

Renaming Patient Documents Folder Tab

This is a 3-step process; you will need to make a new tab with the “**New Tab Name**” you want, then move all the documents from the “**Old Tab Name**” to the “**New Tab Name**”, then clear the “**Old Tab Name**”.

- 1) Contact Data Tec for the current **Special Password**.

Create New Tab Heading

From the Documents folder on any patient.

- 1) Use the top toolbar “**Tools**” option then “**Tab Heading Definitions**”, enter the special password.
- 2) Type in your “**New Tab Name**” in a blank “**Folder Tab Description**” field, and check the check-box in front of the name.
- 3) Click Save/Exit and reply “**Yes**” to all the prompts.

Move All documents from the “Old Tab Name” folder to the “New Tab Name” Folder

From the Documents folder on any patient.

- 1) Use the top toolbar “**Tools**” option then “**Move Folder Contents for All Patients**”
- 2) Use the From Folder Drop Down Arrow and select the “**Old Folder Name**”.
- 3) Use the To Folder Drop Down Arrow and select the “**New Folder Name**”.
- 4) Click Run and enter the special password, then follow on-screen prompts.
- 5) When completed it will return to the Primary Menu.

Clear the “Old Tab Name”

From the Documents folder on any patient.

- 1) Use the top toolbar “**Tools**” option then “**Tab Heading Definitions**”, enter the special password.
- 2) Clear out the “**Old Tab Name**” and remove the check mark in front of it.
- 3) Click Save/Exit and reply “**Yes**” to all the prompts.

Note: the first 7 Folder Tab Descriptions cannot be cleared, but they can be un-checked so that they don’t show up.