

Archive and Restore a Form

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Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) to help users maximize the utilization of the clinical notes feature.

DrChrono has created an easier way to archive, and locate archived and unarchive forms with just a few clicks. See how below:

There are (2) ways to archive a form via Clinical Form Management.

From the form list


1. Navigate to Clinical > Clinical Form Management
2. Locate the form from the list (on the left)
3. Click the 'archive form' icon under the Action column
4. Click Archive Form

Name 	Form Setting	Last Modified 	Action
Acupuncture SOAP Follow-Up		03/15/2021	  
Acupuncture SOAP New Patient		03/15/2021	

From the edit option

1. Navigate to Clinical > Clinical Form Management
2. Locate the form from the list (on the left)
3. Click the pencil icon to edit the form (on the right)
4. Click the gear icon located beside the name of the form
5. Click archive form

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Acupuncture SOAP Follow-Up 

4. Please rate the following on a scale of 0-10 with 0 being NONE and 10 being the WORST

This is only a test

TTest

Text Field

Subjective

History of Present Illness


Text Field

Make Form Persistent


Hide Form Name Header

Set as Default Form


Exclude from Complete Note




Edit Form Info




Duplicate Form



Set as Workflow Form >



Clear Form



Archive Form

How to Restore Archived Forms

1. Navigate to the Archive Section

Go to the top menu and select **Clinical > Archive (beta)**.

2. Locate the Desired Form

In the list, find the archived form you want to restore.

3. Use the Action Column

Click the **Unarchive** option in the Action column next to the form.

4. Search Unlocked Notes (Optional)

You can also search for any unlocked notes linked to the archived form in this section.

5. Confirm Restoration

A pop-up message will appear confirming that the form has been successfully restored.

How to Search for Unlocked Notes Associated with an Archived Form

Form Archive

Form Name	Action
In Home Visit (Covid-19)	Search Unlocked Notes Unarchive
Initial Consultation	Search Unlocked Notes Unarchive

1. Navigate to the Archive Section:

- Go to **Clinical > Archive (Beta)** in the top menu bar.

2. Locate the Form:

- Use the pagination arrows at the bottom right corner to browse through the list and find the desired form.

3. Search for Unlocked Notes:

- Once you find the form, click on **“Search Unlocked Notes”** located under the **Action** column for that form.
- System Message:**

- The system will display a message:
"Searching for unlocked notes that depend on this form."

4. View Results:

- If **no unlocked notes** are associated with the form, a message will appear:
"No unlocked notes depend on this form."
- If there **are unlocked notes** associated, a box will display listing the unlocked note(s) with a hyperlink to access the note.

5. Access and Lock Notes:

- Click the hyperlink to **view** the unlocked note.
 - From the note view, you can choose to **lock** the note as needed.
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