

How do I unlock a clinical note?

07/08/2024 8:01 pm EDT

A clinical note can be unlocked by following the below steps.

1. Navigate to **Clinical > Clinical Notes**.

Clinical Patients Reports

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

CLINICAL

Clinical Notes

- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

Note: You can also open a clinical note through the appointment window or the appointments section of a patient's chart.

2. Adjust applicable filters as needed and select the note you would like to unlock. A locked note's status will appear as View Note.

The screenshot shows the 'SOAP Notes Clinical Report' interface. At the top, there are navigation tabs for 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. Below the tabs, there are sections for 'Offices' (Primary Office, Telehealth), 'Doctors' (James Smith), and 'Locked Status' (Need supervising, Need rendering, Exclude Cancelled, No-Show, and Rescheduled). There are also search filters for 'Patient's Name', 'User's Name', and 'Contains Text', along with date ranges (06/14/2021 to 06/21/2021) and a 'Refresh' button. Below the filters, there are buttons for 'Export Report To Excel', 'Print non-blank Clinical Notes in Report', and 'Bulk Lock Notes'. The main content is a table with columns: Patient, Date, Rendering Provider, Locked (Rendering Signed), Supervising Signed Off, and an action column. The table contains three rows of data. An arrow points from the 'View Note' link in the action column of the first row to a highlighted 'View Note' button below the table.

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
Peter Django	06/16/2021 01:00 PM	James Smith	Signed by James Smith	Signed by James Smith	View Note
Jenny (Jen) Harris	06/16/2021 08:30 AM	James Smith	No	Not Needed	Edit (3683)
Alexis Wu	06/15/2021 10:30 AM	James Smith	No	Not Needed	Start Note

3. Click the **Unlock** button. If the note is not locked yet, it will read **Sign & Lock**.

+ Amendments Revisions View Fax Unlock Send to Onpatient Print sections

H&P SOAP ADDITIONAL APPS

Status: Locked by Rendering Provider + Amendments Revisions View Fax **Unlock** Send to Onpatient Print sections

To change note format, click on Clinical > Complete Note Format.

lock 1 / 1 100%



Dr. Nick's Walk-In Clinic
Patient: Jenny (Jen) Harris DOB: 02/11/1980 Sex: F
Provider: James Smith Visit: 06/16/2021 8:30AM Chart: HAJE000001
Office: Telehealth Address: 229 Schilling Circle, Hunt Valley, MD, 21031

Medications & Allergies:

Current Medication & Dosage	Dispense	SIG	PRN?	Indication
Mirena 52 mg intrauterine device	0	0	No	
Flonase 50 mg/100 mcg nasal spray	0	0	No	
Cranberry oral capsule	0	0	No	
12 Hour Nasal	20,000		No	

4. A window will open with a message. To continue, click **Unlock**.