

# Patient Chart Documents

Last modified on 06/05/2026 3:45 pm EDT

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Select [this link](#) to watch an expanded video with step-by-step instructions

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	Documents						Add Document	
Patient Summary	General 98	Locked Notes 107	Consents 83	Referrals 1	Lab 0	Amendments 32		
Demographics	Q Search by document name						Tag	More Filters
Appointments	Document Name	Tags	Document Date	Sent to OnPatient	Added By	Date Added	Action	
Problem List	<input type="checkbox"/> Patient HIPAA Signature	No tag	02/17/2022		Krystal Parker, MD	02/17/2022		
Allergy List	<input type="checkbox"/> Patient HIPAA Signature	No tag	02/14/2022		Krystal Parker, MD	02/14/2022		
Medication List	<input type="checkbox"/> Patient HIPAA Signature	No tag	02/04/2022		Krystal Parker, MD	02/04/2022		
Send eRx	<input type="checkbox"/> Patient HIPAA Signature	No tag	01/28/2022		Krystal Parker, MD	01/28/2022		
Documents	<input type="checkbox"/> Patient HIPAA Signature	No tag	12/08/2021		Krystal Parker, MD	12/08/2021		
Eligibility	<input type="checkbox"/> Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021		
Tasks	<input type="checkbox"/> Baruch Medical	No tag	11/17/2021		Krystal Parker, MD	11/17/2021		
Drug Interactions	<input type="checkbox"/>	No tag	11/17/2021		Krystal Parker, MD	11/17/2021		
Clinical Dashboard	<input type="checkbox"/>	No tag	11/17/2021		Krystal Parker, MD	11/17/2021		

## Set up tag management permissions

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

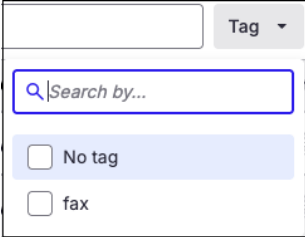
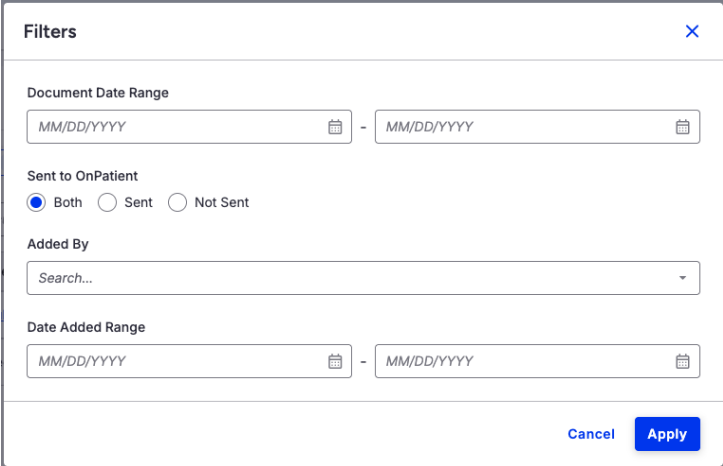

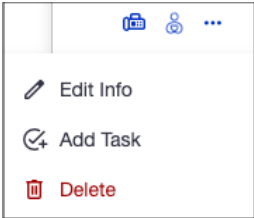

1. Select **Account** > **Staff Permissions** > **Providers or Staff** tab.
2. Select **View** to open the permissions window.
3. Select **Edit Permissions**.
4. Select the **Manage Form Tags** checkbox and then select **Save Permissions**.



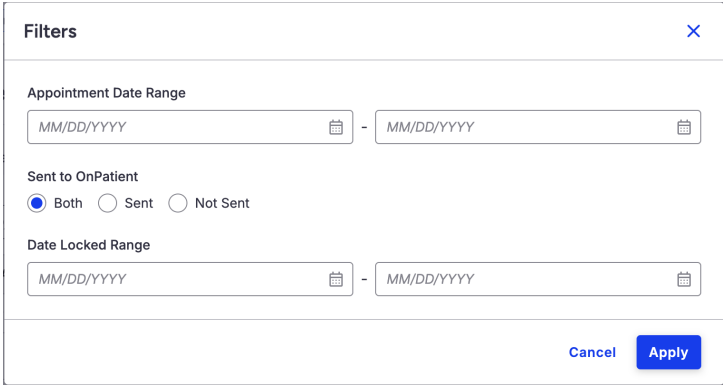


All actions performed (create, update, delete, and read/open) within the **Documents** section of the patient chart are recorded in the clinical audit log.

# 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	Select additional filters and select <b>Apply</b> . 
Document Name	<ul style="list-style-type: none"> <li>• Select the document name to view the document.</li> <li>• Select the document's checkbox to open the action toolbar. See <a href="#">Batch document actions</a>.</li> </ul>
Action 	Single document actions <ul style="list-style-type: none"> <li>• Fax general document</li> <li>• Send to OnPatient</li> <li>• More actions (select <b>...</b>)</li> </ul> 
	Batch document actions Select the document's checkbox to open the action toolbar. <ul style="list-style-type: none"> <li>• Fax</li> <li>• Send to OnPatient</li> <li>• Retract from OnPatient</li> <li>• Edit all tags</li> <li>• Delete</li> </ul>

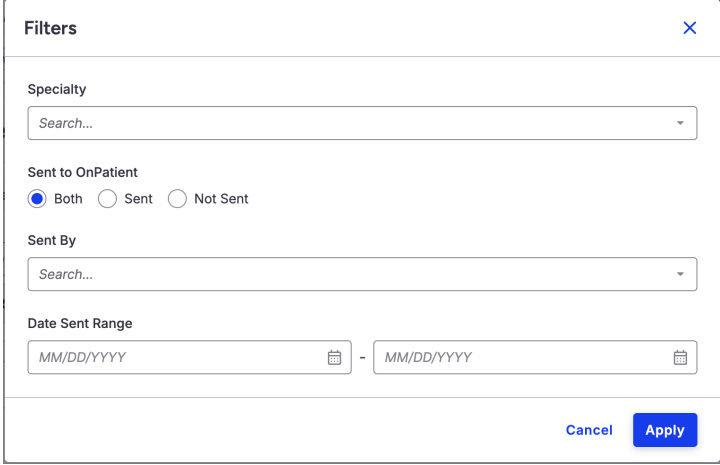


## Locked Notes

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	Select additional filters and select <b>Apply</b> . 
Appointment	<ul style="list-style-type: none"> <li>• Select the appointment to view the locked note.</li> <li>• Select the appointment's checkbox to open the action toolbar. See <a href="#">Batch document actions</a>.</li> </ul>
Action 	Single document actions <ul style="list-style-type: none"> <li>• Fax locked note</li> <li>• Send to OnPatient</li> <li>• Open note</li> </ul>
 Cancel	Batch document actions Select the appointment's checkbox to open the action toolbar. <ul style="list-style-type: none"> <li>• Fax locked notes</li> <li>• Send to OnPatient</li> <li>• Retract from OnPatient</li> </ul>

## 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

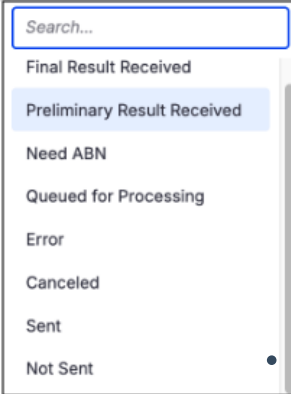
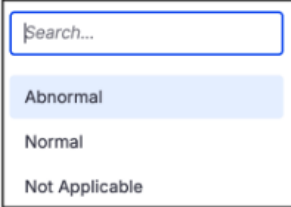


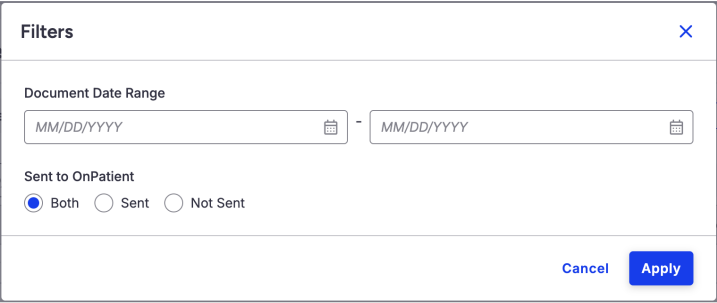


Label/Icon	Description
More filters	<p>Select additional filters and select <b>Apply</b>.</p> 
Recipient	Select the recipient's checkbox to open the action toolbar. See <a href="#">Batch document actions</a> .
Title	Select the referral title to view the referral.
Action 	<p>Single document actions</p> <ul style="list-style-type: none"> <li>• Fax referral</li> <li>• Send to OnPatient</li> <li>• Open message</li> </ul>
 Cancel	<p>Batch document actions</p> <p>Select a recipient's checkbox to open the action toolbar.</p> <ul style="list-style-type: none"> <li>• Fax all referrals</li> <li>• Send all to OnPatient</li> <li>• Retract all from OnPatient</li> </ul>

## Lab

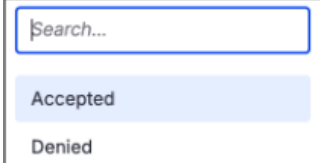
The most recent documents related to the test are shown by default. To access additional lab result documents for the test, select **View All**.



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"> <li>• <b>Final Result Received</b> The lab has completed testing and the final, confirmed result is available.</li> <li>• <b>Preliminary Result Received</b> Early test results are available, but additional testing or review may still be in progress. Results may change.</li> <li>• <b>Need ABN</b> An ABN (Australian Business Number) is required before the lab can continue processing or release results.</li> <li>• <b>Queued for Processing</b> The lab has received the sample or request and will begin testing soon.</li> <li>• <b>Error</b> A problem occurred during processing (for example, missing information or a system issue). Follow-up is required.</li> <li>• <b>Canceled</b> The test was canceled and no results will be produced.</li> <li>• <b>Sent</b> The lab request or results have been successfully sent to the intended recipient.</li> <li>• <b>Not Sent</b> The lab request or results have not yet been sent.</li> </ul>
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 <b>Apply</b>.</p> 
Document	<ul style="list-style-type: none"> <li>• Select the document's name to view the document.</li> <li>• Select the test detail's checkbox to open the action toolbar. See <a href="#">Batch document actions</a>.</li> </ul>
Action 	Single document actions <ul style="list-style-type: none"> <li>• Fax lab document</li> <li>• Send to OnPatient</li> <li>• Retract from OnPatient</li> </ul>
	Batch document actions Select the test detail's checkbox to open the action toolbar. <ul style="list-style-type: none"> <li>• Fax all lab documents</li> <li>• Send all to OnPatient</li> <li>• Retract all from OnPatient</li> </ul>

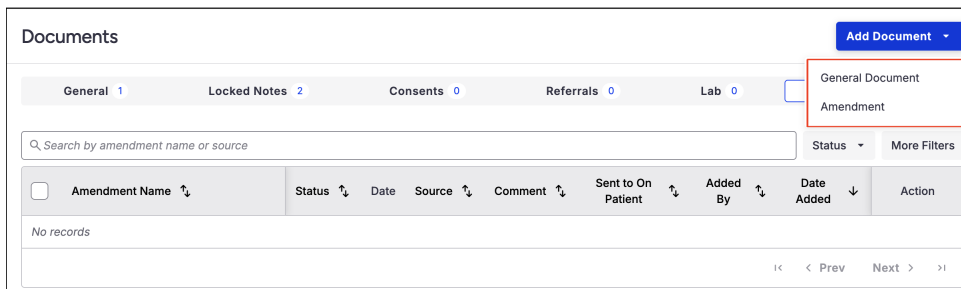
## Amendments

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 <b>Apply</b>.</p> <div data-bbox="539 230 1257 869" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Filters</b> <span style="float: right;">✕</span></p> <hr/> <p><b>Appointment Date Range</b> Not applicable to amendments uploaded manually.</p> <p><input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/></p> <p><b>Date Requested Range</b> Not applicable to amendments added through clinical note.</p> <p><input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/></p> <p><b>Date Processed Range</b> Not applicable to amendments added through clinical note.</p> <p><input type="text" value="MM/DD/YYYY"/> <input type="text" value="MM/DD/YYYY"/></p> <p><b>Sent to OnPatient</b></p> <p><input checked="" type="radio"/> All <input type="radio"/> Sent <input type="radio"/> Not Sent</p> <p><b>Added By</b></p> <p><input type="text" value="Search..."/></p> <p><b>Date Added Range</b></p> <p style="text-align: right;"><span>Cancel</span> <span style="background-color: #0056b3; color: white; padding: 2px 10px; border-radius: 4px;">Apply</span></p> </div>
Amendment Name	<ul style="list-style-type: none"> <li>• Select the document's name to view the document.</li> <li>• Select the document's checkbox to open the action toolbar. See <a href="#">Batch document actions</a>.</li> </ul>
Action 	Single document actions <ul style="list-style-type: none"> <li>• Fax amendment</li> <li>• Send to OnPatient</li> </ul>
	Batch document actions Select the amendment name's checkbox to open the action toolbar. <ul style="list-style-type: none"> <li>• Fax all amendments</li> <li>• Send all to Onpatient</li> <li>• Retract all from OnPatient</li> </ul>

## 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 or add multiple files.
  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**.
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