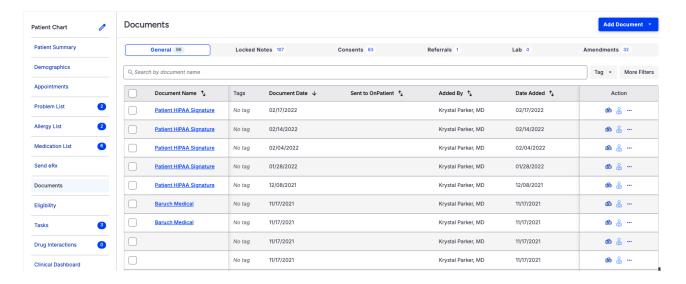
Patient Chart Documents

Last modified on 11/12/2025 5:14 pm EST

Set up tag management permissions | General | Locked Notes | Consents | Referrals | Lab | Amendments | Add a document

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



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.

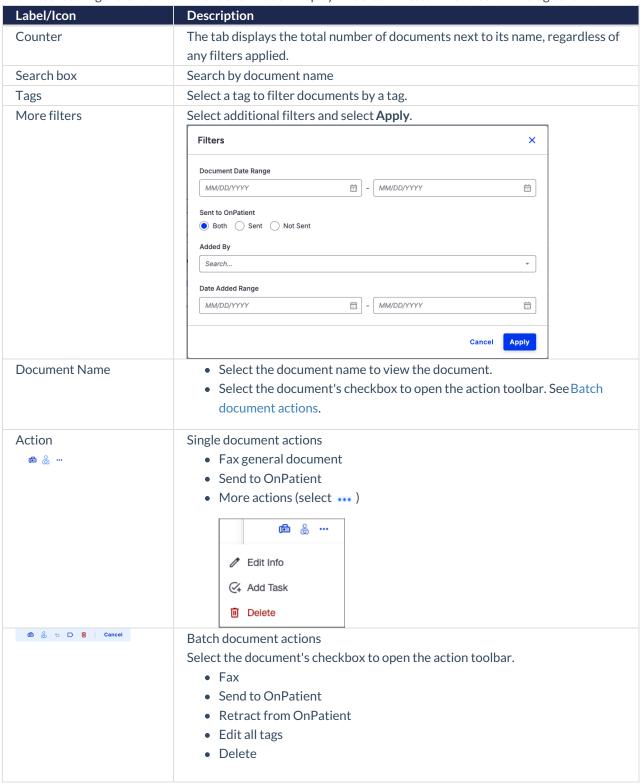
The permissions window opens.

- 3. Select Edit Permissions.
- 4. Select the Manage Form Tags checkbox and then select Save Permissions.
- 8

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.



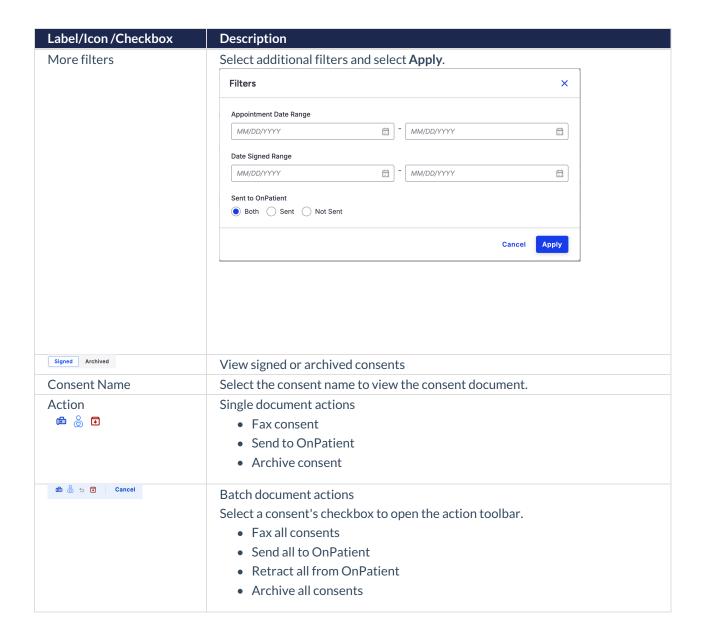
Locked Notes

Lahel/Icon	Description

Label/Icon	Description		
Counter	The tab displays the total number of documents next to its name, regardles any filters applied.	ss of	
Search box	Search by provider name		
More filters	Select additional filters and select Apply .		
	Filters		
	Appointment Date Range		
	MM/DD/YYYY 📋 - MM/DD/YYYY		
	Sent to OnPatient Both Sent Not Sent Not Sent		
	Date Locked Range MM/DD/YYYY □ - MM/DD/YYYY		
	- MINIODITTI		
	Cancel Apply		
Appointment	 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		
6	Fax locked note		
	Send to OnPatient		
	Open note		
de & 5 Cancel	Batch document actions Select the appointment's checkbox to open the action toolbar. • Fax locked notes • Send to OnPatient • Retract from OnPatient		

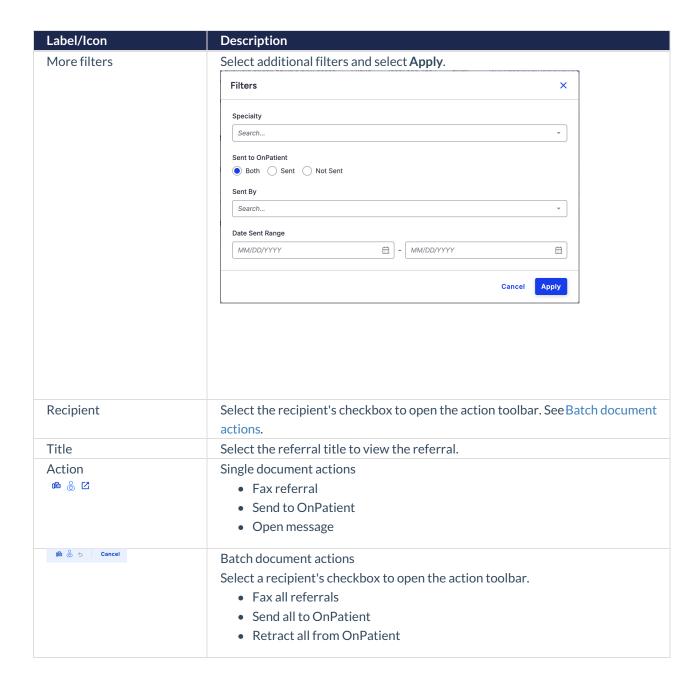
Consents

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



Referrals

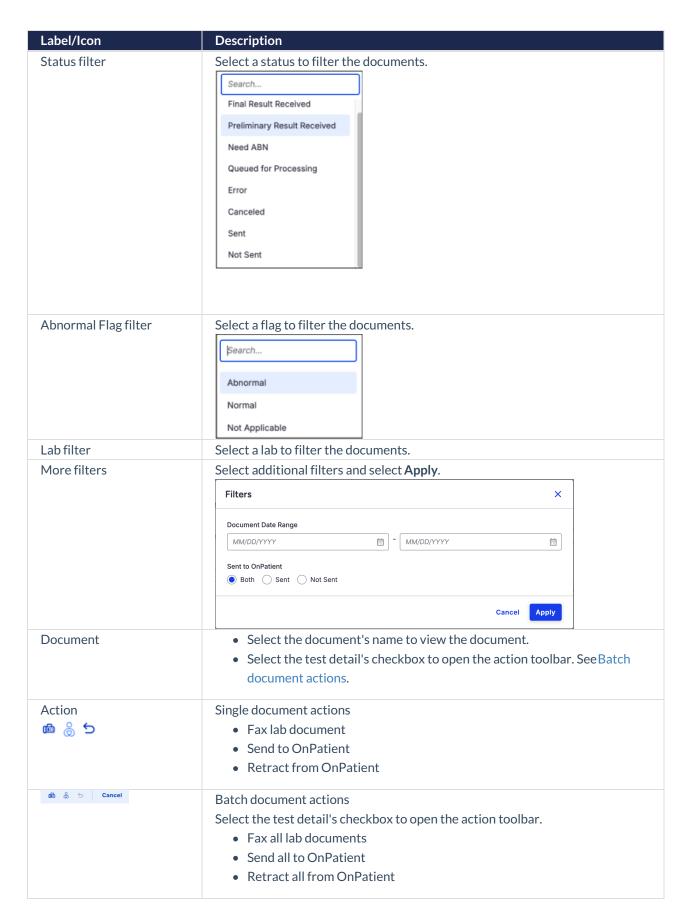
Label/Icon	Description
Counter	The tab displays the total number of documents next to its name, regardless of any filters applied.
Search bar	Search by recipient name



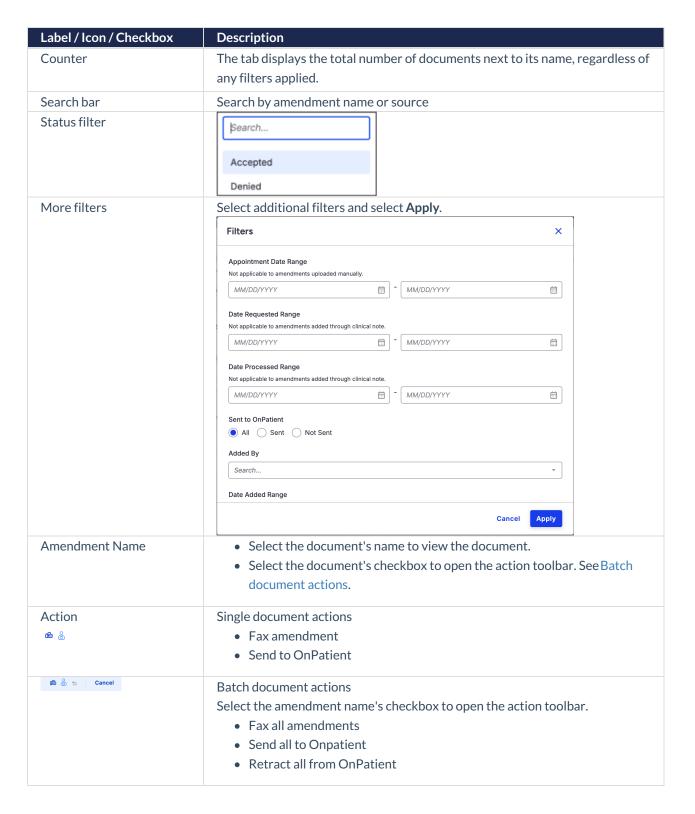
Lab

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



Amendments



Add a document

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



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.

