

Document Tag Management

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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.

Permissions		Edit
Role Office Manager	Description Office/Practice Manager manages the office and other staff/provider accounts	
<input type="text" value="document"/>		All ▾
Permission	Description	Status
Patient		
Manage Document Tag	Allow the user to create, edit, delete, and manage the "Patient Document Tag" tab	✔

- 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**.

Active tab

Tag Management
Manage clinical form tags, patient document tags, and billing tags.

Clinical Form Tag

Patient Document Tag
Customize and manage patient document tags for better document organization. [Add Document Tag](#)

Active 9 Archived 9

Search by tag name

<input type="checkbox"/>	Tag ↑	Document Count ↑↓	Creator ↑↓	Action
<input type="checkbox"/>	release of information	5	Alice Bruce	Edit Archive
<input type="checkbox"/>	consent form	5	Alice Bruce	Edit Archive
<input type="checkbox"/>	legal document	5	Alice Bruce	Edit Archive
<input type="checkbox"/>	release of information	5	Alice Bruce	Edit Archive
<input type="checkbox"/>	consent form	5	Alice Bruce	Edit Archive
<input type="checkbox"/>	legal document	5	Alice Bruce	Edit Archive

1 - 30 of 200 tags

1 2 3 4 5 6 7

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.

Add Document Tag [X]

Tag *

some tag

Cancel Add Tag

Add Document Tag [X]

Tag *

some tag

Tag already exists. Please enter a different tag.

Cancel Add Tag

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**.

Edit Document Tag
✕

Tag *

some tag

Cancel
Save

Archive a tag

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

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

Are you sure you want to archive the following tags?

consent

consents

consent form

Cancel
Archive Tag

Archived tab

Tag Management

Manage clinical form tags, patient document tags, and billing tags.

Add Document Tag

Clinical Form Tag

Patient Document Tag

Billing Tag

Active 9
Archived 9

<input type="checkbox"/> Tag ↑	Document Count ↑↓	Creator ↑↓	Action
<input type="checkbox"/> release of information	5	Alice Bruce	Unarchive Delete
<input type="checkbox"/> consent form	5	Alice Bruce	Unarchive Delete
<input type="checkbox"/> legal document	5	Alice Bruce	Unarchive Delete
<input type="checkbox"/> release of information	5	Alice Bruce	Unarchive Delete
<input type="checkbox"/> consent form	5	Alice Bruce	Unarchive Delete
<input type="checkbox"/> legal document	5	Alice Bruce	Unarchive Delete

1 - 30 of 200 tags

◀
1
2
3
4
5
6
7
▶

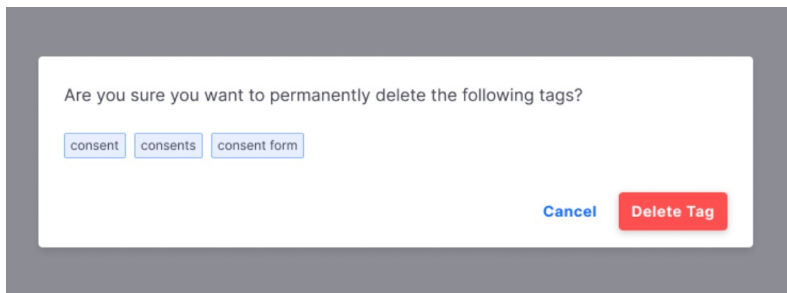
Unarchive a tag

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

Delete a tag

1. Select **Delete**.

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



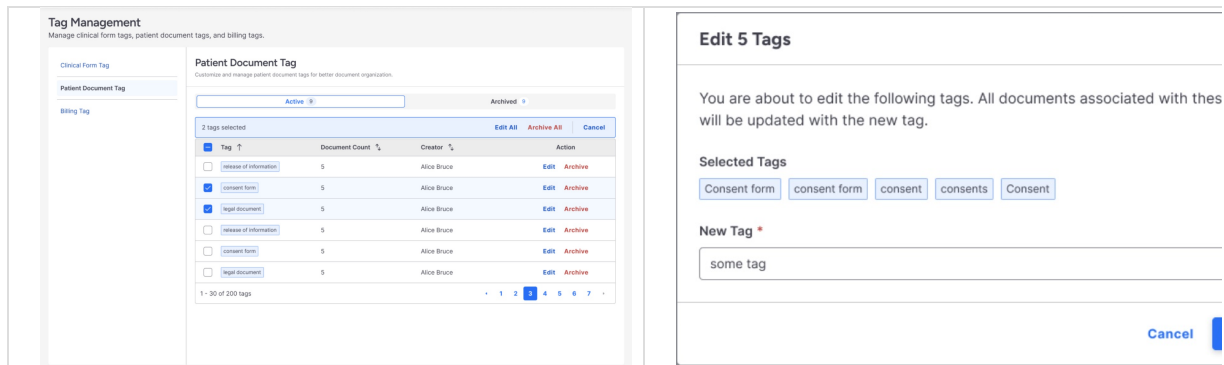
Deleted tags are permanently removed and cannot be recovered.

Bulk tag actions

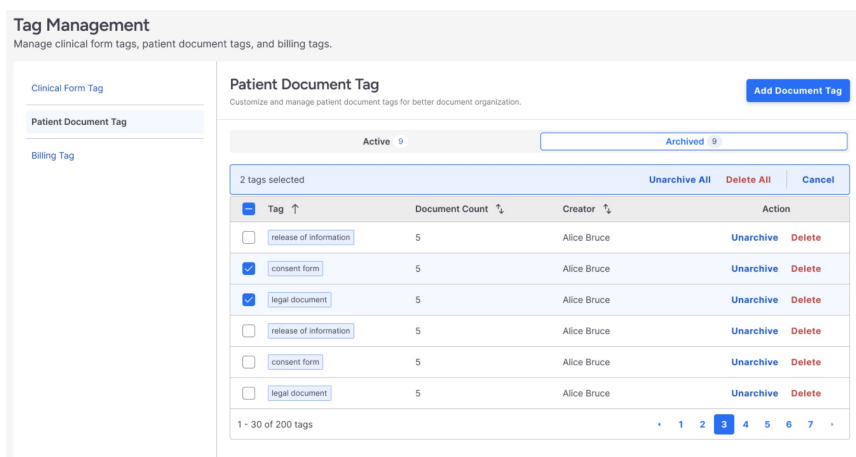
You can manage tags by selecting multiple checkboxes to perform bulk actions, including merging selected tags into a single tag.

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
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