

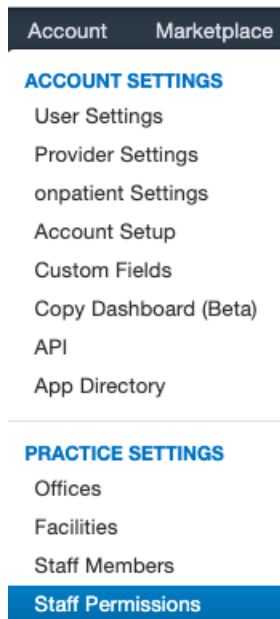
Archiving Signed Consent Forms

07/23/2024 4:35 pm EDT

You may need to archive a signed consent form for a patient if it was incorrectly signed or accidentally duplicated. You can do so with the archive consent forms feature.

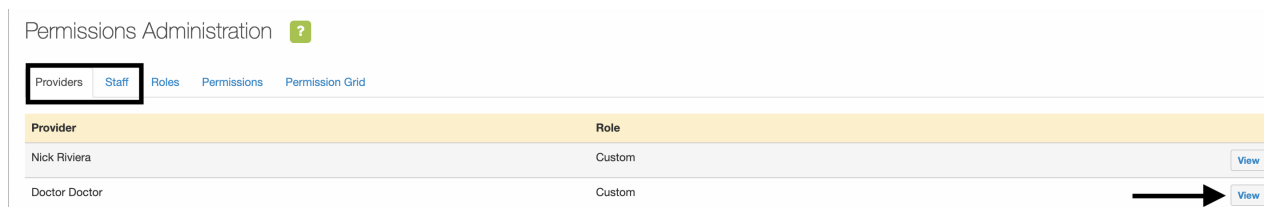
To begin, ensure the permission is enabled.

- Go to **Account > Staff Permissions**.



The screenshot shows a navigation menu with two main sections: 'ACCOUNT SETTINGS' and 'PRACTICE SETTINGS'. Under 'ACCOUNT SETTINGS', there are links for User Settings, Provider Settings, onpatient Settings, Account Setup, Custom Fields, Copy Dashboard (Beta), API, and App Directory. Under 'PRACTICE SETTINGS', there are links for Offices, Facilities, and Staff Members. The 'Staff Permissions' link is highlighted with a blue background.

- Click **View** next to the staff member or provider who needs the permission enabled.



The screenshot shows the 'Permissions Administration' page. At the top, there are tabs for 'Providers', 'Staff', 'Roles', 'Permissions', and 'Permission Grid'. The 'Providers' tab is selected. Below the tabs is a table with two columns: 'Provider' and 'Role'. The table contains two rows: 'Nick Riviera' with role 'Custom' and 'Doctor Doctor' with role 'Custom'. A 'View' button is located at the end of each row. An arrow points to the 'View' button for 'Doctor Doctor'.

Provider	Role	
Nick Riviera	Custom	View
Doctor Doctor	Custom	View

- Click **Edit Permissions**. Check the box next to the Archive Signed Consent Forms permission and **Save Permissions**.

Permissions for Dr. James Smith

Role: Custom

Permissions	
Create and Update Patients	<input checked="" type="checkbox"/>
Access Scheduling	<input checked="" type="checkbox"/>
Appointment Provider Selection	<input checked="" type="checkbox"/>
Use iPad EHR	<input checked="" type="checkbox"/>
Access to Message Center	<input checked="" type="checkbox"/>
Create and Update Contacts	<input checked="" type="checkbox"/>
Access Clinical Notes	<input checked="" type="checkbox"/>
Archive Signed Consent Forms	<input type="checkbox"/>
Sign/Lock Clinical Notes	<input checked="" type="checkbox"/>

Close Edit Permissions

Permissions for Dr. James Smith

Role: Custom

Permissions	
Create and Update Patients	<input checked="" type="checkbox"/>
Access Scheduling	<input checked="" type="checkbox"/>
Appointment Provider Selection	<input checked="" type="checkbox"/>
Use iPad EHR	<input checked="" type="checkbox"/>
Access to Message Center	<input checked="" type="checkbox"/>
Create and Update Contacts	<input checked="" type="checkbox"/>
Access Clinical Notes	<input checked="" type="checkbox"/>
Archive Signed Consent Forms	<input checked="" type="checkbox"/>
Sign/Lock Clinical Notes	<input checked="" type="checkbox"/>

Close Save Permissions

- To archive a consent form, go to the patient's chart and navigate to the **Documents** section. Select the Signed Consent Forms tab. Find the signed consent form you need to archive and click **Archive Consent Form**.

+ Add new patient

Michelle (Shelly) S. Harris (Female | 23 years old | Oct. 14, 1999)

Phone: (443) 555-5555 | Email: sample@sample.com | Date Added: Oct. 21, 2021
 Address: 123 Fake St, Sunnyvale, CA 94089 | Last Scheduled Appt: Mon Jun 13, 2022 | Next Scheduled Appt:
 CDS: Patient must have documented allergies | Adult Immunization Schedule Age: 22-26

Documents **access enabled** | New Referral | Fax Demographics | Print Demographics | Apple Health App Data | Vitals | Schedule New Appointment

Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.

Uploaded Documents | Locked Clinical Notes | **Signed Consent Forms** | Outbound Referrals | Lab Results | Amendments

Signed Consent Forms

Consent Form	Date of Appointment	Date of Signature	Actions
HIPAA Data Use Agreement	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form
HIPAA Data Use Agreement	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form
No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form
No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form

Archived Signed Consent Forms

Archived Consent Form	Date of Appointment	Date of Signature	Date Archived	Reason	Actions
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- If needed, enter a reason. Click **Archive Consent Form** to continue.

Consent Form Archiver

Are you sure you wish to archive the consent form:
 "No Show Policy"
 for appointment on:
 May 18, 2022 8:10 a.m.?

Reason (Optional):

Archive Consent Form

- You will see a message that the form has been archived. Click the X to close.

Consent form has been Archived.

The archived consent form will appear in the Archived Signed Consent Forms section.

- [+ Add new patient](#)
- [Demographics](#)
- [Appointments](#)
- [Clinical Dashboard](#)
- [Documents](#)
- [Eligibility](#)
- [Tasks](#)
- [Problem List](#)
- [Medication List](#)
- [Send eRx](#)
- [Allergy List](#)
- [Drug Interactions](#)
- [CQMs](#)
- [Intake Data](#)
- [Lab Orders](#)
- [Immunizations](#)

Michelle (Shelly) S. Harris (Female | 23 years old | Oct. 14, 1999)

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Address: 123 Fake St, Sunnyvale, CA 94089 Last Scheduled Appt: Mon Jun 13, 2022

Next Scheduled Appt: Next Scheduled Appt

CDS: Patient must have documented allergies Adult Immunization Schedule Age: 22-26

HAM1000006

onpatient access enabled
New Referral
Fax Demographics
Print Demographics

Apple Health App Data
Vitals
+ Schedule New Appointment

Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.

Uploaded Documents
Locked Clinical Notes
Signed Consent Forms
Outbound Referrals
Lab Results
Amendments

Signed Consent Forms

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HIPAA Data Use Agreement	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form	Fax Signature	Send to onpatient	Archive Consent Form
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No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form	Fax Signature	Send to onpatient	Archive Consent Form

Archived Signed Consent Forms

Archived Consent Form	Date of Appointment	Date of Signature	Date Archived	Reason	Actions
No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Apr 04, 2023 1:33 PM	testing for reason	Unarchive Consent Form

If you need to unarchive a signed consent form, click the **Unarchive Consent Form** button.

- [+ Add new patient](#)
- [Demographics](#)
- [Appointments](#)
- [Clinical Dashboard](#)
- [Documents](#)
- [Eligibility](#)
- [Tasks](#)
- [Problem List](#)
- [Medication List](#)
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onpatient access enabled
New Referral
Fax Demographics
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Apple Health App Data
Vitals
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Uploaded Documents
Locked Clinical Notes
Signed Consent Forms
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No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form	Fax Signature	Send to onpatient	Archive Consent Form

Archived Signed Consent Forms

Archived Consent Form	Date of Appointment	Date of Signature	Date Archived	Reason	Actions
No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Apr 04, 2023 1:33 PM	testing for reason	Unarchive Consent Form

Enter a reason, if needed. Click **Unarchive Consent Form** to continue.

Are you sure you wish to unarchive the consent form:
 "No Show Policy"
 for appointment on:
 May 18, 2022 8:10 a.m.?

Reason (Optional):

Unarchive Consent Form

You will see a message that the form has been unarchived. Click the X to close.

Consent Form Archiver



Consent form has been Unarchived.

All of the activities will be tracked in the Audit Log (Clinical > Audit Log).

Audit Log Report

Patient's Name	Username	(All log types)	04/10/2023	04/17/2023	Update Filter	View Last:	Day	Week	Month	Year
Export to File										PAGE 1 →
Date ↓	Time	Patient	User	Type	Action	Details	IP			
04/17/2023	07:43:07 AM		258700 (sampletraining)	Navigation View	Read	accessed Appointment Status Section (from "Schedule" tab > "Appointment Profiles" tab)	10.			
04/17/2023	07:43:06 AM		258700 (sampletraining)	Navigation View	Read	accessed Calendar Section (from "Schedule" tab > "Calendar" tab)	10.			
04/17/2023	07:41:40 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Chart	Update	Update -> Chart: Unarchive signed consent form 'HIPAA Data Use Agreement', reason: testing for unarchive	10.			
04/17/2023	07:41:26 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Chart	Delete	Delete -> Chart: Archive signed consent form 'HIPAA Data Use Agreement', reason: testing for archive	10.			
04/17/2023	07:41:00 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Navigation View	Read	accessed Documents Section (from "Patient Dashboard" tab > "Documents" tab)	10.			