

How to Bulk Lock Clinical Notes

07/24/2024 4:45 pm EDT

DrChrono has implemented a feature to save you time by allowing clinical notes to be locked in bulk, instead of individually.

If you would like this feature turned on, please reach out to your account manager or [support](#).

1. Hover the cursor over the **Clinical** tab and click on **Clinical Notes**.

Clinical Patients Reports

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

CLINICAL

- Clinical Notes**
- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

2. Once on the screen, please make necessary selections based on date range, provider, and more.

Schedule Clinical Patients Reports Billing Account Marketplace Help X Search

SOAP Notes Clinical Report

Offices [Edit Selection](#)
Office 1, Office 2, Office 3, Office 4

Doctors [Edit Selection](#)
Dr. James Smith

Supervisors [Edit Selection](#)
None

Locked Status Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled **View Last:** Day Week Month Year

Patient's Name User's Name Contains Text 01/01/2024 06/24/2024 [Refresh](#)

[Export Report To Excel](#) [Print non-blank Clinical Notes in Report](#) [Bulk Lock Non-Blank Notes](#) PAGE 1 OF 1

Patient	Date	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off
Test Patient Jr	03/01/2024 01:30 PM	Dr. James Smith	None	No	Not Needed Edit (1701)
Laurie Sample	03/01/2024 09:30 AM	Dr. James Smith	None	No	Not Needed Edit (158)
Laurie Sample	02/28/2024 01:00 PM	Dr. James Smith	None	No	Not Needed Edit (157)
Laurie T. Sample	02/13/2024 12:30 PM	Dr. James Smith	None	No	Not Needed Edit (7195)
Sample Testguy	01/19/2024 08:30 AM	Dr. James Smith	None	No	Not Needed Edit (153)
Laurie T. Sample	01/18/2024 03:30 PM	Dr. James Smith	None	No	Not Needed Edit (7185)

3. Once the desired selections have been made, please click the **Bulk Lock Notes** button (blank progress notes/ notes that are labeled "start note", will be excluded).

Schedule Clinical Patients Reports Billing Account Marketplace Help X Search

SOAP Notes Clinical Report

Offices [Edit Selection](#)
Office 1, Office 2, Office 3, Office 4

Doctors [Edit Selection](#)
Dr. James Smith

Supervisors [Edit Selection](#)
None

Locked Status Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled **View Last:** Day Week Month Year

Patient's Name User's Name Contains Text 01/01/2024 06/24/2024 [Refresh](#)

Export Report To Excel Print non-blank Clinical Notes in Report **Bulk Lock Non-Blank Notes** [PAGE 1 OF 1](#)

Patient	Date	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off	
Test Patient Jr	03/01/2024 01:30 PM	Dr. James Smith	None	No	Not Needed	Edit (1701)
Laurie Sample	03/01/2024 09:30 AM	Dr. James Smith	None	No	Not Needed	Edit (158)
Laurie Sample	02/28/2024 01:00 PM	Dr. James Smith	None	No	Not Needed	Edit (157)
Laurie T. Sample	02/13/2024 12:30 PM	Dr. James Smith	None	No	Not Needed	Edit (7195)
Sample Testguy	01/19/2024 08:30 AM	Dr. James Smith	None	No	Not Needed	Edit (153)
Laurie T. Sample	01/18/2024 03:30 PM	Dr. James Smith	None	No	Not Needed	Edit (7185)

4. Please select which notes, or select all and click the **Lock** button. (Note: Please be aware this process takes a few minutes to complete).

Bulk Lock Non-Blank Clinical Notes

<input checked="" type="checkbox"/> Lock?	Patient	Date	Provider	Locked (Rendering Signed)
<input checked="" type="checkbox"/>	Laurie T. Sample	01/18/2024 03:30 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Sample Testguy	01/19/2024 08:30 AM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie T. Sample	02/13/2024 12:30 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie Sample	02/28/2024 01:00 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie Sample	03/01/2024 09:30 AM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Test Patient Jr	03/01/2024 01:30 PM	Dr. James Smith	No

[Close](#) [Lock](#)

Note: The list of clinical notes for bulking locking is limited to 50 entries. If your total notes for locking are greater than 50 be sure to use steps 3 and 4 on the remaining pages of the unlocked clinical notes.

A confirmation window will appear prompting you to click **OK**.