

Patient Intake Forms FAQs

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Why can't I see the patient section to apply forms if I have the View and Apply Forms permission level for Forms?

In order to be able to apply forms you must also have the Patient permission set to Access & Modify to access the patient.

Do I have to reset the form URL when editing an existing custom form?

No, only new forms created need to have the URL copied into CMD. Any updates to existing forms do not require an update to the URL within CMD.

Are there any fees associated with Sending Patient Intake Forms?

Yes, the cost will depend on your price plan and whether you add custom forms. Please visit our Pricing page for more details on practice and/or billing service pricing.

Is Updox part of CMD?

Updox is a cloud-based telemedicine solution designed to empower healthcare workers by offering a comprehensive communication tool that can be fully integrated with their EHR software and is part of our VerHealth family.

Can I print an intake form?

Certainly, you can print a PDF file of a patient's intake form by locating the form within the Documents/Forms side panel, right-clicking on it, and selecting 'Print'.

Why can't I see the patient's SSN when applying a patient form?

When the SSN is included as a field on the form, the user must have the Personally Identifiable Information SSN permission set to allow to view information on that field. Otherwise the field will be masked (grayed out).

Is there a better way to identify "Unmatched Forms" than searching in Appointment Control?

You can customize your shortcuts screen to include the "Fix Unmatched Forms" shortcut that allows you to find and fix unmatched intake forms directly from your shortcuts section.

I am receiving a warning that I need to set my timezone to enable Intake Forms. Why is this required, and where can I configure this in CMD?

For the forms to work in Updox, you must set (if not previously done) your time zone within the Practice section in CMD.

Do I have to create my account with Updox when turning on the Patient Intake Forms feature?

No, the required Updox Account will be set up by CMD in the back end within 24-48 hours of enabling the feature.

Do I still need a new Updox account if I already have an account with Updox?

Yes, you still need an account since this account will be exclusively for your Intake Forms.

Can I use Patient Intake Forms without using the appointment scheduler?

No, to use intake forms you must use CollaborateMDs scheduler. It is also recommended that you set up the appointment reminders feature to have your forms go out automatically.
