

How do I unlock a clinical note?

07/24/2024 4:25 pm EDT

A clinical note can be unlocked by following the below steps.

1. Navigate to **Clinical > Clinical Notes**.

Clinical Patients Reports

FORM TOOLS

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

CLINICAL

Clinical Notes

- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

Note: You can also open a clinical note through the appointment window or the appointments section of a patient's chart.

2. Adjust applicable filters as needed and select the note you would like to unlock. A locked note's status will appear as View Note.

SOAP Notes Clinical Report

Offices: Primary Office, Telehealth

Doctors: James Smith

Locked Status: Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled

View Last: Day | Week | Month | Year

Export Report To Excel | Print non-blank Clinical Notes in Report | Bulk Lock Notes

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
Peter Django	06/16/2021 01:00 PM	James Smith	Signed by James Smith	Signed by James Smith	View Note
Jenny (Jen) Harris	06/16/2021 08:30 AM	James Smith	No	Not Needed	Edit (3683)
Alexis Wu	06/15/2021 10:30 AM	James Smith	No	Not Needed	Start Note

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View Note

3. Click the **Unlock** button. If the note is not locked yet, it will read **Sign & Lock**.

+ Amendments Revisions View Fax Unlock Send to Onpatient Print sections


- H&P
 - SOAP
 - ADDITIONAL
 - APPS
- View Locked Note
- onpatient / Check-in
 - Subjective
 - Objective
 - Assessment
 - Plan
 - Medications & Allergies
 - Billing

Status: Locked by Rendering Provider

+ Amendments Revisions View Fax Unlock Send to Onpatient Print sections

To change note format, click on Clinical > Complete Note Format.

lock 1 / 1 100%



Dr. Nick's Walk-In Clinic
Patient: Jenny (Jen) Harris DOB: 02/11/1980 Sex: F
Provider: James Smith Visit: 06/16/2021 8:30AM Chart: HAJE000001
Office: Telehealth Address: 229 Schilling Circle, Hunt Valley, MD, 21031

Medications & Allergies:

Current Medication & Dosage	Dispense	SIG	PRN?	Indication
Mirena 52 mg intrauterine device	0	0	No	
Flonase 50 mcg/inch nasal spray	0	0	No	
Cranberry oral capsule	0	0	No	
12 Hour Nasal	20,000		No	

4. A window will open with a message. To continue, click **Unlock**.