

Sign and Lock Clinical Notes

Last modified on 09/05/2025 8:01 pm EDT

Sign and lock a clinical note | Electronic signatures for users acting on behalf of providers

Sign and lock a clinical note

Clinical notes are rendered in PDF format.

1. To open a clinical note, do one of the following:
 - Open the appointment and click **View Clinical Note**.

The screenshot shows the 'Schedule Appointment' form. At the top, there are tabs for 'Appointment', 'Billing', 'Eligibility', 'Vitals', 'Growthcharts', 'Flags', 'Log Comm.', 'Revisions', 'Custom Data', and 'MU Helper'. The 'Appointment' tab is selected. Below the tabs, there are radio buttons for 'Type' with options 'Appointment' (selected), 'Video Visit', 'Walk-in', 'Transition of Care', and 'Referral'. A warning message states: 'WARNING: This patient is pre-populated sample data.' and 'Patient Statement Balance: \$900.00 Generate Statement'. Below this, it says '6 past appointments'. The form is divided into two main sections. The left section contains fields for 'Patient' (Peter Django - 05/01/2000), 'Reason' (Follow-up Appointment), 'Scheduled' (09/04/2025), 'Time' (03:30PM), 'Duration' (30 minutes), 'Notes', and 'Consent Forms' (HIPAA Data Use Agreement (default)). The right section contains fields for 'Office' (Primary Office), 'Profile' (Follow-up Visit), 'Eligibility Profile' (-----), 'Exam' (Exam 1), 'Color' (blue), 'Status' (Complete), and a 'View Clinical Note' button. At the bottom right, there is a 'View All Appointments' button.

- From the patient's chart sidebar, select **Appointments** and then **Edit Note** (for the specific appointment)

The screenshot shows the patient chart sidebar for Peter Django. The sidebar includes sections for 'Patient Chart', 'Patient Summary', 'Demographics', 'Appointments', 'Clinical Dashboard', 'Documents', and 'Eligibility'. The 'Appointments' section is expanded, showing 'Future Appointments' and 'Past Appointments'. The 'Past Appointments' table has columns: Scheduled Time, Provider, Reason, Notes, Office, Exam Room, Appointment Status, Billing Status, # Reminders, Profile, and Actions. The table shows one appointment: 'Thu Jul 10, 2025 9:30a.m.', 'Kate Provider', 'Follow-up Appointment', 'Primary Office', 'Exam 1', 'Appointment Status', 'Billing Status', '0', 'Follow-up Visit'. The 'Actions' column for this appointment has two buttons: 'Edit Appointment' and 'Edit Note' (highlighted with a red arrow).

- Select **Clinical > Clinical Notes** and select **Start Note** or **Edit Note** for the note you need to complete and lock.

SOAP Notes Clinical Report

Offices [Edit Selection](#)
Primary Office, West Office

Providers [Edit Selection](#)
Helena Provider

Locked Status ☐ Need supervising ☐ Need rendering ☐ Exclude Cancelled, No-Show, and Rescheduled ☐ Exclude Optional Clinical Notes **View Last:** Day Week Month Year

Patient's Name User's Name Contains Text 08/04/2025 09/04/2025 [Refresh](#)

[Export Report To Excel](#) [Print non-blank Clinical Notes in Report](#) [Bulk Lock Non-Blank Notes](#) PAGE 1 OF 1

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
Eva Genmark	08/08/2025 05:00 PM	Kate Provider	No	Not Needed	Edit Note
Eva Genmark	08/08/2025 04:00 PM	Kate Provider	Signed by Kate Provider	Not Needed	View Note

2. Select Preview Note.

H&P SOAP ADDITIONAL [View Appointment](#) [Quick History](#) [Copy Previous Note](#)

Preview Note [OnPatient / Check-In](#) [CC / History of Present Illness](#) [Med / Fam / Social History](#) [Medications & Allergies](#) [Review of Systems](#) [Physical Exam](#)

Peter Django (Male | 25 years old | 05/01/2000 | DJPE000001) Sara Sample | Appt: 04/24/2025
Followup Appointment [Note Saved](#)

[Apple Health App Data](#) [Growth Charts](#) [Vitals](#) [Print section](#) [Fax section](#)

☒ Yes ☐ No Include in Note *Add to note* must be checked for this to render.

In the clinical note preview, the signature shows as pending e-signature at the bottom of the note until it is signed and locked.

Assessment:

Type	Code
ICD-10-CM Condition	M5

Medications & Allergies

[Page 1] **Pending e-signature**
was generated at 10/19/2020 9:17AM Powered by drchrono

3. Select Sign & Lock.

H&P SOAP ADDITIONAL **Status: Not Locked** [Amendments](#) [Revisions](#) [View](#) [Fax](#) [Sign & lock](#) [Edit Sections](#) [Print sections](#)

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

note_502782_360665142_c1767841-a... 1 / 1 100% [Download](#) [Print](#)

Chief Complaint: Follow-up Appointment

Plan:
LABORATORY ORDERS: CBC with diff

Type	Code	Modifiers	Quantity	Description
CPT	99213		1.00 UN	OFFICE O/P EST LOW 20 MIN

After the note is signed and locked, the e-signature of the rendering provider appears with a date/timestamp.

[Page 1 of 7] **E-signed by Dr. Sara** on 08/12/2025 4:48PM EDT
This page was generated at 08/12/2025 4:48PM EDT Powered by DrChrono

Electronic signatures for users acting on behalf of providers

Rendering providers and staff

When providers or staff use the practice group dropdown to access a primary provider's account and sign and lock a clinical note on their behalf, the footer of the clinical note PDF indicates that the note was signed on behalf of that provider.

Electronic signature format

E-signed by [user who locked the note] on behalf of [provider the patient had the appointment with] on [date/timestamp]

Supervising providers

The rendering provider and staff user's logic also applies to the supervising provider workflow.

When supervising providers use the practice group dropdown to access a primary provider's account and sign and lock a clinical note on their behalf, the footer of the clinical note PDF indicates that the note was signed on behalf of that provider.

[Page 1 of 10]	E-signed by Lily Jackson on behalf of Wilma Thomas on 09/05/2025 9:45AM EDT This page was generated at 09/05/2025 9:45AM EDT	Powered by DrChrono
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Electronic signature format

Supervising E-signature by [user who locked the note] on behalf of [supervising provider assigned to the appointment] on [date/timestamp].

E-signed by [user who locked the note] on behalf of [provider the patient had the appointment with] on [date/timestamp]

[Page 1 of 10]	Supervising E-signature by Wilma Thomas on behalf of Christine [redacted] on 09/05/2025 9:45AM EDT E-signed by Lily Jackson on behalf of Wilma Thomas on 09/05/2025 9:45AM EDT This page was generated at 09/05/2025 9:45AM EDT	Powered by DrChrono
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Clinical note revision history

Rendering providers and staff



The clinical note revision history shows the **Locked By** user as the: [user who locked the note] on behalf of [provider the patient had the appointment with]. See the image in the [Supervising providers](#) section.

Supervising providers

The clinical note revision history shows the **Locked By** user as the [user who locked the note] on behalf of [provider the patient had the appointment with].

The **Supervisor Locked By** user is the [user who locked the note] on behalf of [supervising provider assigned to the appointment].

Note Information

Date of Service	Locked By	Locked At	Supervisor Locked By	Supervisor Locked At	
Sep 5, 2025 10:30 AM	Lily Jackson on behalf of Wilma Thomas	Sep 5, 2025 9:45 AM	Wilma Thomas on behalf of Christine 	Sep 5, 2025 9:45 AM	View Note 

Audit Log

The user who locked the clinical note appears in the **Audit Log**.
