Document Tag Management

Last modified on 11/12/2025 2:07 pm EST

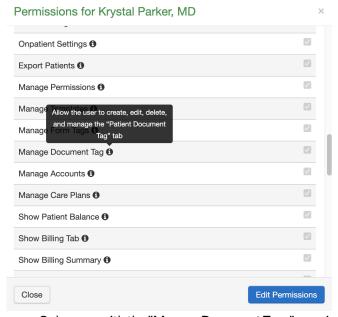
Permissions | Active Tab | Archived Tab | Delete Tag | Merge Tags

The **Document Tag Management** interface contains two tabs:

- Active currently in use and available for tagging documents.
- Archived not in active use but are retained for record-keeping or potential future use. They can be unarchived if needed.

Permissions and Access Control

Account > Staff Permissions > Provider/Staff tab> View > Manage Document Tags

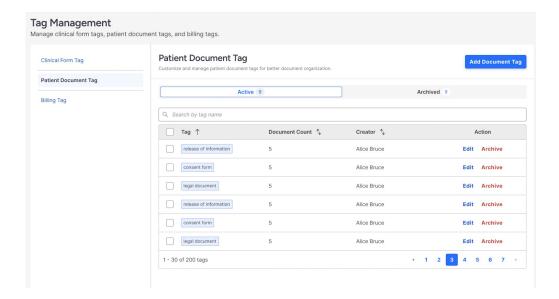


- Only users with the "Manage Document Tags" permission can create, edit, archive, unarchive, or delete tags.
- By default, this permission is enabled for Office Manager roles.
- Other staff or providers have read-only access unless granted this permission.
- Permissions are managed at the practice level and can be assigned via the Staff Permissions setup screen.

Tag Management Actions

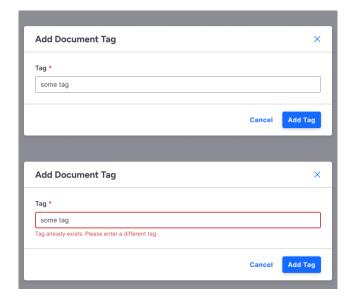
Account > Tag Management

Active Tab



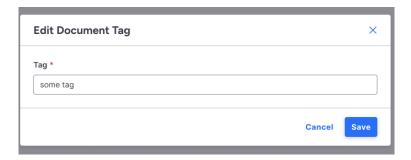
Add a Tag

- Click Add Document Tag.
- A modal window appears.
- Enter the tag name.
 - If the name matches an existing tag (case-insensitive), the system displays a notification that the tag already exists.



Edit a Tag

- Click the **Edit** button next to the tag.
- A modal window appears for editing the tag name.

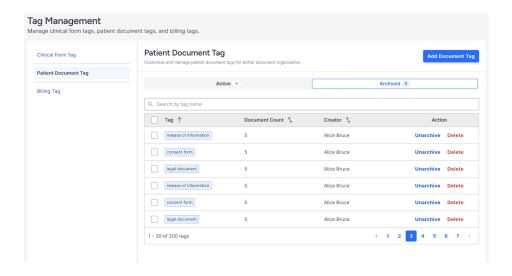


Archive a Tag

- Click the **Archive** button.
- A confirmation modal appears.
- Once archived, the tag moves to the **Archived** tab.



Archived Tab



Archive a Tag

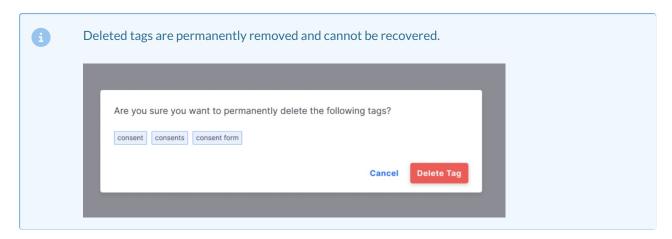
- Click the **Archive** button.
- A confirmation modal appears.
- Once archived, the tag moves to the **Archived** tab.

Unarchive a Tag

- Click the **Unarchive** button.
- The tag moves back to the **Active** tab.

Delete Tag

- Click the Delete button.
- A confirmation modal appears.
- · Confirm deletion.

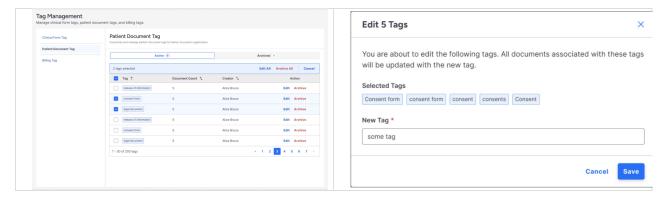


Bulk Tag Actions

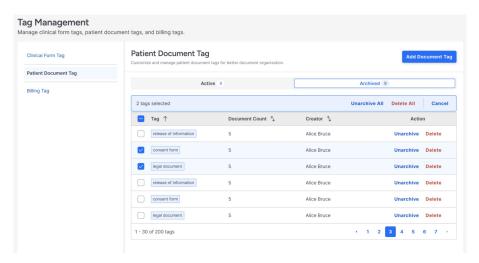
Users can manage tags by selecting multiple options using checkboxes to perform bulk actions, including the ability to merge selected tags into a single tag.

Active Tab

• Edit All - merge selected tags into one by entering a new shared tag name.



• Archive All - click Archive All to move selected tags to the Archived tab. A warning modal confirms the action.



Archived Tab

- Unarchive All
 - Click **Unarchive All** to restore selected tags to the Active tab.
- Delete All

Click **Delete All** to permanently remove selected tags. A warning modal confirms this action.

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