

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:
 - o 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'. Below the tabs, there are radio buttons for 'Type' (Appointment, Video Visit) and checkboxes for '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'. A section for '6 past appointments' is visible. The main form fields include: Patient (Peter Django - 05/01/2000), Reason (Follow-up Appointment), Scheduled (09/04/2025, Time 03:30PM), Duration (30 minutes), Notes, Consent Forms (HIPAA Data Use Agreement), Office (Primary Office), Profile (Follow-up Visit), Eligibility Profile, Exam (Exam 1), Color, Status (Complete), and a 'View Clinical Note' button.

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

The screenshot shows a patient's 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' (No Future Appointment) and 'Past Appointments'. The 'Past Appointments' table has the following data:

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Appointment Status	Billing Status	# Reminders	Profile	Actions
Thu Jul 10, 2025 9:30a.m.	Kate Provider	Follow-up Appointment		Primary Office	Exam 1			0	Follow-up Visit	Edit Appointment Edit Note

- o 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

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	MC

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% Print Share Refresh Close

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 Powered by DrChrono
This page was generated at 08/12/2025 4:48PM EDT

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.

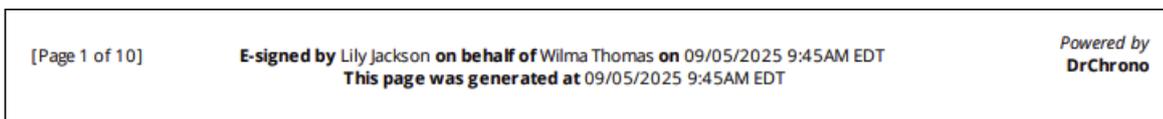
Electronic signature format

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.

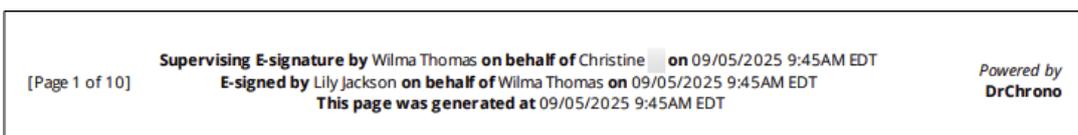
When supervising providers use the practice group dropdown to access a primary provider's account and sign and lock a clinical note on their behalf, the footer of the clinical note PDF indicates that the note was signed on behalf of that provider.



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]



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**.
