

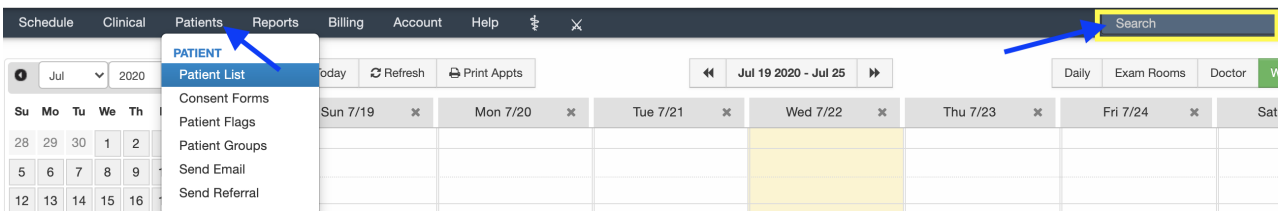
# How do I create tags to attach to a patient document?

07/24/2024 3:55 pm EDT

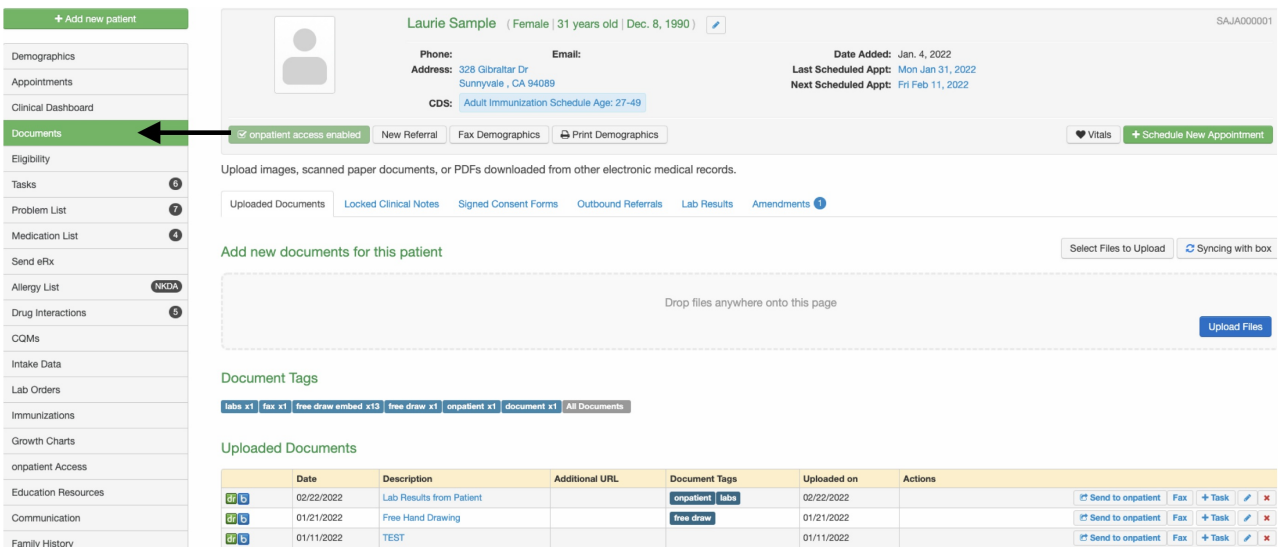
A great way to filter a search in a patient's history is by using Tags. These are keywords that you set within the DrChrono platform to search by. Tags are completely customizable and you can name them whatever you would like. You are given suggestions when you start typing, but they are only suggestions, 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.

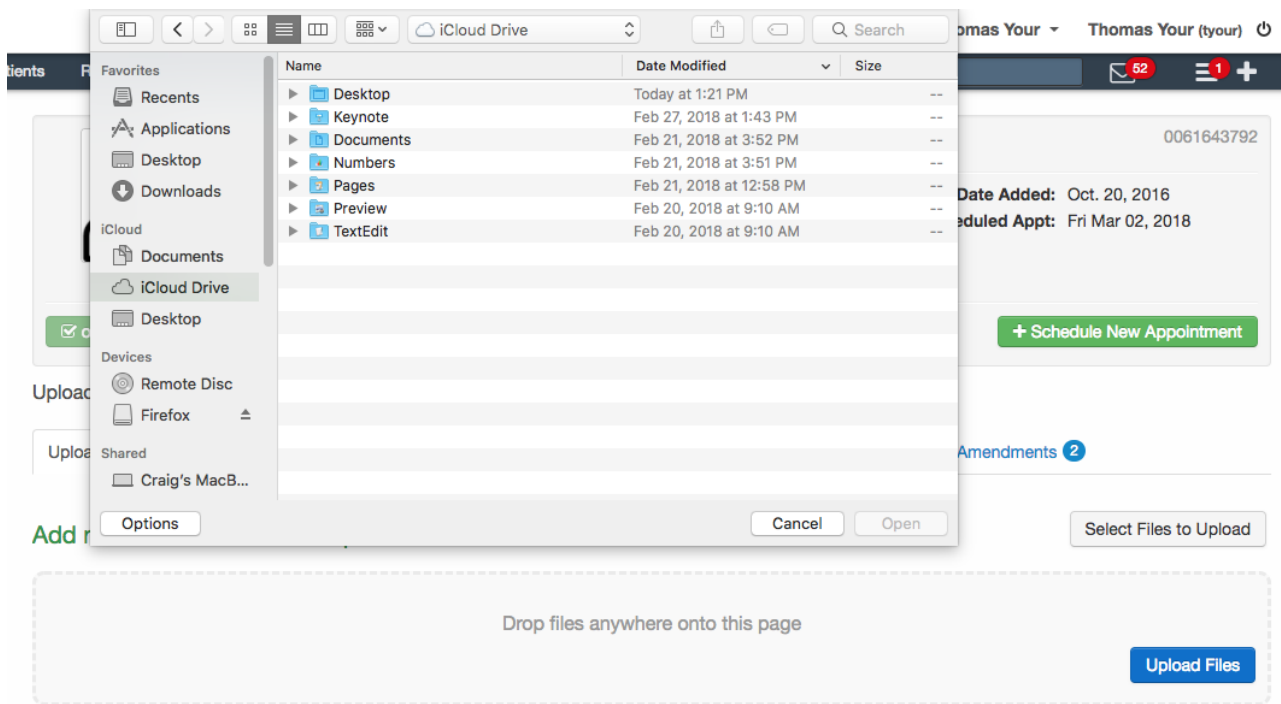
1. You need to first navigate to a patient's chart by **searching** for the patient or going to **Patients > Patient List** and selecting the patient.



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



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.



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 new documents for this patient

Hand X-ray

Tags [click to add metatags](#)

Date

#### Add new documents for this patient

Hand X-ray

Tags

Date

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



) icon.

#### Document Tags

fax x1 imported x1 photo x1 labs x1 free draw embed x14 free draw x1 onpatient x1 document x1 c-cda x1 All Documents

#### Uploaded Documents

	Date	Description	Additional URL	Document Tags	Uploaded on	Actions
	04/01/2022	xray.jpg			04/01/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a>
	04/01/2022	Lab Results.pdf			04/01/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a>
	03/08/2022	Freedraw [Clinical Note]		free draw embed	03/08/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a>
	03/04/2022	CCDA		c-cda imported	03/04/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a>



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

## Update Document Information



Date

Description

Tags

Close

Update Document

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

### Document Tags

[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](#)

### Uploaded Documents

Date	Description	Additional URL	Document Tags	Uploaded on	Actions
04/01/2022	<a href="#">Hand X-ray</a>		<a href="#">xray</a> <a href="#">imaging</a>	04/01/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a> <a href="#">✕</a>
02/28/2022	<a href="#">X-ray</a>		<a href="#">xray</a> <a href="#">photo</a>	02/28/2022	<a href="#">Send to onpatient</a> <a href="#">Fax</a> <a href="#">+ Task</a> <a href="#">✕</a>