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

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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.

Legend: 🖋

Form Builder

orm List	+	Lumbar Facet Joint Injections 🖉			
Presets Additional		Chief Complaint	Lumbar Physical Exam		
Consent for Injection	×				
Nork/School Excuse Form 🗙		# injection in the current series	Relief from previous injection		
ye Exam 🗙					
ample Form 🗙		Complications	Complication comments		
Billing Codes to Forms Sample	×				
rigger Point Injection Form	×	Procedure Dx, Therapeutic or both	×		
umbar Facet Joint Injections	×	Bilat FJI L3-4.L4-5.L5-S1			
CERVICAL SPINE ASSESSMENT	×	ON			
Consent Practice Demo	×	Side	First Level		
Consent Free Draw 2	×	Single Select	Single Select		
Physical Exam Multiple Select	~	Similar proc was performed on levels			
Share		Multiple Select			

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			9 unlocked notes depend on this field				
Patient	Visit Date			Patient	Visit Date		
Homer J. Simpson	Apr 29, 2019		🕼 Edit Note	Homer J. Simpson	Apr 29, 2019		Gr Edit Note
Bart Simpson	May 6, 2019		I2 Edit Note	Bart Simpson	May 6, 2019		G/ Edit Note
Auburn Patient	Jun 19, 2019		🕼 Edit Note	Auburn Patient	Jun 19, 2019		C Edit Note
Test Patient	Aug 1, 2019		🕼 Edit Note	Test Patient	Aug 1, 2019		C Edit Note
Marge B. Simpson	Jan 8, 2020		C Edit Note	Marge B. Simpson	Jan 8, 2020		C Edit Note
Peter Parker	Jan 8, 2020		🕼 Edit Note	Peter Parker	Jan 8, 2020		G' Edit Note
Homer J. Simpson	Mar 13, 2020		I2 Edit Note	Homer J. Simpson	Mar 13, 2020		G/ Edit Note
Test Sample	Jun 10, 2020		🕼 Edit Note	Test Sample	Jun 10, 2020		C' Edit Note
Jenny (Jen) Harris	Nov 13, 2020		C Edit Note	Jenny (Jen) Harris	Nov 13, 2020		C/ Edit Note
		C Refresh	© Cancel Confirm			C Refresh	O 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**.

● ● ● /M ^t test it Out Apr × (EVale ← → C* ff	e Request × Cite 6442) to × Editorie rs.drchrono.com/clinica/jadvanced_form_b	na Dusi: X \ 🖬 dechesna - Cu: X \ 🛃 Search result: X \ 💽 dechesna - Tu: bullder/1316421	× 🗸 😋 EMANH EMR So ×) 🖾 Tenny	olane Burlis X (Carpon 1468) III X	distribute Cust. × New Tab	x 🖉 Stack Photos, i x 👘 Work Profile 🔺	
20chrono -							
		Two unlocked notes depend on this field			268		
						_	
		Patient Birm Bet (BAR000001)	Visit Date	Extension	te Tools (Frig & drop to cirrvis)		
		Gorato t. Greatest (SRG000001)	Dec 16, 2015	CP Putt Note	olds / and Classes		
					Time Sector BOAP Sector		
					Text Field		
					No. 🔟	0	
						D	
					Screet 📰		
					ne Geleet 🛛 🖾	2	
					en Ini	8	
					en Need OX	D	
					×		
					ader .		
					Pair C	3	
	Library Ernel (Facebook, Willer						
		 Only show unlocked notes 	C Refresh	@ Cancel Archive field			
		After archiving, this field will no	t be copied to future notes.				
Freedoals Support 🚳							

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.

, Edit Field		ж	H&P SOAP ADDITIONAL APPS			
		1	Preview Note		Homer J. Simpson (Male 64 ye	ars 05/13/1956 SIHO000001)
Label N	lame Location Try to keep it short!		onpatient / Check-In		Chief Complaint	
Allowed Vi	Herman	Move & Remove	CC / History of Present Illness		Primary Insurer: (87726) Pacificare ofTexas	Secondary Insurer: (60054) Aetna
lateral			Med / Fam / Social History			
	bilateral	Nove Bemove	Medications & Allergies			lat
		Remove	Review of Systems			
	+ Add option		Priyon From	nclude in M	lote	
Spacing wit	New Line New Pa		Assessment	Location		
			Plan			Location Comments
Edit	O Date & Time M Field Date O Field Da	ate & Time	Billing	bilateral »		
Preview	Header Submeasure Bold Italic Underline x ₂ x ²					Quality Comments
	Pt Demogr * Service * Date & Time * System Vitals * Custom V	Vitals Custom Pt Demogr		ct at least one opti	on	
	{{patient}} describes the location to be {{value}}					
Billing P	rofile (None) -					
Clinical c	Ocles Code System Code Description	Option				
		O Cancel V No changes				

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