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 Settir	ngs					
Provider S	Provider Settings					
onpatient	Settings					
Account S	etup					
Custom Fi	elds					
Copy Dasł	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 0		Create and Update Patients ()	
Access Scheduling 0	V	Access Scheduling ()	
Appointment Provider Selection 1		Appointment Provider Selection ()	
Use iPad EHR 🚯		Use iPad EHR 1	
Access to Message Center 6		Access to Message Center 1	
Create and Update Contacts 0		Create and Update Contacts 1	
Access Clinical Notes		Access Clinical Notes 0	Z
Archive Signed Consent Forms 1		Archive Signed Consent Forms	
Sign/Lock Clinical Notes 0		Sign/Lock Clinical Notes 1	
		Close Save F	Permissions
Close Edit Perm	nissions		

• 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**.

			Phone: (443) 555-555	5 Email: sample@sam	inle com	Date Added:	Oct 21 2021			
Demographics			Address: 123 Fake St	Cinal. Samplessam			Mon Jun 13, 2022			
Appointments		ALLAN T	Sunnyvale , C	A 94089	Next Sci	heduled Appt:				
Clinical Dashboard	0		CDS: Patient must	have documented allergies	Adult Immunization So	chedule Age: 22-	26			
	•	access enabled	New Referral Fax De	emographics 🕒 Print Dem	nographics	Appl	le Health App Data	♥ Vitals	+ Schedule	New Appointme
Eligibility		Upload images, scanned pa	por documento o RDEo	downloaded from other el	lastronia madical roa	ordo				
Tasks	0	opioau images, scanneu pa	per documents, or opro-	downloaded from other en	lectronic medical rec	orus.				
Problem List	0	Uploaded Documents Loci	ked Clinical Notes Signed	Consent Forms Outbour	nd Referrals Lab Res	sults Amendr	ments			
Problem List Medication List	0			Consent Forms Outbour	nd Referrals Lab Re	sults Amendr	ments			
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	-	Signed Consent Forms Consent Form HIPAA Data Use Agreement HIPAA Data Use Agreement No Show Policy	Date of Appointment May 18, 2022 8:00 AM May 18, 2022 8:10 AM	Date of Signature May 17, 2022 9-26 AM May 17, 2022 8-22 AM May 17, 2022 8-22 AM	Actions Fax Consent Form Fax Consent Form Fax Consent Form	Fax Signature [Fax Signature [Fax Signature [면 Send to onpatient 면 Send to onpatient 면 Send to onpatient	Archive Conse Archive Conse	nt Form	_

• 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	ient		Michelle (Shelly) S	. Harris (Female 23 ye	ars old Oct. 14,	1999) 🥒			HAMI000
Demographics			Phone: (443) 555-555 Address: 123 Fake St	5 Email: sample@sampl			Oct. 21, 2021 Mon Jun 13, 2022		
Appointments		All and a second se	Sunnyvale, C	A 94089		Scheduled Appt:			
Clinical Dashboard	•		CDS: Patient must	have documented allergies	Adult Immunization	Schedule Age: 2	2-26		
		✓ onpatient access enabled	New Referral Fax De	emographics 🔒 Print Demo	graphics	Ap	ple Health App Data	Vitals	+ Schedule New Appointme
Eligibility		Upload images, scanned pape	ar documents or PDEs	downloaded from other ele	stronic medical r	acorde			
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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 Lo	g Report								
Patient	s Name	Username	(All log type	es) ~	04/10/2023	04/1	7/2023 Update Filter View Last: Day Week M	Nonth	Year
Export to File								PAGE 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) [I	HAMI000006]	258700 (sampletraining)	Navigation View	Read	accessed Documents Section (from "Patient Dashboard" tab > "Documents" tab)		10.