Document Tag Management

Last modified on 10/21/2026 11:42 am EDT

Permissions and access control | Active tab | Archived tab | Delete tag | Bulk tag actions

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

View the permissions assigned to a system role

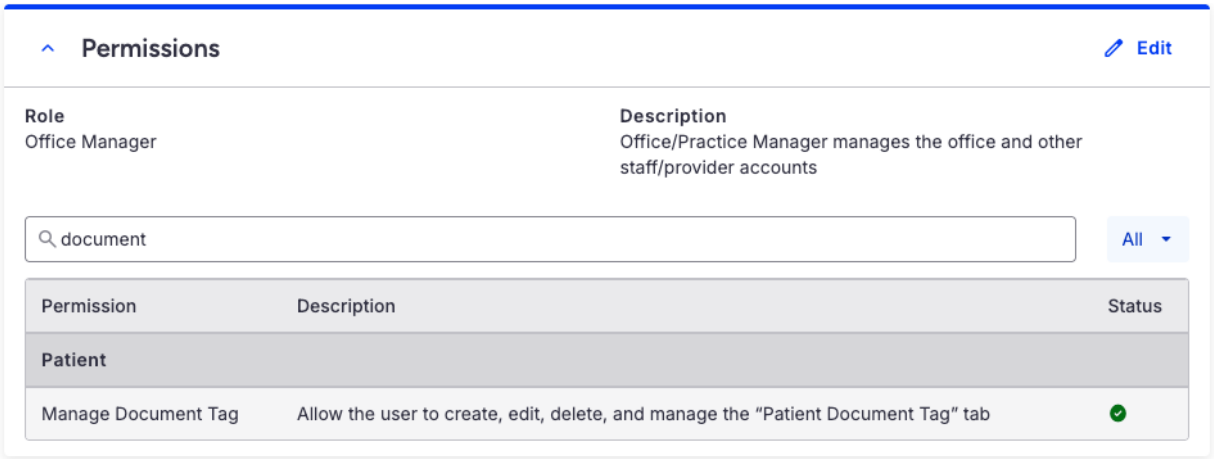
1. Select **Account** > **Practice Management** > **General Management** > **Roles & Permissions**.
2. Select **View** for a specific role to open the **View Role** drawer.

View the permissions assigned to a provider or staff member

1. Select **Account** > **Practice Management** > **General Management** > **Providers** or **Staff**.
2. Select **View** and scroll down to the **Permissions** section.

   The assigned role and description appear at the top of the section.

   > You can search for permissions to see whether they're enabled for the provider or staff member, or filter by enabled or disabled permissions.

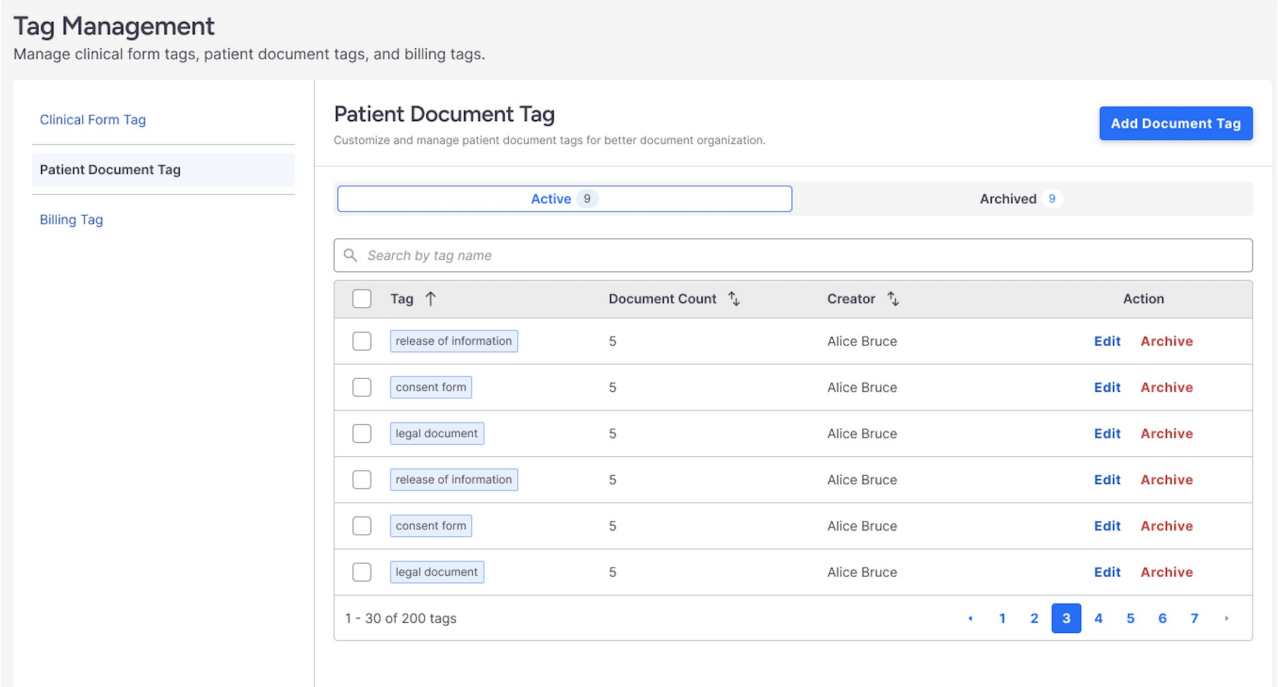


- Only users with the **Manage Document Tag** permission can create, edit, archive, unarchive, or delete tags.
- By default, this permission is enabled for the office manager role.
- Other staff or providers have read-only access unless granted this permission.
- Permissions are managed at the practice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

Tag management actions

Select **Account** > **Practice Management** > **Tag Management** (tab).

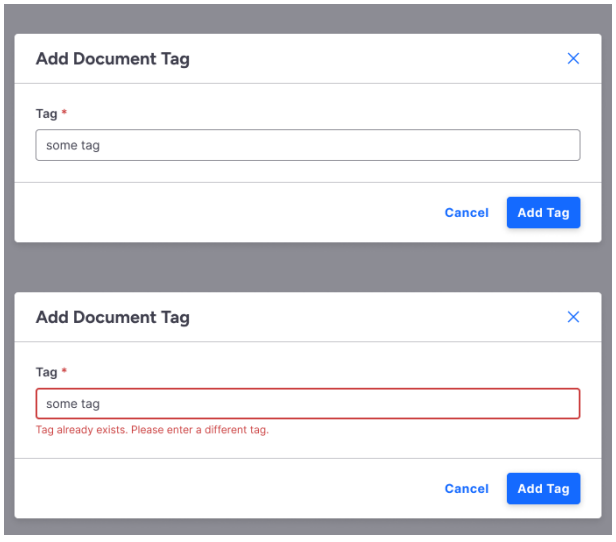
Active tab



Add a tag

1. Click **Add Document Tag**.
2. Enter the tag name in the window.

   If the name matches an existing tag (case-insensitive), the system displays a notification that the tag already exists.



Edit a Tag

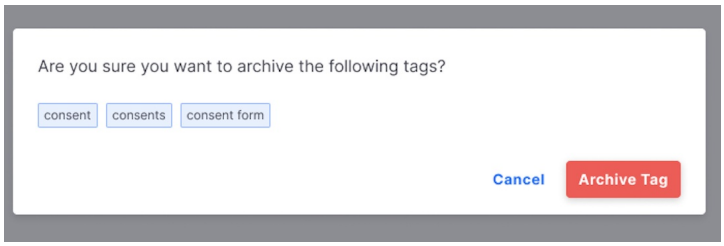
1. Select **Edit** next to the tag to open the **Edit Document Tag** window.
2. Edit the tag name and select **Save**.



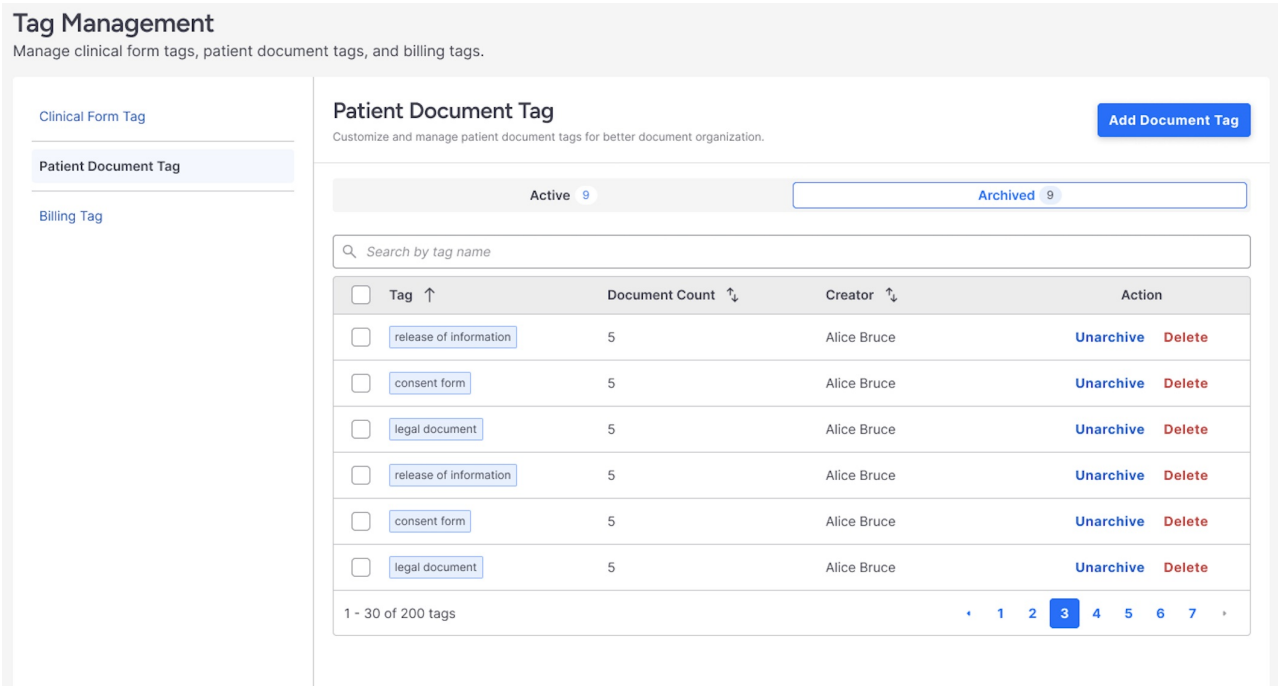
Archive a tag

1. Select **Archive**.
2. Select **Archive Tag** to confirm the archive.

   The tag moves to the **Archived** tab.



Archived tab



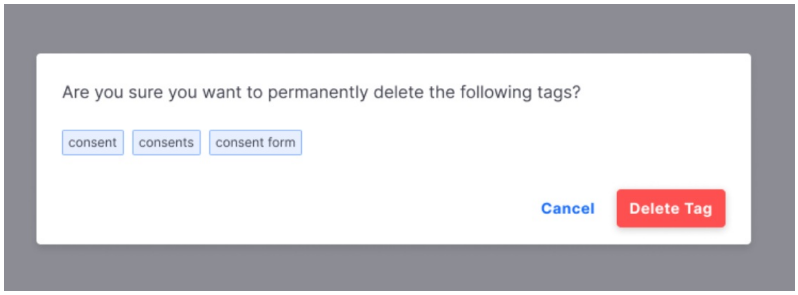
Unarchive a tag

Select **Unarchive**. The tag moves back to the **Active** tab.

Delete a tag

1. Select **Delete**.

2. Select **Delete Tag** to confirm the deletion.



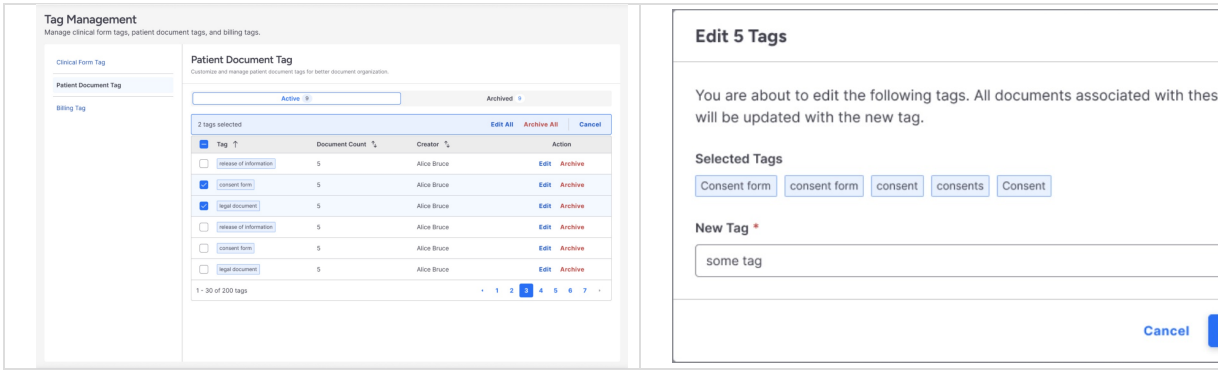
Deleted tags are permanently removed and cannot be recovered.

Bulk tag actions

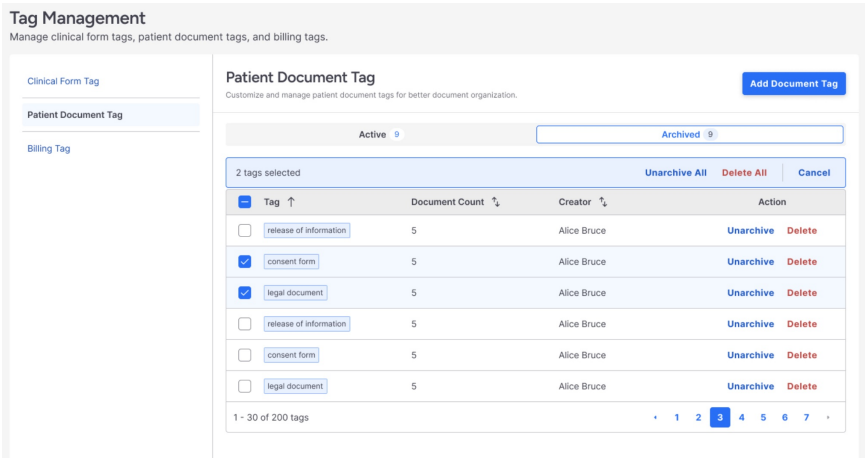
You can manage tags by selecting multiple checkboxes to perform bulk actions, including merging selected tags into a single tag.

Active tab

- **Edit All** - Select the selected tags into one by entering a new shared tag name.



- **Archive All** - Select **Archive All** to move selected tags to the Archived tab. A warning message confirms the action.



Archived tab

- **Unarchive All** - Select **Unarchive All** to restore selected tags to the Active tab.
- **Delete All** - Select **Delete All** to permanently remove selected tags. A warning message 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