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.

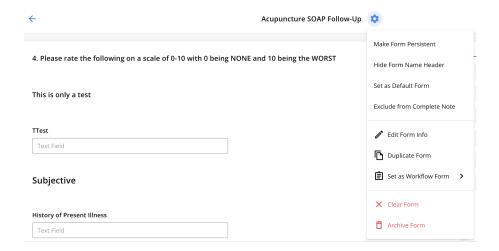
From the form list

- 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



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



How to Restore Archived Forms

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



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.