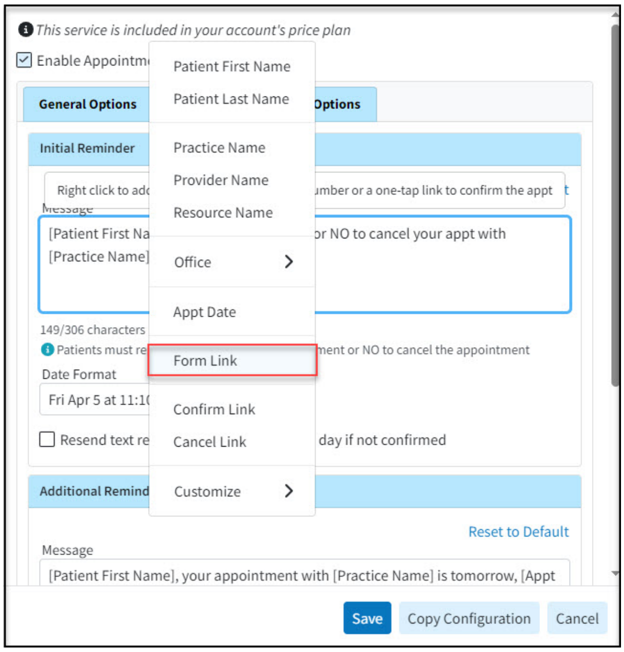
Sending Intake Forms Automatically on Appointment Reminders

Appointment reminders enable the office to inform patients about their upcoming appointments, which reduces no-shows and enhances both productivity and revenue. Additionally, the office can automatically send intake forms via email or text, allowing patients to click a link, choose the form, and complete it online for a faster and more efficient collection of patient data.

⚠ CollaborateMD sends the appointment reminder file to our third-party vendor at 1 AM EDT daily. Any changes after this time will not be reflected until the next day's file submission.

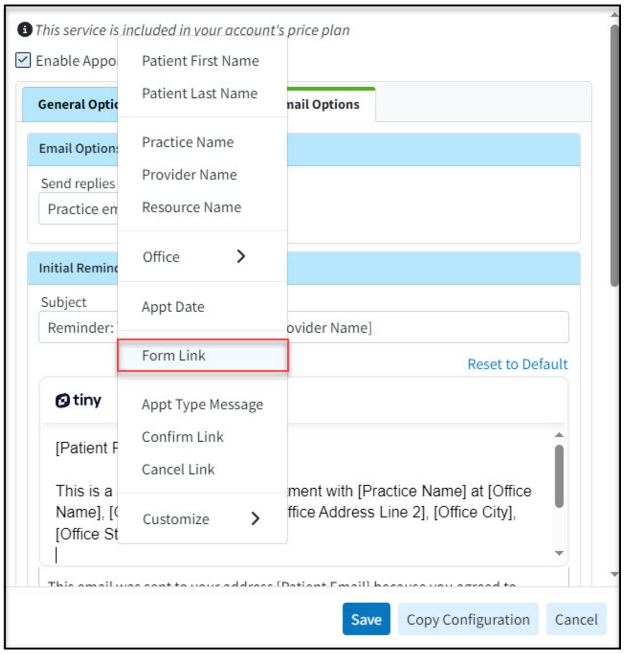
1. Select **Account Administration** > **Services**.
2. Click the **button** next to ***Appointment Reminders***.
3. Depending on your General Options, configure the **Text Options** and/or **Email Options** to include the forms link.
4. To configure for text, click the **Text Options** tab:
    1. **Edit the reminder message**: by right-clicking on the reminder message body (if sending the link on the original first reminder) or right-clicking the additional reminder message body (if sending a separate reminder with the form) and selecting the **[Form Link]** option to allow your patients t select, and fill out the form by simply clicking a link.



Note: If your message exceeds 160 characters, A long patient name could cause messages longer than 160 characters to be sent, which will incur an extra charge for each reminder.

5. To configure for email, click the **Email Options** tab.

    1. **Edit the reminder message** by right-clicking on the reminder message body (if sending the link o the original first reminder) or right-clicking the additional reminder message body (if sending a separate reminder with the form) and selecting the **[Form Link]** option to allow your patients to select, and fill out the form by simply clicking a link.



Want to add a different reminder for different appointment types? Right-click within the message body and Customize Appointment Type Messages. Then add the **Appt Type Message** field to the email reminder

6. Click **Save**.

Please reference the Manage Appointment Reminders Help Article for more information on setting up and configuring appointment reminders.

Send Intake Forms Manually

Patient Intake Forms can be sent manually via email or text directly from the Appointment Control section. You can send forms to an individual or multiple patients at once.

⚠ Please be aware that the form will be sent via email or text, depending on whether the settings selected allow for one or both. Also, patients must have opted in to receive text messages before they can receive them.

1. Select **Appointments** > **Appointment Control**.
2. Enter your **Search Criteria** or Load a Search Filter.
    1. Use the **Appointment Date** drop-down menu to filter by the date or date range of the appointment.
    2. Use the **Resource** drop-down menu to filter the search by a specific resource (doctor, room, etc.).
    3. Use the **Practice** drop-down menu to filter the search by a specific practice (if multiple practices are available).
    4. Use the **Provider** drop-down menu to filter the search by a specific provider (appointments for a specific doctor).
    5. Use the **Facility** drop-down menu to filter the search by a specific Facility (appointments at a different location).
    6. Use the **Office Location** drop-down menu to filter the search by a specific location or office.
    7. Use the **Appointment Status** drop-down menu to filter the search by the status of the appointment (new patient, confirmed, no show, etc.).
    8. Use the **Appointment Type** drop-down menu to filter the search by the appointment type (follow up, new patient, consult, etc.).
    9. Use the **Patient** field to filter the search by the exact patient the appointment is associated with.
    10. Select your **Forms Options**:
        1. **Only Show appointments with unsent forms**: Check this box to include any appointments with unsent forms in the search results.
        2. **Only show appointments with unfilled forms**: Check this box to include any appointments with sent forms that have not been filled by the patient in the search results.

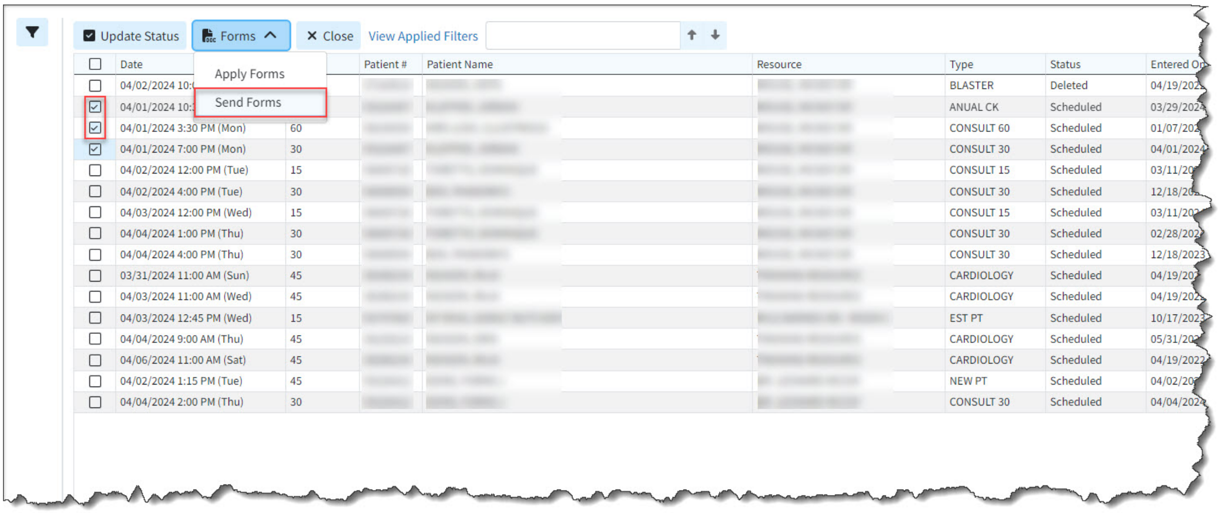
    3. **Only show appointments with unapplied forms**: Check this box to include any appointments with completed forms that have not been applied yet in the search results.

3. Click the **Search** button.

4. ***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.

5. To manually send a form to a patient, place a check in the box next to the appointment(s) you would like to send the forms to, then click the **Forms** button and select **Send Forms**.



6. Within the pop-up that reads "***Are you sure you want to continue?*** click **Send Forms**.

7. The intake forms will be sent to all selected appointments.

8. Click **Close** to exit the results once finished.

Send Intake Form From an Appointment

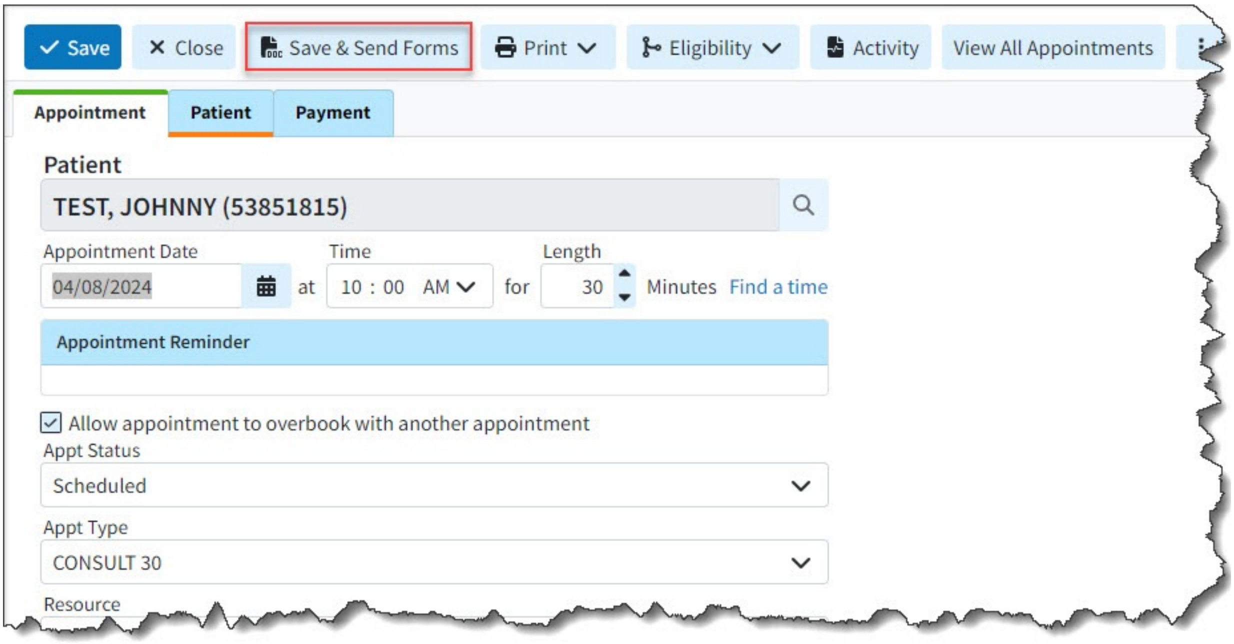
Patient intake forms can be sent manually directly from an appointment. You can send forms from an existing appointment or while creating a new one.

1. Select **Appointments** > **Scheduler**.

2. Create a new appointment or type in the patient name or comment related to the appointment in the **Search for appointments by patient or comment** field. You can also click the **Advanced Search** field and use the filters to narrow down your search.

3. When the appointment(s) is displayed, **right-click on the appointment** and select **Edit Appointment**, or click on the appointment and select the **Edit** button.

4. From the appointment, click the Save and Send Forms button



5. Click **Save & Send Forms** within the pop-up.