

Patient Chart Documents

Last modified on 09/11/2025 1:45 pm EDT



Patient Chart Documents is currently in beta.

To become a [beta partner](#) for this feature, add a comment to this feature's [roadmap portal card](#).

Permission | General | Locked Notes | Consents | Referrals | Lab | Amendments | Add Document

The Documents tab within the patient chart is designed to make it easy to find, view, and manage all patient-related documents in one place.

<div>Patient Chart</div> <div>Patient Summary</div> <div>Demographics</div> <div>Appointments</div> <div>Problem List</div> <div>Allergy List</div> <div>Medication List</div> <div>Send eRx</div> <div>Documents</div> <div>Eligibility</div> <div>Tasks</div> <div>Drug Interactions</div> <div>Clinical Dashboard</div>	Documents Add Document						
	<div>General 95 Locked Notes 107 Consents 83 Referrals 1 Lab 0 Amendments 32</div> <div>Q Search by document name Tag More Filters</div>						
	<input type="checkbox"/>	Document Name	Tags	Document Date	Sent to OnPatient	Added By	Date Added
	<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/17/2022		Krystal Parker, MD	02/17/2022
	<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/14/2022		Krystal Parker, MD	02/14/2022
	<input type="checkbox"/>	Patient HIPAA Signature	No tag	02/04/2022		Krystal Parker, MD	02/04/2022
	<input type="checkbox"/>	Patient HIPAA Signature	No tag	01/28/2022		Krystal Parker, MD	01/28/2022
	<input type="checkbox"/>	Patient HIPAA Signature	No tag	12/08/2021		Krystal Parker, MD	12/08/2021
	<input type="checkbox"/>	Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021
	<input type="checkbox"/>	Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021
		No tag	11/17/2021		Krystal Parker, MD	11/17/2021	
		No tag	11/17/2021		Krystal Parker, MD	11/17/2021	

Manage Permission

To allow a user to create, edit, merge, or delete document tags, follow the steps below:

Step 1: Update Staff Permissions

- Go to Account from the main menu.
- Select Staff Permissions.
- Locate the user whose permissions you want to update.
- Click Manage Form Tags.
- Users will be able to create, edit, merge or delete tags.

Step 2: Access Document Tag Management

Once the permissions have been updated:

- Navigate to **Account > Document Tag Management**.
- From here, users with the correct permissions can create new tags, edit existing ones, merge duplicate tags,

or delete tags as needed.







All actions performed within the Documents tab of the patient chart are recorded in the clinical audit log.

These actions include: Create, Update, Delete, and Read/Open.

General

- By default, the most recent general documents are displayed at the top, listed in reverse chronological order.

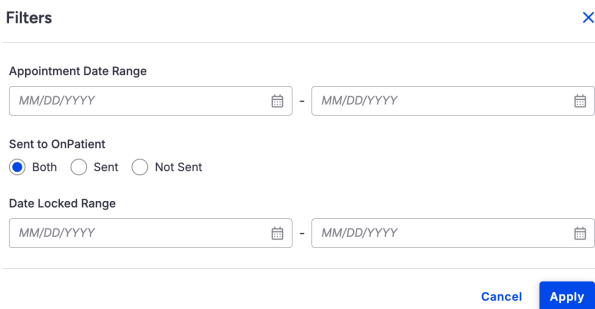



Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none">Number of items listed beside the header nameApplying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.
Search bar	<ul style="list-style-type: none">Search by document name
Tags	<ul style="list-style-type: none">Use the dropdown to search documents by tagsSee manage permission
More filters	<ul style="list-style-type: none">Search by document date range, sent to onpatient, added by and/or date added range. <div><div>Filters</div><div><div>Document Date Range</div><div><div>MM/DD/YYYY</div><div>-</div><div>MM/DD/YYYY</div></div><div>Sent to OnPatient</div><div><input checked="" type="radio"/> Both <input type="radio"/> Sent <input type="radio"/> Not Sent</div><div>Added By</div><div><div>Search...</div></div><div>Date Added Range</div><div><div>MM/DD/YYYY</div><div>-</div><div>MM/DD/YYYY</div></div><div><div>Cancel</div><div>Apply</div></div></div></div>

Label / Icon / Checkbox	Description
Columns	<ul style="list-style-type: none"> Sort order  Document name - click to view Tags Document date Sent to Onpatient <ul style="list-style-type: none"> sent directly to onpatient retract documents from onpatient receive documents from onpatient Added by Date Added
Action column 	<ul style="list-style-type: none"> Fax Send to Onpatient More actions <ul style="list-style-type: none"> Edit info Add task Delete
	Toolbar actions appear when a document checkbox is selected: <ul style="list-style-type: none"> Fax Send to OnPatient Retract from OnPatient Edit all tags Delete Cancel
	<ul style="list-style-type: none"> Pagination viewer

Locked Notes

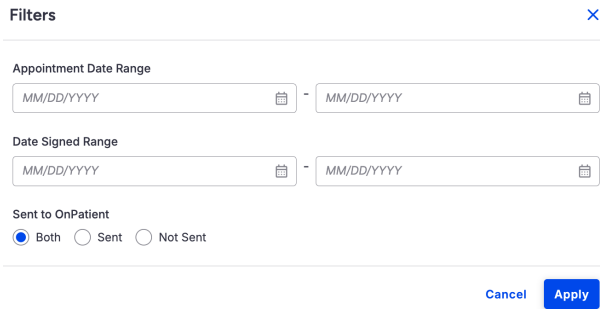


- The five most recent and relevant documents will be shown by default

Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none"> Number of items listed beside the header name Applying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.
Search bar	<ul style="list-style-type: none"> Search by provider name

Label / Icon / Checkbox	Description
More filters	<ul style="list-style-type: none"> Search by appointment date range, sent to onpatient and/or date locked range 
Columns	<ul style="list-style-type: none"> Appointment - click to preview clinical note Locked by Visit reason Sent to Onpatient <ul style="list-style-type: none"> send directly to onpatient retract documents from onpatient receive documents from onpatient Date Locked
Action column 	<ul style="list-style-type: none"> Fax locked note Send to OnPatient Open note
	<p>Toolbar actions appear when a appointment checkbox is selected:</p> <ul style="list-style-type: none"> Fax Send to OnPatient Retract from OnPatient Cancel
	<ul style="list-style-type: none"> Pagination viewer

Consents

Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none"> Number of items listed beside the header name Applying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.
Search bar	<ul style="list-style-type: none"> Search by consent name

Label / Icon / Checkbox	Description
More filters	<ul style="list-style-type: none"> Search by appointment date range, date signed range and/or sent to onpatient 
<div>Signed Archived</div>	<ul style="list-style-type: none"> View signed or archived consents
Columns	<ul style="list-style-type: none"> Consent name - click to view Appointment Date signed Sent to Onpatient <ul style="list-style-type: none"> send directly to onpatient retract documents from onpatient receive documents from onpatient
Action column 	<ul style="list-style-type: none"> Fax Sent to Onpatient Archive consent
	Toolbar actions appear when a consent checkbox is selected: <ul style="list-style-type: none"> Fax Sent to OnPatient Retract from OnPatient Archive Cancel
<div> <div><<</div> <div>< Prev</div> <div>Next ></div> <div>>></div> </div>	<ul style="list-style-type: none"> Pagination viewer

Referrals

Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none"> Number of items listed beside the header name Applying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.
Search bar	<ul style="list-style-type: none"> Search by recipient name

Label / Icon / Checkbox	Description
More filters	<p>Search by specialty, sent to onpatient, sent by and/or date sent range</p> <p>Filters ×</p> <p>Specialty</p> <p>Search...</p> <p>Sent to OnPatient</p> <p><input checked="" type="radio"/> Both <input type="radio"/> Sent <input type="radio"/> Not Sent</p> <p>Sent By</p> <p>Search...</p> <p>Date Sent Range</p> <p>MM/DD/YYYY - MM/DD/YYYY </p> <p>Cancel Apply</p>
Columns	<ul style="list-style-type: none"> • Recipient • Title - click to view • Specialty • Sent to OnPatient <ul style="list-style-type: none"> ◦ send directly to onpatient ◦ retract documents from onpatient ◦ receive documents from onpatient • Sent By • Date Sent
Action column 	<ul style="list-style-type: none"> • Fax • Send to Onpatient • Open message
	<p>Toolbar actions appear when a recipient checkbox is selected:</p> <ul style="list-style-type: none"> • Fax • Send to OnPatient • Retract from OnPatient • Cancel
	<ul style="list-style-type: none"> • Pagination viewer



Lab



- In the default view, only the most recent documents related to the test will be shown. To access additional lab result documents for the test, users can click the 'View All' button.

Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none"> • Number of items listed beside the header name • Applying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.

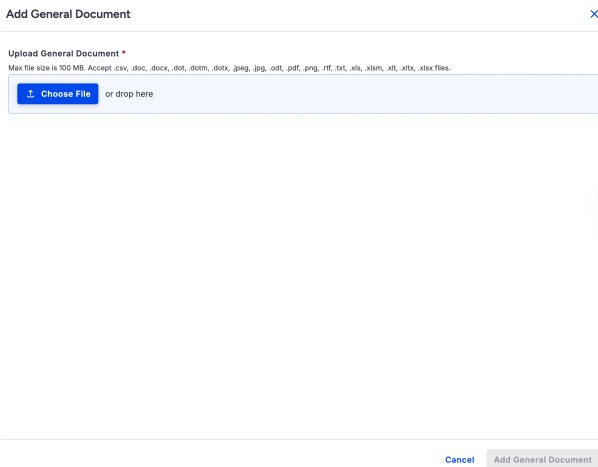
Label / Icon / Checkbox	Description
Search bar	<ul style="list-style-type: none"> Search by test name
Status dropdown	<div> <div>Search...</div> <div> Final Result Received Preliminary Result Received Need ABN Queued for Processing Error Canceled Sent Not Sent </div> </div>
Abnormal flag dropdown	<div> <div>Search...</div> <div> Abnormal Normal Not Applicable </div> </div>
Lab dropdown	<ul style="list-style-type: none"> Search result
More filters	<p>Search by document date range and/or sent to onpatient</p> <div> <div>Filters</div> <div> Document Date Range MM/DD/YYYY - MM/DD/YYYY </div> <div> Sent to OnPatient <input checked="" type="radio"/> Both <input type="radio"/> Sent <input type="radio"/> Not Sent </div> <div> Cancel Apply </div> </div>
Columns	<ul style="list-style-type: none"> Test detail Document Abnormal Document date Sent to Onpatient <ul style="list-style-type: none"> send directly to onpatient retract documents from onpatient receive documents from onpatient Added by
Action column	<ul style="list-style-type: none"> Fax Send to Onpatient Retract from Onpatient
<div> <div> </div> <div>Cancel</div> </div>	<p>Toolbar actions appear when a test detail checkbox is selected:</p> <ul style="list-style-type: none"> Fax Send to OnPatient Retract from OnPatient Cancel
<div> <div>« < Prev</div> <div>Next > »</div> </div>	<ul style="list-style-type: none"> Pagination viewer

Amendments

Label / Icon / Checkbox	Description
Counter	<ul style="list-style-type: none"> Number of items listed beside the header name Applying filters within a specific tab will not affect the counter. The tab will always display the total number of documents, regardless of any filters applied.
Search bar	<ul style="list-style-type: none"> Search by amendment name or source
Status dropdown	<div> <input type="text" value="Search..."/> </div> <div> Accepted </div> <div> Denied </div>
More filters	<ul style="list-style-type: none"> Search by appointment date range, date requested range, date processed range, sent to onpatient, added by and/or date added range <div> <div>Filters</div> <div> <div>Appointment Date Range</div> <div>Not applicable to amendments uploaded manually.</div> <div> <input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/> </div> </div> <div> <div>Date Requested Range</div> <div>Not applicable to amendments added through clinical note.</div> <div> <input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/> </div> </div> <div> <div>Date Processed Range</div> <div>Not applicable to amendments added through clinical note.</div> <div> <input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/> </div> </div> <div> <div>Sent to OnPatient</div> <div> <input checked="" type="radio"/> All <input type="radio"/> Sent <input type="radio"/> Not Sent </div> </div> <div> <div>Added By</div> <div> <input type="text" value="Search..."/> </div> </div> <div> <div>Date Added Range</div> <div> <input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/> </div> </div> <div> Cancel Apply </div> </div>
Columns	<ul style="list-style-type: none"> Amendment name - click to view Status Date Source Comment Sent to OnPatient <ul style="list-style-type: none"> send directly to onpatient retract documents from onpatient receive documents from onpatient Added by Date added
Action column  	<ul style="list-style-type: none"> Fax Send to Onpatient

Label / Icon / Checkbox	Description
	<p>Toolbar actions appear when an amendment name checkbox is selected:</p> <ul style="list-style-type: none"> • Fax • Send to Onpatient • Retract from Onpatient • Cancel
	<ul style="list-style-type: none"> • Pagination viewer

Add Document

Label / Icon / Checkbox	Description
Add document dropdown	<ul style="list-style-type: none"> • Choose document type, general or amendment
General document	<ul style="list-style-type: none"> • Choose file type to upload 
Amendment document	<ul style="list-style-type: none"> • Choose file type to upload 