

Why do I have to lock clinical notes when I archive/delete a field or form?

07/08/2024 7:58 pm EDT

You may have noticed when trying to delete a whole form or field from the form, you see a notice that you need to lock certain clinical notes before deleting the fields or form.

Form Builder

Legend:

When you click on the X to remove the form or field, you will see a message with a list of the unlocked clinical note(s). If the notes are not signed and locked, you will not be able to archive the form or field until they are locked. The reason for this is to preserve the data entered on the form or field while charting so it is not lost.

9 unlocked notes depend on this form

Patient	Visit Date	
Homer J. Simpson	Apr 29, 2019	Edit Note
Bart Simpson	May 6, 2019	Edit Note
Auburn Patient	Jun 19, 2019	Edit Note
Test Patient	Aug 1, 2019	Edit Note
Marge B. Simpson	Jan 8, 2020	Edit Note
Peter Parker	Jan 8, 2020	Edit Note
Homer J. Simpson	Mar 13, 2020	Edit Note
Test Sample	Jun 10, 2020	Edit Note
Jenny (Jen) Harris	Nov 13, 2020	Edit Note

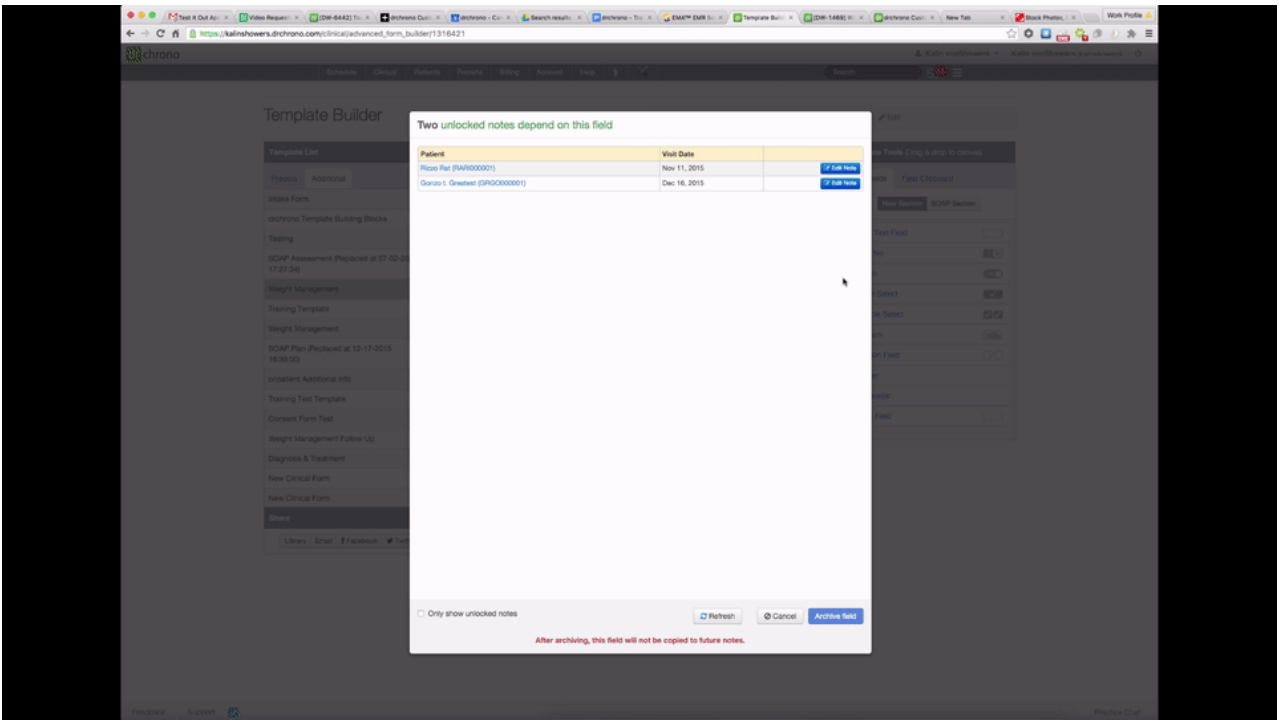
[Refresh](#) [Cancel](#) [Confirm](#)

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[Refresh](#) [Cancel](#) [Confirm](#)

To proceed with archiving the form or field, you will need to lock the notes. You can click on the **Edit Note** button. Once the note is loaded, click **Sign & Lock**.



Note: If you delete an option within a field, like a single or multiple select, you will not see a warning. For example, **bilateral** has already been selected from the multiple select field. If we remove 'bilateral' from the field, it will still appear on the note until you navigate back to the form and click preview note again. However, If you add the option back, you can select it again in the note. As a best practice, we recommend signing and locking notes regularly to best preserve the data of the note.

