Document Tag Management

Last modified on 09/22/2025 3:06 pm EDT

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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

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 > Document 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

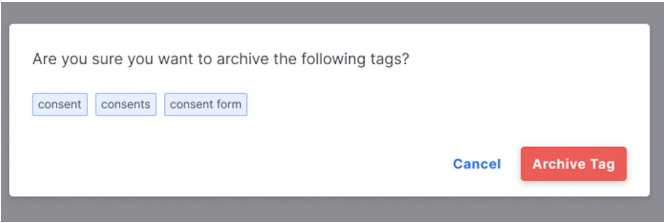- Click the **Edit** button next to the tag.
- A modal window appears for editing the tag name.

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.

> ℹ️ Deleted tags are permanently removed and cannot be recovered.

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

consent consents 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.

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

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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