

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

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Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to Clinical Form Management. For more details and answers to common questions, please refer to our [FAQ article](#).

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

The screenshot shows the Form Builder interface. On the left, the 'Form List' sidebar is visible with various form names and a delete icon. The 'Lumbar Facet Joint Injections' form is selected. On the right, the form details are shown, including fields for Chief Complaint, Lumbar Physical Exam, and a 'Procedure Dx, Therapeutic or both' dropdown. A delete icon is located next to the dropdown. Two arrows point to these delete icons.

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.

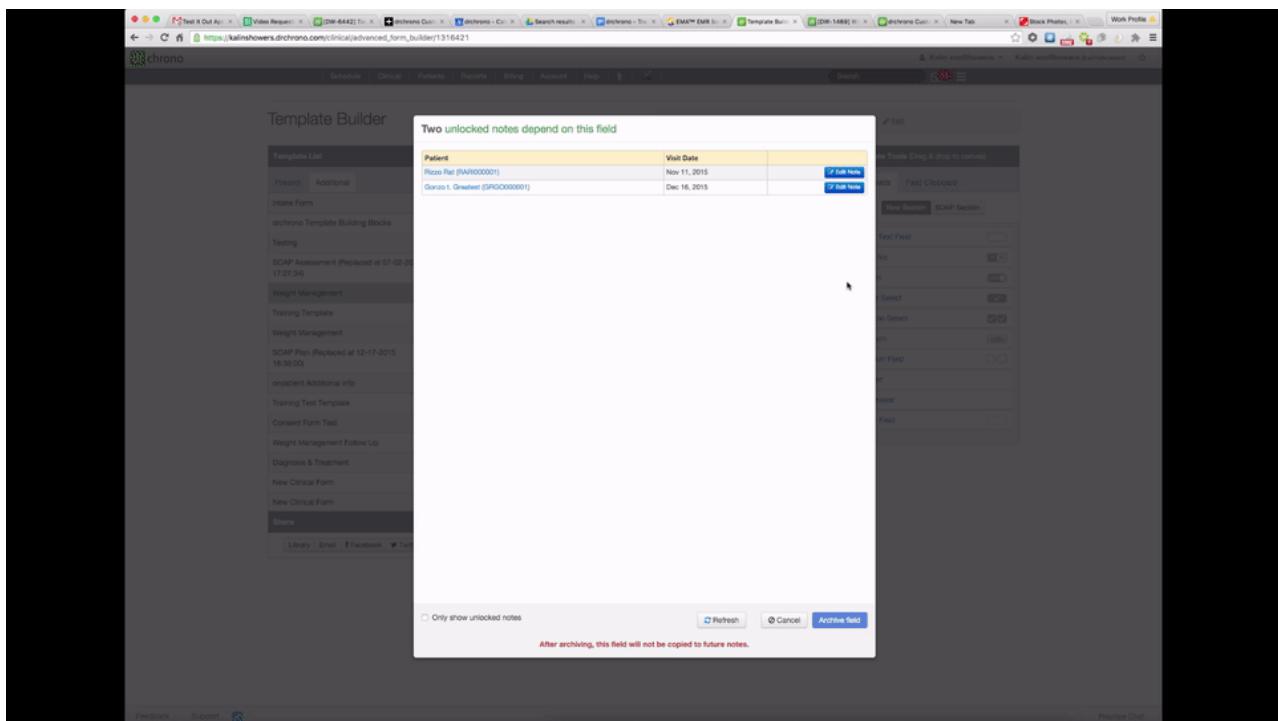
9 unlocked notes depend on this form

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

9 unlocked notes depend on this field

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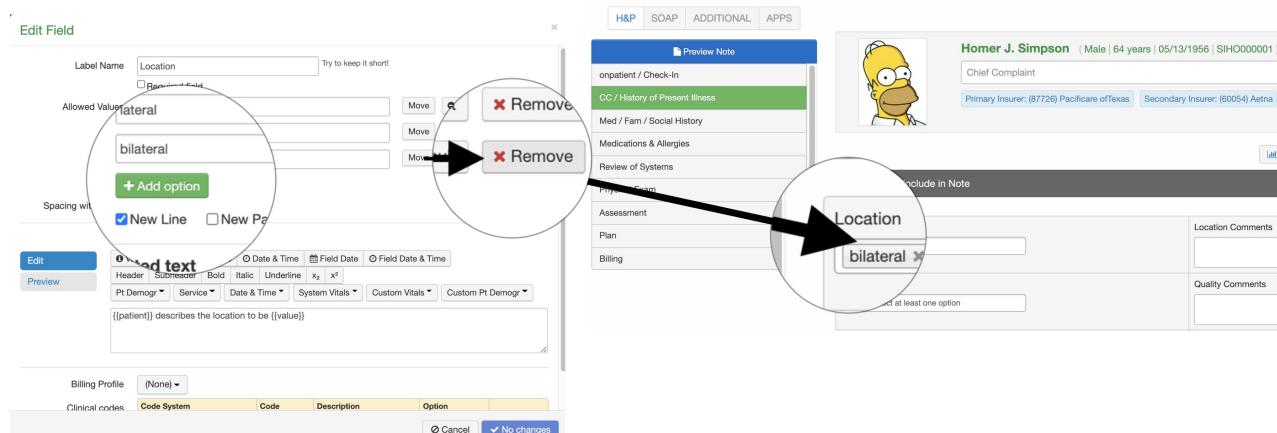
To proceed with archiving the form or field, you will need to lock the notes. You can click on the **Edit Note** button. Once the note is loaded, click **Sign & Lock**.



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.



Learn more about [Best Practices for Building Custom Forms](#) which is designed to help you make the most of the clinical notes feature.