How do I create tags to attach to a patient document?

07/24/2024 3:55 pm EDT

A great way to filter a search in a patient's history is by using Tags. These are keywords that you set within the DrChrono platform to search by. Tags are completely customizable and you can name them whatever you would like. You are given suggestions when you start typing, but they are only suggestions, you are not required to use them. You will see the benefits of using Tags fairly quickly when added to your already existing workflow.

You can add tags in two places: while you are uploading the document or after you have uploaded them.

1. You need to first navigate to a patient's chart by **searching** for the patient or going to **Patients** > **Patient List** and selecting the patient.

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						PATIENT									-					_
0		Jul	~	· 2	020	Patient List	oday	C Refres	Print App	ots			Jul 19 2020 - Jul 25	••			Daily	Exam Rooms	Do	ctor V
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28	2	29	30	1	2	Patient Groups	_													
5	е	6	7	8	9 -	Send Email														
12	1	13	14	15	16 1	Send Referral														

2. Once in the chart, select Documents from the side menu.

+ Add new patient		Laurie Sample (Female	e 31 years old Dec. 8,	1990) 🥒				SA	JA00000		
Demographics		Phone:	Email:		Date Added:						
Appointments		Address: 328 Gibraltar Dr Sunnyvale , CA 9408	39		Last Scheduled Appt: lext Scheduled Appt:						
Clinical Dashboard		CDS: Adult Immunization	Schedule Age: 27-49								
Documents	I	New Referral Fax Demographics	Print Demographics				Vitals + Sched	ule New Appo	pintment		
Eligibility	Upload images, scanned paper	documents, or PDEs downloaded	from other electronic m	edical records							
Tasks 6	s I I Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.										
Problem List	Uploaded Documents Locked Clinical Notes Signed Consent Forms Outbound Referrals Lab Results Amendments 1										
Medication List							Select Files to Upload	C Syncing	a with how		
Send eRx	Add new documents for t	his patient					Select Files to Opioad	Syncing	, with box		
Allergy List NKDA											
Drug Interactions 6				Drop files anywhere onto t	his page				ad Files		
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Lab Orders	Document Tags										
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Growth Charts	Uploaded Documents										
onpatient Access	Date	Description	Additional URL	Document Tags	Uploaded on	Actions					
Education Resources	02/22/2022	Lab Results from Patient	Additional URL	onpatient labs	02/22/2022	ACIUITS	Send to onpatient	Fax + Task	/ ×		
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Family History	01/11/2022	TEST			01/11/2022		Send to onpatient	Fax + Task	. / x		

3. You can click on **Select Files to Upload** to bring up a window that allows you to navigate to the file you would like to upload, or you have the option to **drag and drop** the file into the box on the screen.

		iCloud Drive		Search	omas Your 👻	
tients R	Favorites	Name	Date Modified v S	Size		■ 2 ⁶² = 1 +
_	Recents	Desktop	Today at 1:21 PM			
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		Documents	Feb 21, 2018 at 3:52 PM			0061643792
ſ c Uploac	Desktop	Numbers	Feb 21, 2018 at 3:51 PM			
	Downloads	Pages	Feb 21, 2018 at 12:58 PM		Date Added:	Oct. 20, 2016
I vploac	101	Preview	Feb 20, 2018 at 9:10 AM		eduled Appt:	Fri Mar 02, 2018
	iCloud	TextEdit	Feb 20, 2018 at 9:10 AM			
	iCloud Drive					
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	Craig's MacB					
Add r	Options		Cancel	Open	J	Select Files to Upload
		Drop fil	les anywhere onto this page			Upload Files

4. Select **Click to add metatags** directly under the description to start adding tags to the document. You are given suggestions once you start typing, but tags are 100% customizable so please don't feel you must use what is suggested. Click on **Upload Files** to complete the process.

Add	d new c	documents for this patient	Add new documents for this patient	
F	Hand X-ray	k	Hand X-ray	
Та	ags	click to add metatags	Tags xray × imaging	
D	late	04/01/2022	Date 04/01/2022	

You can also add or edit tags after you have uploaded a document. Click on the (

) icon											
	ent Tags	│labs x1 │ free draw embed x14 │ free dra	uu ut l'annations at l'document a	d loado vá All Documento						4	0
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	Date	Description	Additional URL	Document Tags	Uploaded on	Actions					
dr	04/01/2022	xray.jpg			04/01/2022		C Send to onpatient	Fax	+ Task	/	×
dr	04/01/2022	Lab Results.pdf			04/01/2022		C Send to onpatient	Fax	+ Task	1	×
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dr	03/04/2022	CCDA		c-cda imported	03/04/2022		E Send to onpatient	Fax	+ Task	1	×

Enter the tags and click **Update Document**.

Update Document Information

Date Description	04/01/2022 Hand X-ray	
Tags	xray × imaging	+
Close		Update Document

You will now be able to filter documents by the tags you set up. Simply click on the tag to filter.

Do	ocument Tags												
fai	fax x1 imported x1 photo x1 xray x2 labs x1 free draw embed x14 free draw x1 onpatient x1 document x1 c-cda x1 imaging x1 All Documents												
U	Uploaded Documents												
	Date	Description	Additional URL	Document Tags	Uploaded on	Actions							
	04/01/2022	Hand X-ray		xray imaging	04/01/2022		C Send to onpatient	Fax	+ Task	/	×		
	02/28/2022	X-ray		xray photo	02/28/2022		C Send to onpatient	Fax	+ Task		×		

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