Document Categories

In this guide, you will learn how to create the categories in Practice Settings. Before EMA® users can associate uploaded attachments to the correct category, the practice's firm administrator must first create those Document Categories in the Practice Settings.

Understand Document Categories

Creating document categories allows the clinical staff to properly categorize documents uploaded into EMA. Some common attachment types include, but are not limited to: *Blood Work*, *External Visit Note*, *Path Report*, and *Referral*.

Document Categories will display as a **Category** in EMA once created. Properly categorizing documents expedites the search for documents.
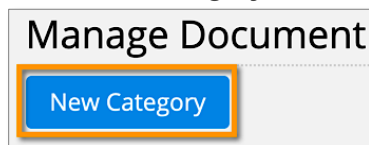
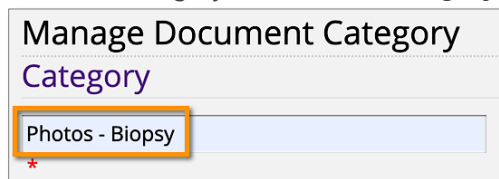| Title	Category	File
☐ Wed 11/06/20	Blood Work	ipad_phm_MRNEMA7
☐ Wed 11/06/20	Blood Work	ipad_phm_MRNEMA7

Create a New Document Category

1. Log into the Practice Settings using the firm administrator's credentials.
2. In the **Categories and Tags** section, select **Manage Document Categories**.
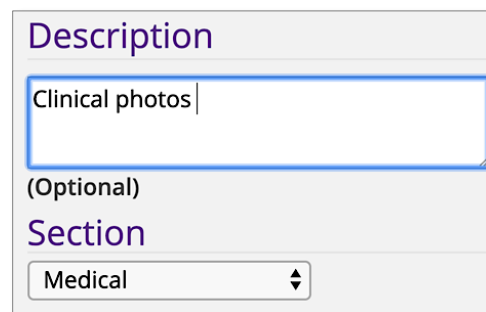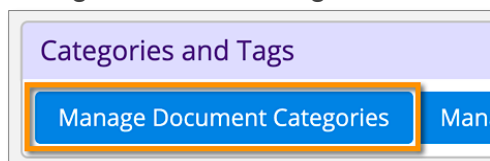

3. Select **New Category**.

4. Enter the Category name in the **Category** field.

Note: This is the category name that will display in the category drop-down menu in EMA.

5. Enter a **Description** to help the firm administrator determine differences between various Document Categories.
6. Select a **Section** the Document Category that may be further associated with from the drop-down selections.
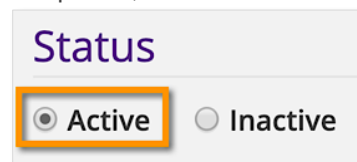

Note: This information entered in Description and Status will only display in Practice Settings and is for reference only.

7. Select the appropriate **Status**. When completed, select *Save*.

- **Active** will display the category in EMA.
- **Inactive** will hide the category.

Modify an Existing Document Category

This section distinguishes what Document Categories can be modified or changed from Active to Inactive.

Check the *Status* column:

- **Always Active:** Means this column was automatically defaulted by EMA and can't be modified.

Section	Status	Actions
Test Results	Always Active	Modify
Medical	Always Active	Modify
Medical	Always Active	Modify

- **Active:** Means the column was automatically default by EMA but the **Status** can be changed from Active to Inactive or vice versa.

Section	Status	Actions
Medical	Active	Modify
Practice	Active	Modify
Medical	Active	Modify

- **Modify:** If a practice created a *Document Category*, the category's content can be changed from Active to Inactive.

Status	Actions
Active	Modify