

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

07/08/2024 7:36 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**.



The screenshot shows a navigation menu with three tabs: 'Reports', 'Billing', and 'Account'. The 'Reports' tab is active and highlighted in yellow. Below the tabs, a list of report categories is shown under the heading 'PRACTICE REPORTS'. The 'Advanced Report' option is highlighted with a blue background.

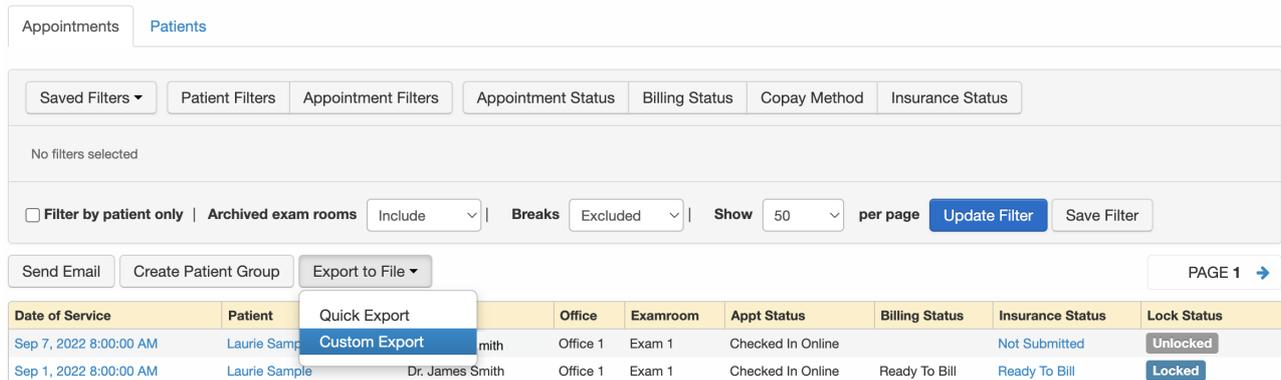
- Reports
- Billing
- Account

PRACTICE REPORTS

- Account / User Report
- Productivity Report
- Reminder Report
- Outgoing Prescriptions
- Patient Insurance Authorization
- Appointment Report
- Telehealth Report
- Patient Report
- Communication Log Report
- Medication Report
- Problem Report
- Allergy Report
- Labs Report
- 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. The 'Appointments' tab is selected. The 'Export to File' dropdown menu is open, showing 'Quick Export' and 'Custom Export' options. The 'Custom Export' option is selected. Below the menu, a table of appointment data is visible.

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

No filters selected

Filter by patient only | Archived exam rooms Include | Breaks Excluded | Show 50 per page Update Filter Save Filter

Send Email Create Patient Group Export to File PAGE 1

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="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.