

Why do I have to lock clinical notes when I archive/delete a field or form?

07/24/2024 11:07 pm EDT

You may have noticed when trying to delete a whole form or field from the form, you see a notice that you need to lock certain clinical notes before deleting the fields or form.

Form Builder

Form Builder

Legend:

Form List +

Presets Additional

- Consent for Injection
- Work/School Excuse Form
- Eye Exam
- Sample Form
- Billing Codes to Forms Sample
- Trigger Point Injection Form
- Lumbar Facet Joint Injections**
- CERVICAL SPINE ASSESSMENT
- Consent Practice Demo
- Consent Free Draw 2
- Physical Exam Multiple Select

Share

Lumbar Facet Joint Injections

Chief Complaint Lumbar Physical Exam

injection in the current series Relief from previous injection

Complications YES NO Complication comments

Procedure Dx, Therapeutic or both

Bilat FJI L3-4,L4-5,L5-S1

Side First Level

Similar proc was performed on levels

When you click on the X to remove the form or field, you will see a message with a list of the unlocked clinical note(s). If the notes are not signed and locked, you will not be able to archive the form or field until they are locked. The reason for this is to preserve the data entered on the form or field while charting so it is not lost.

9 unlocked notes depend on this form

Patient	Visit Date	
Homer J. Simpson	Apr 29, 2019	
Bart Simpson	May 6, 2019	
Auburn Patient	Jun 19, 2019	
Test Patient	Aug 1, 2019	
Marge B. Simpson	Jan 8, 2020	
Peter Parker	Jan 8, 2020	
Homer J. Simpson	Mar 13, 2020	
Test Sample	Jun 10, 2020	
Jenny (Jen) Harris	Nov 13, 2020	

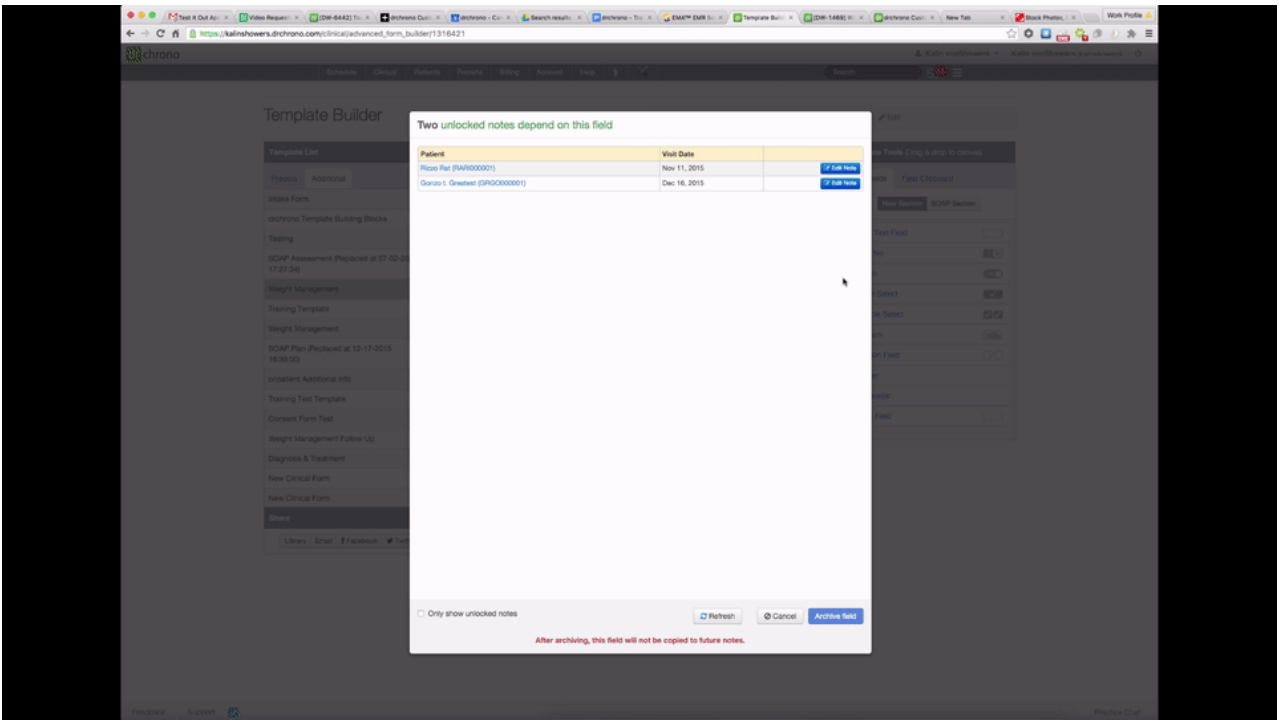
Refresh Cancel Confirm

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Refresh Cancel Confirm

To proceed with archiving the form or field, you will need to lock the notes. You can click on the **Edit Note** button. Once the note is loaded, click **Sign & Lock**.



Note: If you delete an option within a field, like a single or multiple select, you will not see a warning. For example, **bilateral** has already been selected from the multiple select field. If we remove 'bilateral' from the field, it will still appear on the note until you navigate back to the form and click preview note again. However, If you add the option back, you can select it again in the note. As a best practice, we recommend signing and locking notes regularly to best preserve the data of the note.

