

How do I add consent forms to an appointment profile?

07/24/2024 3:40 pm EDT

Consent forms may be used in conjunction with appointment profiles to automatically attach documents to appointments. If any forms need to be read and signed with a specific type of profile, you may save time by adding consent forms to an appointment profile.

To begin, go to **Schedule** and select **Appointment Profiles**.

Schedule Clinical P

SCHEDULING TOOLS

- Calendar
- Availability Search
- Appointments Dashboard
- Dashboard
- Appointment Profiles**

Click on the **+Add New Profile** button in the upper right-hand corner of the page.

Custom Appointment Profiles + Add New Profile

Name	Color	Duration	Reason For Visit	Billing Profile	Payment Profile	Consent Forms	Updated	Created	
☰ Check up		20 minutes	Check up	Physical Check Up	Insurance	0	Oct 27, 2016	Aug 2, 2016	History Edit Archive
☰ CT Scan		120 minutes	CT Scan		Insurance	0	Oct 27, 2016	Aug 2, 2016	History Edit Archive
☰ Background Questions		15 minutes	Patient Information	Healthy Check Up	Insurance	0	Oct 27, 2016	Aug 3, 2016	History Edit Archive

In the new appointment profile prompt, select your consent forms by first checking the **Consent Forms** check box. A drop-down menu will appear, allowing you to select and attach your consent forms.

Create Custom Appointment Profile ✕

Name

Color

Reason For Visit

Duration minutes (5-1200)

Billing Profile

Payment Profile

Enable for Online Scheduling Allow your patients to select this profile when they schedule an appointment with you online

Consent Forms Check to select consent forms

HIPAA Data Use Agreement

Requisition Form

When you're done, click the **Save** button at the bottom of the page. If you'd like to make changes to consent forms for existing Appointment Profiles, you may click the **Edit** button to the right of the desired Appointment Profile in the Custom Appointment Profile List.
