

# How do I generate a report showing all of my locked notes?

07/24/2024 4:05 pm EDT

You can run a report that lets you view all of your notes' lock status.

1. Hover over the **Reports** tab and click **Advanced Report**.



2. Be sure the **Appointments** tab is selected and apply any filters. Click **Export to File** and select **Custom Export**.

## Advanced Report

The screenshot shows the 'Advanced Report' interface. At the top, there are tabs for 'Appointments' and 'Patients'. Below the tabs, there are several filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. A message indicates 'No filters selected'. Below the filters, there are options to 'Filter by patient only', 'Archived exam rooms', 'Include', 'Breaks', 'Excluded', 'Show 50 per page', 'Update Filter', and 'Save Filter'. At the bottom, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File'. The 'Export to File' button is highlighted, and a dropdown menu is open showing 'Quick Export' and 'Custom Export'. Below the menu, there is a table with columns: 'Date of Service', 'Patient', 'Office', 'Examroom', 'Appt Status', 'Billing Status', 'Insurance Status', and 'Lock Status'. The table contains two rows of data.

Date of Service	Patient	Office	Examroom	Appt Status	Billing Status	Insurance Status	Lock Status
Sep 7, 2022 8:00:00 AM	Laurie Sample	Dr. James Smith	Office 1	Exam 1	Checked In Online	Not Submitted	Unlocked
Sep 1, 2022 8:00:00 AM	Laurie Sample	Dr. James Smith	Office 1	Exam 1	Checked In Online	Ready To Bill	Locked

3. Click the **Clinical Note** tab and select **Lock Status** then **Export**. You can also name the file if you would like in the **Report Name** field.


## Custom Export



Report Name

[Patient \(4\)](#) [Appointment](#) [Clinical Note](#) [Doctor](#)

Lock Status  Locked Time  Supervisor Locked Time

4. This will send a file to your message center () accessed from the top right of your screen, containing the report.

### Incoming Messages ?

<input type="button" value="Mark as Read"/>	<input type="button" value="Mark as Unread"/>	<input type="button" value="Show Archived"/>	<input type="button" value="NEXT &gt;"/>	<input type="text" value="Search Messages"/>	<input type="button" value="Q"/>			
<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	 drchrono	Generated Sheet: Note Status Report.zip					June 28, 2021, 12:21 p.m.	June 28, 2021, 12:21 p.m.