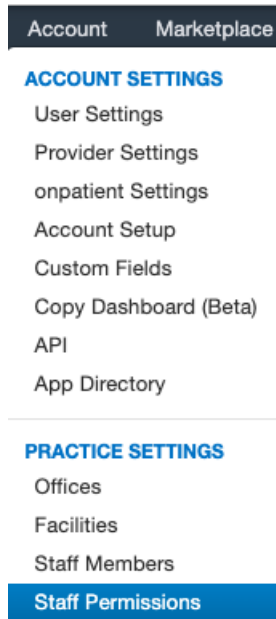# Archiving Signed Consent Forms

07/24/2024 12:29 pm EDT

You may need to archive a signed consent form for a patient if it was incorrectly signed or accidentally duplicated. You can do so with the archive consent forms feature.
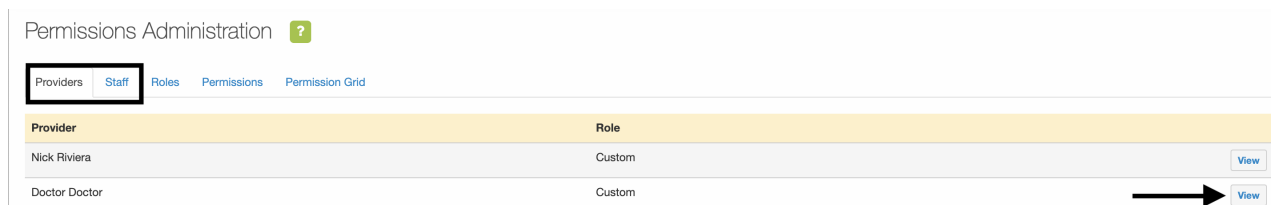
To begin, ensure the permission is enabled.

- Go to **Account** > **Staff Permissions**.

- Click **View** next to the staff member or provider who needs the permission enabled.

- Click **Edit Permissions**. Check the box next to the Archive Signed Consent Forms permission and **Save Permissions**.

Permissions for Dr. James Smith ✕

Role: Custom

Permissions	
Create and Update Patients ⓘ	☑
Access Scheduling ⓘ	☑
Appointment Provider Selection ⓘ	☑
Use iPad EHR ⓘ	☑
Access to Message Center ⓘ	☑
Create and Update Contacts ⓘ	☑
Access Clinical Notes ⓘ	☑
Archive Signed Consent Forms ⓘ	☐
Sign/Lock Clinical Notes ⓘ	☑

Close   Edit Permissions

Permissions for Dr. James Smith ✕

Role: Custom

Permissions	
Create and Update Patients ⓘ	☑
Access Scheduling ⓘ	☑
Appointment Provider Selection ⓘ	☑
Use iPad EHR ⓘ	☑
Access to Message Center ⓘ	☑
Create and Update Contacts ⓘ	☑
Access Clinical Notes ⓘ	☑
Archive Signed Consent Forms ⓘ	☑
Sign/Lock Clinical Notes ⓘ	☑

Close   Save Permissions

- To archive a consent form, go to the patient's chart and navigate to the **Documents** section. Select the Signed Consent Forms tab. Find the signed consent form you need to archive and click **Archive Consent Form**.

- If needed, enter a reason. Click **Archive Consent From** to continue.

Consent Form Archiver ✕

Are you sure you wish to archive the consent form:
"No Show Policy"
for appointment on:
May 18, 2022 8:10 a.m.?

Reason (Optional):

Archive Consent Form

- You will see a message that the form has been archived. Click the X to close.

Consent Form Archiver ✕

Consent form has been Archived.

The archived consent form will appear in the Archived Signed Consent Forms section.

+ Add new patient

Demographics
Appointments
Clinical Dashboard ⚠
Documents
Eligibility
Tasks 0
Problem List ⚠
Medication List ⚠
Send eRx
Allergy List 0
Drug Interactions 3
CQMs
Intake Data
Lab Orders
Immunizations

Michelle (Shelly) S. Harris (Female | 23 years old | Oct. 14, 1999) ✎   HAMI000006

Phone: (443) 555-5555   **Email:** sample@sample.com   **Date Added:** Oct. 21, 2021
Address: 123 Fake St   **Last Scheduled Appt:** Mon Jun 13, 2022
Sunnyvale , CA 94089   **Next Scheduled Appt:**
CDS: Patient must have documented allergies   Adult Immunization Schedule Age: 22-26

☑ onpatient access enabled   New Referral   Fax Demographics   🖶 Print Demographics   Apple Health App Data   ♥ Vitals   + Schedule New Appointment

Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.

Uploaded Documents   Locked Clinical Notes   **Signed Consent Forms**   Outbound Referrals   Lab Results   Amendments

Signed Consent Forms

Consent Form	Date of Appointment	Date of Signature	Actions			
HIPAA Data Use Agreement	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form	Fax Signature	� Send to onpatient	Archive Consent Form
HIPAA Data Use Agreement	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form	Fax Signature	� Send to onpatient	Archive Consent Form
No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form	Fax Signature	� Send to onpatient	Archive Consent Form

Archived Signed Consent Forms

Archived Consent Form	Date of Appointment	Date of Signature	Date Archived	Reason	Actions
No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Apr 04, 2023 1:33 PM	testing for reason	Unarchive Consent Form

If you need to unarchive a signed consent form, click the **Unarchive Consent Form** button.

+ Add new patient

Demographics
Appointments
Clinical Dashboard ⚠
Documents
Eligibility
Tasks 0
Problem List ⚠
Medication List ⚠
Send eRx
Allergy List 0
Drug Interactions 3
CQMs
Intake Data
Lab Orders
Immunizations

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Signed Consent Forms

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HIPAA Data Use Agreement	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form	Fax Signature	� Send to onpatient	Archive Consent Form
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Archived Signed Consent Forms

Archived Consent Form	Date of Appointment	Date of Signature	Date Archived	Reason	Actions
No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Apr 04, 2023 1:33 PM	testing for reason	Unarchive Consent Form ⬅

Enter a reason, if needed. Click **Unarchive Consent Form** to continue.

Consent Form Archiver ✕

Are you sure you wish to unarchive the consent form:
"No Show Policy"
for appointment on:
May 18, 2022 8:10 a.m.?

Reason (Optional):   Unarchive reason

Unarchive Consent Form

You will see a message that the form has been unarchived. Click the X to close.

Consent Form Archiver   ✕

Consent form has been Unarchived.

All of the activities will be tracked in the Audit Log (Clinical > Audit Log).

Audit Log Report

Patient's Name ⬇		Username		(All log types) ∨	04/10/2023	04/17/2023	Update Filter			View Last:	Day	Week	Month	Year

Export to File   PAGE 1 →

Date ⬇	Time	Patient	User	Type	Action	Details	IP
04/17/2023	07:43:07 AM		258700 (sampletraining)	Navigation View	Read	accessed Appointment Status Section (from "Schedule" tab > "Appointment Profiles" tab)	10.
04/17/2023	07:43:06 AM		258700 (sampletraining)	Navigation View	Read	accessed Calendar Section (from "Schedule" tab > "Calendar" tab)	10.
04/17/2023	07:41:40 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Chart	Update	Update -> Chart: Unarchive signed consent form 'HIPAA Data Use Agreement', reason: testing for unarchive	10.
04/17/2023	07:41:26 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Chart	Delete	Delete -> Chart: Archive signed consent form 'HIPAA Data Use Agreement', reason: testing for archive	10.
04/17/2023	07:41:00 AM	98226976 (Michelle (Shelly) S. Harris) [HAMI000006]	258700 (sampletraining)	Navigation View	Read	accessed Documents Section (from "Patient Dashboard" tab > "Documents" tab)	10.