## 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									-					_
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28	29	30	1	2	Patient Groups														
5	6	7	8	9	· Send Email														
12	13	14	15	16	. Send Referral														
12	10	14	10	10															

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:	Jan. 4, 2022					
Appointments		Address: 328 Gibraltar Dr Sunnyvale , CA 940	89	l N	Last Scheduled Appt: Next Scheduled Appt:	Mon Jan 31, 2022 Fri Feb 11, 2022					
Clinical Dashboard		CDS: Adult Immunization	Schedule Age: 27-49								
Documents	I I I I I I I I I I I I I I I I I I I	New Referral Fax Demographics	Print Demographics				Vitals + Sched	lule New App	pintment		
Eligibility	Upload images, scanned paper	documents or PDEs downloaded	from other electronic m	nedical records							
Tasks 6	opieta inageo, esantes paper										
Problem List	Uploaded Documents Locked	d Clinical Notes Signed Consent For	ms Outbound Referrals	Lab Results Amendme	ents 🕕						
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Send eRx	Add new documents for f	this patient					Select Files to Opload	Syncin	y with bo		
Allergy List NKDA											
Drug Interactions 5				Drop files anywhere onto t	his page						
CQMs								Upic	ad Files		
Intake Data	Description Trans										
Lab Orders	Document lags										
Immunizations	labs x1 fax x1 free draw embed x1	3 free draw x1 onpatient x1 document	x1 All Documents								
Growth Charts	Uploaded Documents										
onpatient Access	Data	Description	Additional LIRI	Document Tags	Uploaded on	Actions					
Education Resources	02/22/2022	Lab Results from Patient	Additional ORL	onpatient labs	02/22/2022	ACIONS	Send to onpatient	Fax + Task			
Communication	01/21/2022	Free Hand Drawing		free draw	01/21/2022		Send to onpatient	Fax + Task			
Family History	01/11/2022	TEST			01/11/2022		Send to onpatient	Fax + Task			

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 👻	Thomas Your (tyour)
tients R	Favorites	Name	Date Modified V	Size		■ 2 <sup>62</sup> = 1 +
_	Recents	Desktop	Today at 1:21 PM			
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		Documents	Feb 21, 2018 at 3:52 PM			0061643792
	Desktop	Numbers	Feb 21, 2018 at 3:51 PM			
	Downloads	Pages	Feb 21, 2018 at 12:58 PM		Date Added:	Oct. 20, 2016
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l	Documents	F C TextEdit	Feb 20, 2018 at 9:10 AM			
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œ٥	Desktop				+ Sch	edule New Appointment
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	Craig's MacB					
Add r	Options		Cancel	Open	J	Select Files to Upload
		Drop fil	es 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.

Ad	d new c	documents for this patient	Add new documents for this patient						
	Hand X-ra	k	Hand X-ray						
	Tags	click to add metatags	Tags xray × imaging +						
	Date	04/01/2022	Date 04/01/2022						

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

) icon.											
_											
Docume	ent Tags										
fax x1 im	ported x1 [ photo x1 ]	labs x1 ] free draw embed x14 ] free draw x1	I onpatient x1 document x	I c-cda x1 All Documents						g	r
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đr	04/01/2022	xray.jpg			04/01/2022		C Send to onpatient	Fax	+ Task		×
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66	03/04/2022	CCDA		c-cda imported	03/04/2022		C Send to onpatient	Fax	+ Task		×

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.

D	Document Tags											
fa	fax x1 imported x1 photo x1 xray x2 labs x1 free draw embed x14 free draw x1 onpatient x1 document x1 c-cds 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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