

# How to Bulk Lock Clinical Notes

Last modified on 09/19/2024 1:08 pm EDT

DrChrono has implemented a feature to save you time by allowing clinical notes to be locked in bulk, instead of individually.

If you would like this feature turned on, please reach out to your account manager or [support](#).

1. Hover the cursor over the **Clinical** tab and click on **Clinical Notes**.

**Clinical** Patients Reports

**FORM TOOLS**

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**CLINICAL**

- Clinical Notes**
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2. Once on the screen, please make necessary selections based on date range, provider, and more.

**SOAP Notes Clinical Report**

**Offices** [Edit Selection](#)

Offsite, Primary Office, Refills, Telehealth

**Doctors** [Edit Selection](#)

Donna John, K Parker, MD, Krystal Parker

**Locked Status**  Need supervising  Need rendering  Exclude Cancelled, No-Show, and Rescheduled **View Last:** Day Week Month Year

Patient's Name  User's Name  Contains Text  09/12/2024 09/19/2024 [Refresh](#)

Export Report To Excel Print non-blank Clinical Notes in Report **Bulk Lock Non-Blank Notes** PAGE 1 OF 1

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
drchono Test	09/19/2024 03:00 PM	K Parker, MD	No	Not Needed	<a href="#">Start Note</a>
drchono Test	09/16/2024 03:00 PM	K Parker, MD	No	Not Needed	<a href="#">Start Note</a>
drchono Test	09/15/2024 03:00 PM	K Parker, MD	No	Not Needed	<a href="#">Start Note</a>
drchono Test	09/12/2024 03:00 PM	K Parker, MD	No	Not Needed	<a href="#">Start Note</a>

3. Once the desired selections have been made, please click the **Bulk Lock Non-Blank Notes** button (blank progress notes/ notes that are labeled "start note", will be excluded).

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### SOAP Notes Clinical Report

**Offices** [Edit Selection](#)  
Office 1, Office 2, Office 3, Office 4

**Doctors** [Edit Selection](#)  
Dr. James Smith

**Supervisors** [Edit Selection](#)  
None

**Locked Status**  Need supervising  Need rendering  Exclude Cancelled, No-Show, and Rescheduled **View Last:** Day Week Month Year

Patient's Name User's Name Contains Text 01/01/2024 06/24/2024 [Refresh](#)

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Patient	Date	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off	
Test Patient Jr	03/01/2024 01:30 PM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (1701)</a>
Laurie Sample	03/01/2024 09:30 AM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (158)</a>
Laurie Sample	02/28/2024 01:00 PM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (157)</a>
Laurie T. Sample	02/13/2024 12:30 PM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (7195)</a>
Sample Testguy	01/19/2024 08:30 AM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (153)</a>
Laurie T. Sample	01/18/2024 03:30 PM	Dr. James Smith	None	No	Not Needed	<a href="#">Edit (7185)</a>

4. Please select which notes, or select all and click the **Lock** button. (Note: Please be aware this process takes a few minutes to complete).

### Bulk Lock Non-Blank Clinical Notes

<input checked="" type="checkbox"/> Lock?	Patient	Date	Provider	Locked (Rendering Signed)
<input checked="" type="checkbox"/>	Laurie T. Sample	01/18/2024 03:30 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Sample Testguy	01/19/2024 08:30 AM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie T. Sample	02/13/2024 12:30 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie Sample	02/28/2024 01:00 PM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Laurie Sample	03/01/2024 09:30 AM	Dr. James Smith	No
<input checked="" type="checkbox"/>	Test Patient Jr	03/01/2024 01:30 PM	Dr. James Smith	No

[Close](#) [Lock](#)

**Note:** The list of clinical notes for bulking locking is limited to 50 entries. If your total notes for locking are greater than 50 be sure to use steps 3 and 4 on the remaining pages of the unlocked clinical notes.

A confirmation window will appear prompting you to click **OK**.