

Print a Patient Intake Form

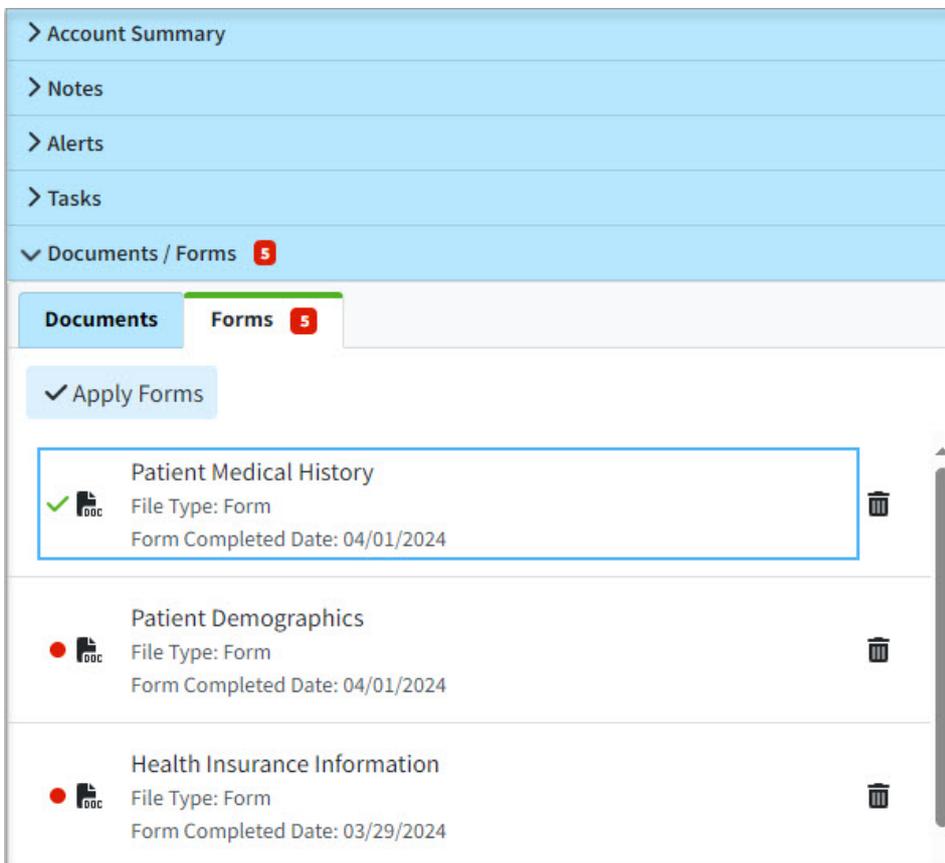
† Modified on 04/08/2024 10:20 am EDT

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.



The screenshot shows a sidebar menu on the left with options: Account Summary, Notes, Alerts, Tasks, and Documents / Forms (5). The 'Documents / Forms' section is expanded, showing two tabs: Documents and Forms (5). The 'Forms' tab is active, displaying a list of forms. The first form, 'Patient Medical History', is highlighted with a blue border and a green checkmark icon, indicating it is applied. The second form, 'Patient Demographics', and the third form, 'Health Insurance Information', are marked with a red circle icon, indicating they are unapplied. Each form entry includes the form name, file type (Form), and the completion date.

| Form Name | File Type | Form Completed Date | Status |
|------------------------------|-----------|---------------------|---------------------------|
| Patient Medical History | Form | 04/01/2024 | Applied (Green Checkmark) |
| Patient Demographics | Form | 04/01/2024 | Unapplied (Red Circle) |
| Health Insurance Information | Form | 03/29/2024 | Unapplied (Red Circle) |

7. Right-click the form you want to print and select **Print** to open the print dialog box and print the form.

