

Document Tag Management

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[Permissions](#) | [Active Tab](#) | [Archived Tag](#) | [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

Permissions for Krystal Parker, MD ×

Onpatient Settings ⓘ	<input checked="" type="checkbox"/>
Export Patients ⓘ	<input checked="" type="checkbox"/>
Manage Permissions ⓘ	<input checked="" type="checkbox"/>
Manage <div>Allow the user to create, edit, delete, and manage the "Patient Document Tag" tab</div> Form Tags ⓘ	<input checked="" type="checkbox"/>
Manage Document Tag ⓘ	<input checked="" type="checkbox"/>
Manage Accounts ⓘ	<input checked="" type="checkbox"/>
Manage Care Plans ⓘ	<input checked="" type="checkbox"/>
Show Patient Balance ⓘ	<input checked="" type="checkbox"/>
Show Billing Tab ⓘ	<input checked="" type="checkbox"/>
Show Billing Summary ⓘ	<input checked="" type="checkbox"/>

CloseEdit Permissions

- 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 > Document Tag Management

Active Tab

Tag Management

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

Clinical Form Tag

Patient Document Tag

Billing Tag

Patient Document Tag

Customize and manage patient document tags for better document organization.

Active 9

Archived 9

<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

1234567

- **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.

Add Document Tag

Tag *

some tag

Cancel

Add Tag

Add Document Tag

Tag *

some tag

Tag already exists. Please enter a different tag.

Cancel

Add Tag

Edit a Tag

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

Edit Document Tag

Tag *

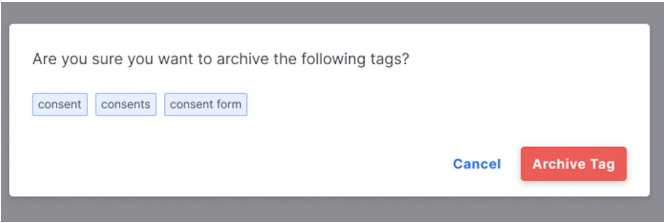
some tag

Cancel

Save

Archive a Tag

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



Archived Tab

Clinical Form Tag

Patient Document Tag

Billing 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	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

1234567

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.

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Deleted tags are permanently removed and cannot be recovered.

Are you sure you want to permanently delete the following tags?

consent consent form consent form

Cancel

Delete Tag

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.

In the Active Tab

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

Tag Management

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

Clinical Form Tag

Patient Document Tag

Billing Tag

Active 8

Archived 0

2 tags selected

Edit All

Archive All

Cancel

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

Edit 5 Tags

You are about to edit the following tags. All documents associated with these tags will be updated with the new tag.

Selected Tags

Consent form consent form consent consents Consent

New Tag *

some tag

Cancel

Save

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

Tag Management

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

Clinical Form Tag

Patient Document Tag

Billing Tag

Active 9

Archived 0

2 tags selected

Unarchive All

Delete All

Cancel

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

Add Document Tag

In the 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
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