How to Bulk Lock Clinical Notes

Last modified on 03/24/2025 2:09 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 support.

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



Patient Education Management

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

SOAP Notes Clinical Report									
Offices									
Offsite, Primary Office, Refills, Telehealth									
Doctors									
Donna John, K Parker, MD, Krystal Parker									
Locked Status Need supervising Need rendering Day Week Month									
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					
drchrono Test	09/19/2024 03:00 PM	K Parker, MD	No	Not Needed	Start Note				
drchrono Test	09/16/2024 03:00 PM	K Parker, MD	No	Not Needed	Start Note				
drchrono Test	09/15/2024 03:00 PM	K Parker, MD	No	Not Needed	Start Note				
drchrono Test	09/12/2024 03:00 PM	K Parker, MD	No	Not Needed	Start Note				

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).

Schedule	Clinical Patients	Reports Billing	Account I	Marketplace	Help X						Search		
SOAP Notes Clinical Report													
Offices													Edit Selection
Office 1, Office 2, Office 3, Office 4													
Doctors													Edit Selection
Dr. James S	Smith												
Supervisors	3												Edit Selection
None													
Locked Status Need supervising Need rendering								Month Year					
Patient's Name User's Name Contains Text 01/01/2024 06/24/2024 Refresh													
Export Repo	rt To Excel Print no	m-blank Clinical Notes in	n Report Bu	ulk Lock Non-Bl	ank Notes								PAGE 1 OF 1
Patient	Date) ‡	Re	endering Provide	ar 🛛	Supervising Provider	L	ocked (Rendering Signed)		Supervising Signed C	Dff		
Test Patient Jr	03/0	1/2024 01:30 PM	Dr.	James Smith		None	N	o		Not Needed		Edit (17	701)
Laurie Sample	03/0	1/2024 09:30 AM	Dr.	James Smith		None	N	o		Not Needed		Edit (15	58)
Laurie Sample	02/2	8/2024 01:00 PM	Dr.	James Smith		None	N	0		Not Needed		Edit (15	57)
Laurie T. Samp	le 02/1	3/2024 12:30 PM	Dr.	James Smith		None	N	0		Not Needed		Edit (71	195)
Sample Testgu	y 01/1	9/2024 08:30 AM	Dr.	James Smith		None	N	0		Not Needed		Edit (15	i3)
Laurie T. Samp	le 01/1	8/2024 03:30 PM	Dr.	James Smith		None	N	0		Not Needed		Edit (71	185)

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

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

Close

Lock

X

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.