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.

Account	Marketplace
ACCOUNT	SETTINGS
User Settin	ngs
Provider S	ettings
onpatient	Settings
Account S	etup
Custom Fi	elds
Copy Dasl	nboard (Beta)
API	
App Direct	tory
PRACTICE	SETTINGS
Offices	
Facilities	
Staff Mem	bers
Staff Perm	issions

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

Permissions Administration 🔋		
Providers Staff Roles Permissions Permission Grid		
Provider	Role	
Nick Riviera	Custom	View
Doctor Doctor	Custom	View

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

Permissions for Dr. James Smith	×	Permissions for Dr. James Smith	×
Role: Custom ~		Role: Custom ~	
Permissions		Permissions	
Create and Update Patients ()		Create and Update Patients 0	
Access Scheduling 🚯		Access Scheduling 0	
Appointment Provider Selection 1		Appointment Provider Selection ()	
Use iPad EHR 🚯		Use iPad EHR	Image: A start of the start
Access to Message Center		Access to Message Center 1	
Create and Update Contacts 0		Create and Update Contacts 0	~
Access Clinical Notes 0		Access Clinical Notes 0	
Archive Signed Consent Forms		Archive Signed Consent Forms 0	
Sign/Lock Clinical Notes 6		Sign/Lock Clinical Notes 6	
Close Edit Perr	missions	Close Save Permis	sions

• 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**.

+ Add new patient			Michelle (Shelly) S.	Harris (Female 23	years old Oct. 14, 1999))		HAMI000006
Demographics Appointments			Phone: (443) 555-5555 Address: 123 Fake St Sunnyvale , CA	Email: sample@san	ple.com Dat Last Schedu Next Schedu	te Added: Oct. 21, 2021 Jed Appt: Mon Jun 13, 2022 Jed Appt:		
Clinical Dashboard	0		CDS: Patient must n	ave documented allergies	Adult Inimunization Schedu	uie Age. 22-20		
Documents		access enabled	New Referral Fax Den	nographics 🔒 Print Der	nographics	Apple Health App Data	Vitals + Sche	dule New Appointment
Eligibility		Unload images scanned pape	er documents of RDFs d	ownloaded from other e	lectronic medical records	2		
Tasks	0	opious integeo, osainos papo						
Problem List	0	Uploaded Documents Locke	d Clinical Notes Signed	Consent Forms Outbou	nd Referrals Lab Results	Amendments		
Medication List	0							
Send eRx		Signed Consent Forms						
Allergy List	0	Consent Form	Date of Appointment	Date of Signature	Actions			
Drug Interactions	0	HIPAA Data Use Agreement	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form Fax S	Signature C Send to onpatient	Archive Consent Form	
Drug Interactions	•	HIPAA Data Use Agreement	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax	Signature C Send to onpatient	Archive Consent Form	
CQMs		No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax S	Signature C Send to onpatient	Archive Consent Form	
Intake Data		No Show Policy	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form Fax S	Signature C Send to onpatient	Archive Consent Form	
Lab Orders		Archived Signed Conser	nt Forms					
Immunizations		Archived Consent Form	Date of Ap	opointment	Date of Signature	Date Archived	Reason	Actions

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

Consent Form Archiver				
Reason (Optional):	Are you sure you wish to archive the consent form: "No Show Policy" for appointment on: May 18, 2022 8:10 a.m.?			
	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.

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

+ Add new patie	nt		Michelle (Shelly) S.	Harris (Female 23 yes	ars old Oct. 14, 1999) 🥒		HAMI00006	
Demographics			Phone: (443) 555-5555 Address: 123 Fake St	Email: sample@sample	.com Date Added	: Oct. 21, 2021		
Appointments		Jakon 1	Sunnyvale , CA	94089	Next Scheduled Appt	:		
Clinical Dashboard	•		CDS: Patient must ha	ave documented allergies A	dult Immunization Schedule Age: 2	22-26		
Documents		✓ onpatient access enabled	New Referral Fax Dem	ographics Print Demog	graphics	ople Health App Data	Vitals + Schedule New Appointment	
Eligibility		Lipload images, scanned pape	ar documents, or PDEs do	wnloaded from other elec	tronic medical records			
Tasks	0	opidad images, scamed pape	a documenta, or r br a do	Swilloaded from other elec	aone medicarrecords.			
Problem List	0	Uploaded Documents Locke	d Clinical Notes Signed C	Consent Forms Outbound	Referrals Lab Results Amer	ndments		
Medication List	•							
Send eRx		Signed Consent Forms						
Allergy List	0	Consent Form	Date of Appointment	Date of Signature	Actions			
Deve Internetione		HIPAA Data Use Agreement	May 18, 2022 8:10 AM	May 17, 2022 9:26 AM	Fax Consent Form Fax Signature	C Send to onpatient A	rchive Consent Form	
Drug Interactions	0	HIPAA Data Use Agreement	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax Signature	C Send to onpatient A	Archive Consent Form	
CQMs		No Show Policy	May 18, 2022 8:00 AM	May 17, 2022 8:22 AM	Fax Consent Form Fax Signature		ient Archive Consent Form	
Intake Data		Archived Signed Conser	nt Forms					
Lab Orders		Archived Concert Form	Data of Annointment	Data of Simohum	Data Arabinad	Person	Antinua	
Immunizations		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	
Oursette Objecte								

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 type	es) ~	04/10/2023	04/1	7/2023 Update Filter View Last: Day Week Mo	onth Ye	'ear		
Export to	File					P	AGE 1	÷		
Date 🆊	Time	Patient	User	Туре	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.		