

How do I lock a clinical note?

07/24/2024 4:10 pm EDT

With DrChrono you can electronically sign a note when the note is locked. Clinical notes are rendered in PDF format. There are several ways to navigate to the clinical note in order to sign and lock the document.

The most common ways to get to the clinical note are:

1. Open the appointment and click **View Clinical Note**.

Schedule Appointment

Appointment | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type Appointment Video Visit Walk-in Transition of Care Referral

WARNING: This patient is pre-populated sample data. 1 past appointments

Provider: James Smith
Patient: Peter Django - 12/21/1993
Reason:
Scheduled: 10/19/2020 Time 09:00AM
Duration: 30 minutes Allow overlapping
Notes:
Consent Forms:

Billing: - If different to provider -
Office: Primary Office
Profile: -----
Exam: Exam 1
Color:
Status:
0h 3m

View Clinical Note (highlighted with arrow)
View All Appointments

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
 Arrange a Follow-up Reminder
 View Active Reminders:
Choose a Reminder Profile:

2. From the patient's chart, go to **Appointments** and click **Edit Note**.

Schedule Clinical Patients Reports Billing Account Help

+ Add new patient

Appointments (highlighted with arrow)

Peter Django (Male | 26 years old | Dec. 21, 1993)

Phone: (844) 569-8628 Email: Missing Date Added: Aug. 13, 2020
Address: 1000 W Maude Ave Last Scheduled Appt: Mon Oct 19, 2020
Sunnyvale, CA 94085 Next Scheduled Appt:
CDS: Adult Immunization Schedule Age: 22-26

New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

Future Appointments Print Future Appointments

Scheduled Time	Provider	Billing Provider	Reason	Notes	Office	Exam Room	Address	Appointment Status	Billing Status	Profile	Actions
No Future Appointment											

Past Appointments Print History

Scheduled Time	Provider	Billing Provider	Reason	Notes	Office	Exam Room	Appointment Status	Billing Status	# Reminders	Profile	Actions
Mon Oct 19, 2020 9:00a.m.	James Smith	None			Primary Office	Exam 1			0		Edit Note (highlighted with arrow)

3. Go to **Clinical > Clinical Notes** and select **Start Note** or **Edit Note** for the note you need to complete and lock.

Schedule Clinical Patients Reports Billing Account Help

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

MU REPORTING
 Meaningful Use 2014
 Meaningful Use 2015 (Final Revision)
 MIPS/MACRA
 Clinical Quality Measure

Rendering Exclude Cancelled, No-Show, and Rescheduled

View Last: Day Week Month Year

Contains Text 10/12/2020 10/19/2020 Refresh

Notes in Report Bulk Lock Notes

PAGE 1 OF 1

Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
James Smith	No	Not Needed	Start Note
James Smith	No	Not Needed	Edit (8463)
James Smith	No	Not Needed	Cancelled

Once you have arrived at the clinical note and are ready to sign click **Preview Note**.

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

Preview Note

onpatient / Check-In
 Subjective
 Objective
 Assessment
 Plan
 Medications & Allergies
 Billing

Jenny (Jen) Harris (Female | 40 years | 02/11/1980 | HAJE000001) James Smith | 10/15/2020

Back Pain

Primary Insurer: (62308) Cigna

Growthcharts Vitals Print section Fax section

Include in Note "Add to note" must be checked for this to render.

HPI
 Jenny (Jen) Harris is a 40 year year old female presenting with back pain.

Social HX
 non-contributory

Family HX
 None

Past Medical HX
 na

In the note preview screen, the signature will be listed as **Pending** at the bottom of the note until it is signed and locked. When you are ready to sign and lock the note click **Sign & Lock**.

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

Preview Note

onpatient / Check-In
 Subjective
 Objective
 Assessment
 Plan
 Medications & Allergies
 Billing

Status: Not Locked

Amendments Revisions View Fax Sign & lock Edit Sections Print sections

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

no tremors or other involuntary movements ENDOCRINE: no heat or cold intolerance, no excessive sweating, no excessive thirst or hunger, no polyuria, no change in glove or shoe size PSYCHIATRIC: no nervousness, no depression, no memory change

GENERAL: AAOx3, NAD, normal level of consciousness, good personal hygiene

HEENT: no gross deformity, sclerae anicteric, EOM, normal conjunctivae, PERRLA, no sinus tenderness, no boggy nasal mucosa, no erythema of throat, no exudate of throat, no lesions of throat, no enlargement of tonsils, TM clear

SKIN: no lesions, no rash

NECK:
 Supple. No lymphadenopathy/tenderness (-) thyromegaly

CARDIOVASCULAR: RRR, no JVP, no carotid bruits, no murmurs, rubs or gallops, S1 S2 present, no S3, no S4 LUNGS: CTAB, no adventitious sounds ABDOMEN: soft, non-tender, non-distended, no surgical scars, no trauma on inspection, normal bowel sounds all 4 quadrants, no masses noted on light or deep palpation, no CVA tenderness, no hepatosplenomegaly, no rebound tenderness

Assessment:

Type	Code
ICD-10-CM Condition	M50

Medications & Allergies

Pending e-signature
 was generated at 10/19/2020 9:17AM

[Page 1] Powered by drchron

After the note is signed and locked, the e-signature of the rendering provider will appear with a time and date

stamp reflecting when the note was signed and locked.

E-signed by James Smith on 10/19/2020 9:25AM EDT
This page was generated at 10/19/2020 9:25AM EDT

The screenshot shows a medical software interface with a sidebar on the left containing a 'View Locked Note' button and a list of note sections: 'onpatient / Check-In', 'Subjective', 'Objective', 'Assessment', 'Plan', 'Medications & Allergies', and 'Billing'. The main content area displays a table of medications and a plan section. At the bottom of the note content, there is a timestamp: 'E-signed by James Smith on 10/19/2020 9:25AM EDT' and 'This page was generated at 10/19/2020 9:25AM EDT'. A callout box above this text points to it with an arrow.

Type	Code	Modifiers	Quantity	Description
OP1	1132F		1.00 UN	EPSD BK PAIN FOR >6 WKS

[Page 2] E-signed by James Smith on 10/19/2020 9:25AM EDT Powered by drchrono
This page was generated at 10/19/2020 9:25AM EDT

The note status bar will reflect: Locked by Rendering Provider, along with the option to unlock the clinical note.

Status: Locked by Rendering Provider + Amendments Revisions View Fax **Unlock** Send to Onpatient Print sections

All patient data listed in this article is sample data. This is not a real person or real patient data.