Create Form Tags

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**.
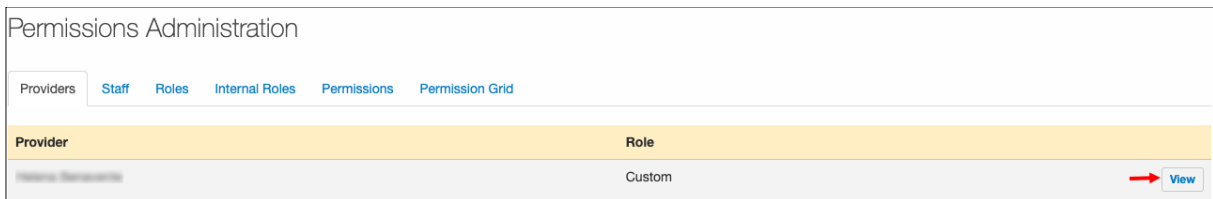
3. Select **Edit Permissions**.

4. Select **Manage Form Tags**.

5. Select **Save Permissions**.

Create tags

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

2. Select **New Tag**.

   The **Create New Tag** window opens.

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]

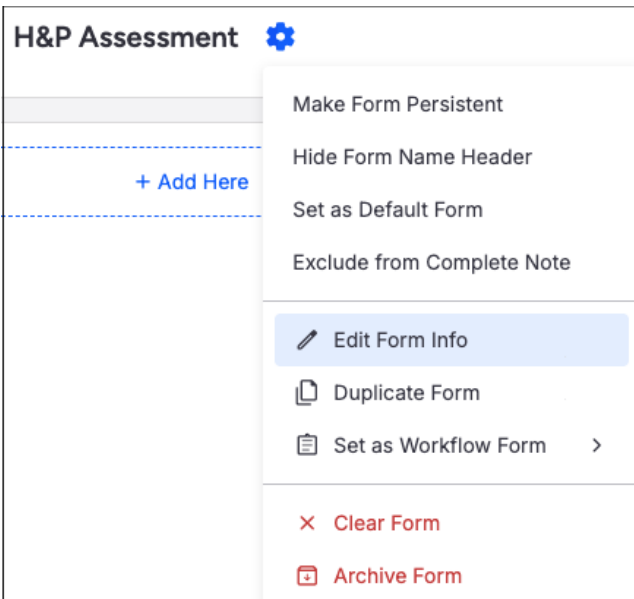You can create, edit or archive tags. You can also check which forms are currently associated with a specific tag.

Current Archived

Name

[🔍 Search by 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**.

H&P Assessment ⚙

+ Add Here

- Make Form Persistent
- Hide Form Name Header
- Set as Default Form
- Exclude from Complete Note

- ✏ Edit Form Info
- ▢ Duplicate Form
- ▤ Set as Workflow Form ＞

- ✕ Clear Form
- 🗓 Archive Form

4. Search for the tag name.

5. Select **Update**.

Edit Form Info   ✕

Form Name

H&P Assessment

Form Type

None   ▾

Tags

New Patient ✕   ▾

Update