

How to create a form tag

07/24/2024 5:10 pm EDT

DrChrono has added an enhancement to create and filter existing forms using a tag method.

This enhancement will allow a user to

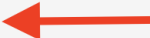
- add a tag to a form.
- locate or organize their forms based on the tags assigned.
- search for a form using a tag.

The tag method can be helpful for practices ...

- that use “smart fields” and “reference fields” within a form to maintain an organized workflow for the clinical note.
- with forms that are to be completed by specific users.
- with a large number of custom forms.

Enabling Form Tags Permissions

1. Enabling this permission will allow the user to create and delete form tags. If the permission is not enabled, users will only be able to "add and remove tags".
2. Navigate to Account
3. Staff Permissions
4. Choose Providers or Staff tab, then click view
5. Edit Permissions
6. Choose Manage Templates
7. Save Permissions

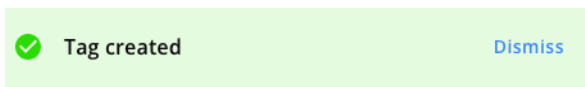
Manage Form Tags ⓘ		<input type="checkbox"/>
Manage Accounts ⓘ		<input checked="" type="checkbox"/>
Show Patient Balance ⓘ		<input checked="" type="checkbox"/>
Show Billing Tab ⓘ		<input checked="" type="checkbox"/>

How to create a tag

1. Hover over Clinical
2. Click Tag Management (under the Form Tools section)
3. Click "+New Tag", and a Create New Tag pop-up box will appear

4. Create a Tag Name > click Create

5. A pop-up will appear confirming that the Tag has been created



As form tags are created, the search box can be used to filter through the list. Multiple tags can be searched simultaneously.

To Edit/Archive a tag

- Within the form list under the Action column (pencil icon = edit, folder = archive)

Name	Form Usage	Creator	Last Modified	Action
New Patient Intake Form	0 forms	K Parker, MD	07/11/2023	 

How to view current and archived tags

- Hover or Clinical > Tag Management.
- Tags that are in use are located under the Current Tab.
- Archived tags are located under the Archived Tab.
- To unarchive a tag, click the icon under the actions column.

Tag Management

[+ New Tag](#)

You can create, edit or archive tags. You can also check which forms are currently associated with a specific tag.

[Current](#) [Archived](#)

Name

Name	Form Usage	Creator	Last Modified	Action
No results				

Adding a tag to an existing or new form

- Navigate to Clinical > Form Builder (beta).
- Click the pencil icon to edit the form or click New Form.
- Click the gear icon beside the form title.
- Click edit form info.
- Search tag name.
- Click update.

The screenshot shows the 'Acupuncture SOAP Follow-Up' form editor. The form content includes a rating scale question, a test instruction, and three text input fields labeled 'TTest', 'Subjective', and 'History of Present Illness'. A gear icon next to the form title opens a menu with options: 'Make Form Persistent', 'Hide Form Name Header', 'Set as Default Form', 'Exclude from Complete Note', 'Edit Form Info', 'Duplicate Form', 'Set as Workflow Form', 'Clear Form', and 'Archive Form'. A red arrow points from the gear icon to the 'Edit Form Info' option. Below the form, the 'Edit Form Info' modal is open, showing the 'Form Name' as 'Acupuncture SOAP Follow-Up', 'Form Type' as 'None', and 'Tags' as 'New Patient Intake Form'. An 'Update' button is located at the bottom right of the modal.

Acupuncture SOAP Follow-Up

4. Please rate the following on a scale of 0-10 with 0 being NONE and 10 being the WORST

This is only a test

TTest

Subjective

History of Present Illness

Edit Form Info

Form Name

Form Type

Tags

[Update](#)