

Patient Chart Documents

Last modified on 12/15/2025 3:57 pm EST

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The **Documents** section of the patient chart provides a centralized location to easily access, view, and manage all patient-related documents, organized across six tabs:

- General
- Locked Notes
- Consents
- Referrals
- Lab
- Amendments

Patient Chart

Patient Summary

Demographics

Appointments

Problem List

Allergy List

Medication List

Send eRx

Documents

Eligibility

Tasks

Drug Interactions

Clinical Dashboard

Documents

General 95

Locked Notes 107

Consents 83

Referrals 1

Lab 0

Amendments 32

Q Search by document name

TagMore Filters

<input type="checkbox"/>	Document Name	Tags	Document Date	Sent to OnPatient	Added By	Date Added	Action
<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/17/2022		Krystal Parker, MD	02/17/2022	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/14/2022		Krystal Parker, MD	02/14/2022	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/04/2022		Krystal Parker, MD	02/04/2022	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Patient HIPAA Signature	No tag	01/28/2022		Krystal Parker, MD	01/28/2022	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Patient HIPAA Signature	No tag	12/08/2021		Krystal Parker, MD	12/08/2021	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>		No tag	11/17/2021		Krystal Parker, MD	11/17/2021	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>		No tag	11/17/2021		Krystal Parker, MD	11/17/2021	<div><div></div><div></div><div></div></div>

Set up tag management permissions

Providers or staff members must set up permissions to create, edit, delete, or manage document tags in [Tag Management](#).

1. Select **Account** > **Staff Permissions** > **Providers or Staff** tab.
2. Select **View**.

The permissions window opens.

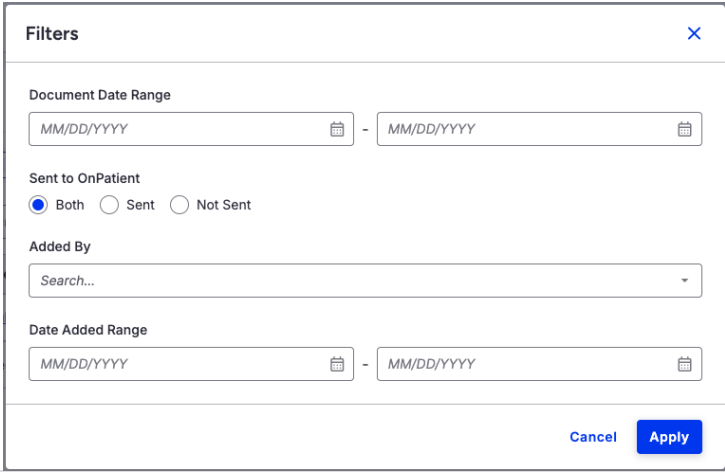


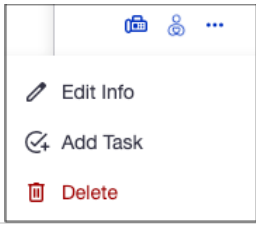

3. Select **Edit Permissions**.
4. Select the **Manage Form Tags** checkbox and then select **Save Permissions**.



All actions performed (create, update, delete, and read/open) within the **Documents** section of the patient chart are recorded in the clinical audit log.

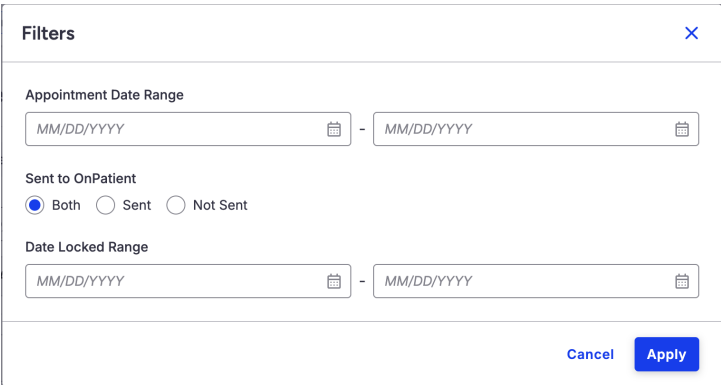


General

The most recent general documents are shown at the top by default and listed in reverse chronological order.

Label/Icon	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search box	Search by document name
Tags	Select a tag to filter documents by a tag.
More filters	<p>Select additional filters and select Apply.</p> 
Document Name	<ul style="list-style-type: none"> Select the document name to view the document. Select the document's checkbox to open the action toolbar. See Batch document actions.
Action 	<p>Single document actions</p> <ul style="list-style-type: none"> Fax general document Send to OnPatient More actions (select ) 
	<p>Batch document actions</p> <p>Select the document's checkbox to open the action toolbar.</p> <ul style="list-style-type: none"> Fax Send to OnPatient Retract from OnPatient Edit all tags Delete

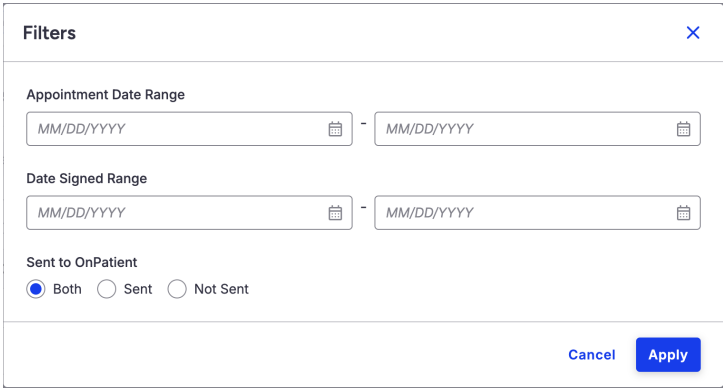






Locked Notes

Label/Icon	Description
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Label/Icon	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search box	Search by provider name
More filters	<p>Select additional filters and select Apply.</p> 
Appointment	<ul style="list-style-type: none"> • Select the appointment to view the locked note. • Select the appointment's checkbox to open the action toolbar. See Batch document actions.
Action 	Single document actions <ul style="list-style-type: none"> • Fax locked note • Send to OnPatient • Open note
	Batch document actions Select the appointment's checkbox to open the action toolbar. <ul style="list-style-type: none"> • Fax locked notes • Send to OnPatient • Retract from OnPatient

Consents

Label/Icon /Checkbox	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search bar	Search by consent name

Label/Icon /Checkbox	Description
More filters	<p>Select additional filters and select Apply.</p> 
 	View signed or archived consents
Consent Name	Select the consent name to view the consent document.
Action   	Single document actions <ul style="list-style-type: none"> • Fax consent • Send to OnPatient • Archive consent
	Batch document actions Select a consent's checkbox to open the action toolbar. <ul style="list-style-type: none"> • Fax all consents • Send all to OnPatient • Retract all from OnPatient • Archive all consents

Referrals

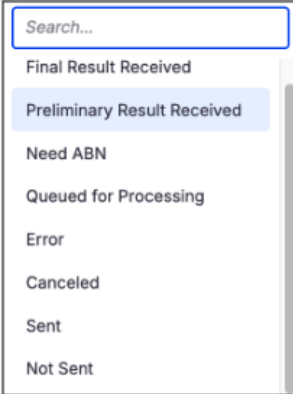
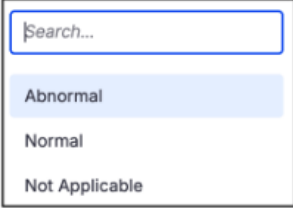
Label/Icon	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search bar	Search by recipient name

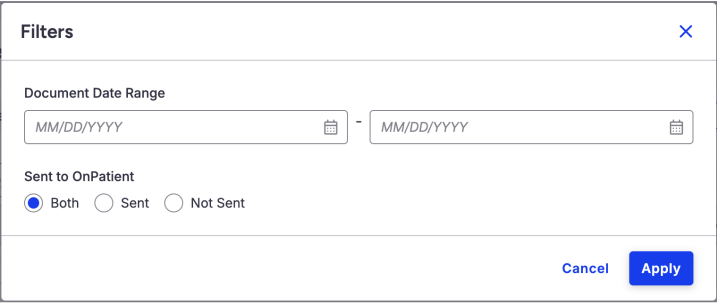


Label/Icon	Description
More filters	<p>Select additional filters and select Apply.</p> <div> <div>Filters</div> <div> <div>Specialty</div> <div>Search...</div> </div> <div> <div>Sent to OnPatient</div> <div> <input checked="" type="radio"/> Both <input type="radio"/> Sent <input type="radio"/> Not Sent </div> </div> <div> <div>Sent By</div> <div>Search...</div> </div> <div> <div>Date Sent Range</div> <div> <div>MM/DD/YYYY</div> <div></div> <div>-</div> <div>MM/DD/YYYY</div> <div></div> </div> </div> <div> <div>Cancel</div> <div>Apply</div> </div> </div>
Recipient	Select the recipient's checkbox to open the action toolbar. See Batch document actions .
Title	Select the referral title to view the referral.
Action	<p>Single document actions</p> <ul style="list-style-type: none"> Fax referral Send to OnPatient Open message
	<p>Batch document actions</p> <p>Select a recipient's checkbox to open the action toolbar.</p> <ul style="list-style-type: none"> Fax all referrals Send all to OnPatient Retract all from OnPatient

Lab

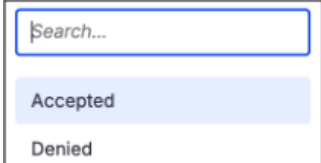
The most recent documents related to the test are shown by default. To access additional lab result documents for the test, select **View All**.

Label/Icon	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search bar	Search by test name

Label/Icon	Description
Status filter	<p>Select a status to filter the documents.</p>  <ul style="list-style-type: none"> • Final Result Received The lab has completed testing and the final, confirmed result is available. • Preliminary Result Received Early test results are available, but additional testing or review may still be in progress. Results may change. • Need ABN An ABN (Australian Business Number) is required before the lab can continue processing or release results. • Queued for Processing The lab has received the sample or request and will begin testing soon. • Error A problem occurred during processing (for example, missing information or a system issue). Follow-up is required. • Canceled The test was canceled and no results will be produced. • Sent The lab request or results have been successfully sent to the intended recipient. • Not Sent The lab request or results have not yet been sent.
Abnormal Flag filter	<p>Select a flag to filter the documents.</p> 
Lab filter	Select a lab to filter the documents.

Label/Icon	Description
More filters	<p>Select additional filters and select Apply.</p> 
Document	<ul style="list-style-type: none"> • Select the document's name to view the document. • Select the test detail's checkbox to open the action toolbar. See Batch document actions.
Action 	<p>Single document actions</p> <ul style="list-style-type: none"> • Fax lab document • Send to OnPatient • Retract from OnPatient
	<p>Batch document actions</p> <p>Select the test detail's checkbox to open the action toolbar.</p> <ul style="list-style-type: none"> • Fax all lab documents • Send all to OnPatient • Retract all from OnPatient

Amendments

Label / Icon / Checkbox	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search bar	Search by amendment name or source
Status filter	

Label / Icon / Checkbox	Description
More filters	<p>Select additional filters and select Apply.</p> <div> <div>Filters</div> <div> <p>Appointment Date Range Not applicable to amendments uploaded manually.</p> <div>MM/DD/YYYY - MM/DD/YYYY</div> </div> <p>Date Requested Range Not applicable to amendments added through clinical note.</p> <div>MM/DD/YYYY - MM/DD/YYYY</div> <p>Date Processed Range Not applicable to amendments added through clinical note.</p> <div>MM/DD/YYYY - MM/DD/YYYY</div> <p>Sent to OnPatient <input checked="" type="radio"/> All <input type="radio"/> Sent <input type="radio"/> Not Sent </p> <p>Added By <input type="text" value="Search..."/> </p> <p>Date Added Range</p> <div> <div>Cancel</div> <div>Apply</div> </div> </div>

Add a document

1. From the **Add Document** dropdown, select **General Document** or **Amendment**.

Documents

Add Document

General 1

Locked Notes 2

Consents 0

Referrals 0

Lab 0

General Document Amendment

Search by amendment name or source

Status More Filters

<input type="checkbox"/>	Amendment Name	Status	Date	Source	Comment	Sent to On Patient	Added By	Date Added	Action
No records									

<

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Prev

Next

The **Add General Document** or **Add Amendment** side panel opens.

2. Select **Choose File** or drag and drop to upload the file.
3. **(Optional)** Edit the document name (defaults to the file name).
4. **(Optional)** Select the document date (defaults to the current date) or a tag.
5. Select **Add General Document** or **Add Amendment**.

Add General Document

Upload General Document *

Max file size is 100 MB. Accept .csv, .doc, .docx, .dot, .dotm, .dotx, .jpeg, .jpg, .odt, .pdf, .png, .rtf, .txt, .xls, .xlsb, .xlt, .xltx, .xlsx files.

Choose File

or drop here

add_document.png

Document Name *

add_document

Document Date

10/02/2025

Tag

Tag...

Cancel

Add General Document