

Create Form Tags

08/28/2024 10:18 pm EDT

You can create and filter existing forms using a tag method. You can use this feature to:

- Add a tag to a form.
- Locate or organize forms based on the tags assigned.
- Search for a form using a tag.

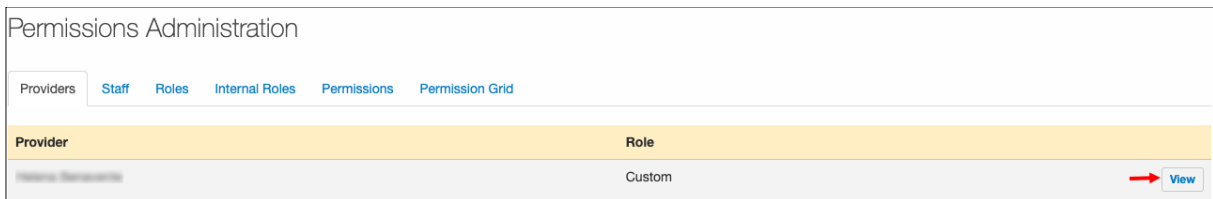
The tag method may help practices that use:

- Smart fields and reference fields within a form to maintain an organized workflow for the clinical note
- Forms that are to be completed by specific users
- A large number of custom forms

Turn on form tag permissions

The form tag permission allows you to create and delete form tags; otherwise, you can only add and remove tags.

1. Select **Account > Staff Permissions**.
2. Select the **Providers** or **Staff** tab and then select **View**.



3. Select **Edit Permissions**.
4. Select **Manage Form Tags**.
5. Select **Save Permissions**.

Permissions for [Redacted]

- Access Patient Analytics
- Provider Dropdown
- View Practice Group
- Share Patients
- Access Reports
- Settings
- Export Patients
- Manage Permissions
- Manage Templates
- Manage Form Tags →
- Manage Accounts
- Show Patient Balance

Close Save Permissions

Create tags

1. Select **Clinical > Tag Management**.
2. Select **New Tag**.

The **Create New Tag** window opens.

The screenshot shows the clinical scheduling interface. At the top, there is a navigation bar with tabs for Schedule, Clinical, Patients, Reports, Billing, Account, Marketplace, and Help. A search bar is on the right. Below the navigation bar, there are controls for the calendar view, including a date selector (Jul 2023), a calendar grid, and a list of filters for Doctors (K Parker, MD, Krystal Parker, Donna John) and Offices (Primary Office, Telehealth, Offsite, Refills). The main area is a calendar grid showing appointments for the week of July 16-22, 2023. The grid is organized by time slots (9:00am to 5:00pm) and days. Appointments include 'Medication Management', 'Dr. Phillips - Follow Up', 'Endoscopy with Ultrasound', 'IV', and 'Anxiety'. A red arrow points to the 'New Tag' button in the top right corner of the calendar view.




4. Enter a tag name and then select **Create**.

The tag has been created.

Note: As form tags are created, you can search to filter through the list.

Manage tags

You can manage tags in **Tag Management** (select **Clinical > Tag Management**).

- To edit or archive tags, select **Edit tag**  or **Archive tag**  under **Action**.
- Active tags are in the **Current** tab.
- Archived tags are in the **Archived** tab
- To activate an archived tag, select **Unarchive tag** .

Name 	Form Usage 	Creator 	Last Modified 	Action
New Patient	0 forms		08/28/2024	 

Tag Management

[+ New Tag](#)



You can create, edit or archive tags. You can also check which forms are currently associated with a specific tag.

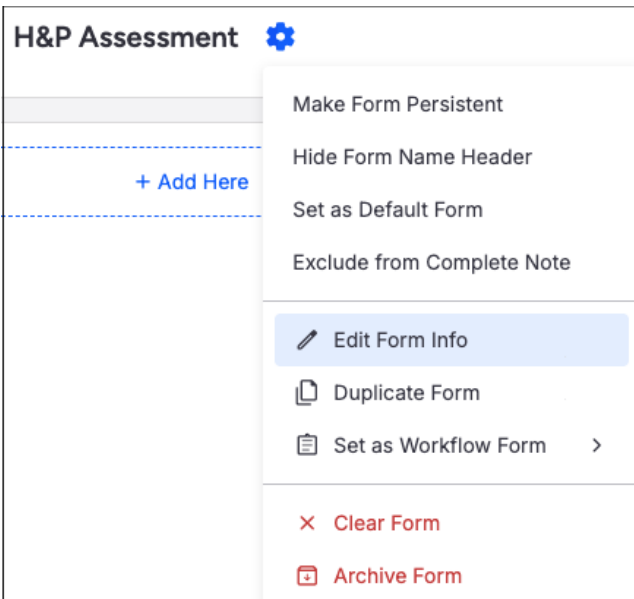
[Current](#) [Archived](#)

Name

Name 	Form Usage 	Creator 	Last Modified 	Action
No results				

Add a tag to a form

1. Select **Clinical > Form Builder (beta)**.
2. Select **Edit form**  to edit the form or select **New Form**.
3. Select **Options**  next to the form name and then select **Edit Form Info**.



The screenshot shows the 'H&P Assessment' form in the Form Builder. A gear icon (Options) is next to the form name. A dropdown menu is open, listing several actions: 'Make Form Persistent', 'Hide Form Name Header', 'Set as Default Form', 'Exclude from Complete Note', 'Edit Form Info' (highlighted), 'Duplicate Form', 'Set as Workflow Form', 'Clear Form', and 'Archive Form'. The form content area below the menu shows a header and a section with a '+ Add Here' button.

4. Search for the tag name.

5. Select **Update**.

Edit Form Info ✕

Form Name

Form Type

Tags
