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.

Legend: 🖋

Form Builder

Form List	+	Lumbar Fac	Lumbar Facet Joint Injections 🕜			
Presets Additional		Chief Complaint	Lumbar Physical Exam			
Consent for Injection	×					
Work/School Excuse Form		# injection in the current series	Relief from previous injection			
Eye Exam 🗙		Single Select	Single Select			
Sample Form	×	Complications	Complication comments			
Billing Codes to Forms Sample	×					
Trigger Point Injection Form	×	Procedure Dx, Therapeutic or both A Single Select	×			
Lumbar Facet Joint Injections	×	Bilat FJI L3-4,L4-5,L5-S1				
CERVICAL SPINE ASSESSMENT	×	ON				
Consent Practice Demo	×	Side	First Level			
Consent Free Draw 2	×	Single Select	Single Select • 🗘			
Physical Exam Multiple Select	~	Similar proc was performed on levels				
Share		Multiple Select				

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.

Patient	Visit Date		Patient	Visit Date	
Homer J. Simpson	Apr 29, 2019	12º Edit Note	Homer J. Simpson	Apr 29, 2019	C/ Edit Not
Bart Simpson	May 6, 2019	C Edit Note	Bart Simpson	May 6, 2019	C' Edit Not
Auburn Patient	Jun 19, 2019	2 Edit Note	Auburn Patient	Jun 19, 2019	Cf Edit Not
Test Patient	Aug 1, 2019	C Edit Note	Test Patient	Aug 1, 2019	Gf Edit Not
Marge B. Simpson	Jan 8, 2020	12º Edit Note	Marge B. Simpson	Jan 8, 2020	C/ Edit Not
Peter Parker	Jan 8, 2020	2 Edit Note	Peter Parker	Jan 8, 2020	C' Edit Not
Homer J. Simpson	Mar 13, 2020	2 Edit Note	Homer J. Simpson	Mar 13, 2020	Gf Edit Not
Test Sample	Jun 10, 2020	2 Edit Note	Test Sample	Jun 10, 2020	Cf Edit Not
Jenny (Jen) Harris	Nov 13, 2020	C# Edit Note	Jenny (Jen) Harris	Nov 13, 2020	G? Edit Not

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**.

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()))) chi						Kalin vonShowers platestowers	
		Two unlocked notes depend on this field			2.5at		
		Patient	Visit Date		ite Tools (Drug & drop to carves)		
		Rizzo Ret (NAR000001)	Nov 11, 2015	Of Bulk Hole	ota Dat Cistand		
		Gorzo I. Greatest (3RGC000001)	Dec 16, 2015	OF BUE NOM			
					New Section SDAP Section		
					Text Field		
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						10	
						100	
					on Read	10	
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					nater		
					Raid C		
	Lbrary Ernel #Facebook #Twit						
		 Only show unlocked notes 	C Refresh	@ Cancel Archive field			
		After archiving, this field a	Il not be copied to future notes.				
		and a stating the local					
Feedba						Precise Chat	

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.

Edit Field *	H&P SOAP ADDITIONAL APPS	
	Preview Note	Homer J. Simpson (Male 64 years 05/13/1956 SIHO000001)
Label Name Location Try to keep it short!	onpatient / Check-In	Chief Complaint
Allowed Value fateral	CC / History of Present Illness	Primary Insurer: (87726) Pacificare ofTexas Secondary Insurer: (60054) Aetna
Move	Med / Fam / Social History	
bilateral	Medications & Allergies	Laat
	Review of Systems	
+ Add option	Prijest Exam	n Note
Spacing with ☑ New Line □ New Pg	Assessment	Location Comments
	Plan	
Edit © Date & Time 🛱 Field Date @ Field Date & Time	Billing bilateral >	
Preview Header Submearer Bold Italic Underline x ₂ x ² Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr		Quality Comments
{patient}} describes the location to be {{value}}	of at least one o	ption
{(patient)} describes the location to be {(value)}		
· · · · · · · · · · · · · · · · · · ·		
Billing Profile (None) -		
Clinical codes Code System Code Description Option		
Cancel ✓ No changes		