

# How do I lock a clinical note?

07/08/2024 8:01 pm EDT

With DrChrono you can electronically sign a note when the note is locked. Clinical notes are rendered in PDF format. There are several ways to navigate to the clinical note in order to sign and lock the document.

The most common ways to get to the clinical note are:

1. Open the appointment and click **View Clinical Note**.

**Schedule Appointment**

Appointment | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type  Appointment  Video Visit  Walk-in  Transition of Care  Referral

**WARNING: This patient is pre-populated sample data. 1 past appointments**

Provider: James Smith  
Patient: Peter Django - 12/21/1993  
Reason:   
Scheduled: 10/19/2020 Time 09:00AM  
Duration: 30 minutes  Allow overlapping  
Notes:   
Consent Forms:

Billing: - If different to provider -  
Office: Primary Office  
Profile: -----  
Exam: Exam 1  
Color:    
Status:   
0h 3m

[View Clinical Note](#) [View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.  
 Arrange a Follow-up Reminder  
 View Active Reminders:  
Choose a Reminder Profile:

2. From the patient's chart, go to **Appointments** and click **Edit Note**.

Schedule Clinical Patients Reports Billing Account Help

+ Add new patient

Demographics | **Appointments** | Clinical Dashboard | Documents | Tasks | Problem List | Medication List | Send eRx | Allergy List | Drug Interactions | CQMs | Intake Data

**Peter Django** (Male | 26 years old | Dec. 21, 1993)

Phone: (844) 569-8628 Email: Missing Date Added: Aug. 13, 2020  
Address: 1000 W Maude Ave Last Scheduled Appt: Mon Oct 19, 2020  
Sunnyvale, CA 94085 Next Scheduled Appt:  
CDS: Adult Immunization Schedule Age: 22-26

New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

**Future Appointments** Print Future Appointments

| Scheduled Time        | Provider | Billing Provider | Reason | Notes | Office | Exam Room | Address | Appointment Status | Billing Status | Profile | Actions |
|-----------------------|----------|------------------|--------|-------|--------|-----------|---------|--------------------|----------------|---------|---------|
| No Future Appointment |          |                  |        |       |        |           |         |                    |                |         |         |

**Past Appointments** Print History

| Scheduled Time            | Provider    | Billing Provider | Reason | Notes | Office         | Exam Room | Appointment Status | Billing Status | # Reminders | Profile | Actions                   |
|---------------------------|-------------|------------------|--------|-------|----------------|-----------|--------------------|----------------|-------------|---------|---------------------------|
| Mon Oct 19, 2020 9:00a.m. | James Smith | None             |        |       | Primary Office | Exam 1    |                    |                | 0           |         | <a href="#">Edit Note</a> |

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

Schedule Clinical Patients Reports Billing Account Help

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

MU REPORTING  
 Meaningful Use 2014  
 Meaningful Use 2015 (Final Revision)  
 MIPS/MACRA  
 Clinical Quality Measure

Rendering  Exclude Cancelled, No-Show, and Rescheduled View Last: Day Week Month Year

Contains Text 10/12/2020 10/19/2020 Refresh

Notes in Report Bulk Lock Notes PAGE 1 OF 1

| Rendering Provider | Locked (Rendering Signed) | Supervising Signed Off |                           |
|--------------------|---------------------------|------------------------|---------------------------|
| James Smith        | No                        | Not Needed             | Start Note<br>Edit (8463) |
| James Smith        | No                        | Not Needed             |                           |
| James Smith        | No                        | Not Needed             | Cancelled                 |

Once you have arrived at the clinical note and are ready to sign click **Preview Note**.

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

Preview Note

onpatient / Check-In  
 Subjective  
 Objective  
 Assessment  
 Plan  
 Medications & Allergies  
 Billing

Jenny (Jen) Harris (Female | 40 years | 02/11/1980 | HAJE000001) James Smith | 10/15/2020

Back Pain  
 Primary Insurer: (62308) Cigna

Growthcharts Vitals Print section Fax section

Include in Note "Add to note" must be checked for this to render.

HPI  
 Jenny (Jen) Harris is a 40 year year old female presenting with back pain.

Social HX  
 non-contributory

Family HX  
 None

Past Medical HX  
 na

In the note preview screen, the signature will be listed as **Pending** at the bottom of the note until it is signed and locked. When you are ready to sign and lock the note click **Sign & Lock**.

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

Preview Note

onpatient / Check-In  
 Subjective  
 Objective  
 Assessment  
 Plan  
 Medications & Allergies  
 Billing

Status: Not Locked

Amendments Revisions View Fax Sign & lock Edit Sections Print sections

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

no tremors or other involuntary movements ENDOCRINE: no heat or cold intolerance, no excessive sweating, no excessive thirst or hunger, no polyuria, no change in glove or shoe size PSYCHIATRIC: no nervousness, no depression, no memory change

GENERAL: AAOx3, NAD, normal level of consciousness, good personal hygiene  
 HEENT: no gross deformity, sclerae anicteric, EOM, normal conjunctivae, PERRLA, no sinus tenderness, no boggy nasal mucosa, no erythema of throat, no exudate of throat, no lesions of throat, no enlargement of tonsils, TM clear  
 SKIN: no lesions, no rash  
 NECK:  
 Supple. No lymphadenopathy/tenderness (-) thyromegaly  
 CARDIOVASCULAR: RRR, no JVP, no carotid bruits, no murmurs, rubs or gallops, S1 S2 present, no S3, no S4 LUNGS: CTAB, no adventitious sounds ABDOMEN: soft, non-tender, non-distended, no surgical scars, no trauma on inspection, normal bowel sounds all 4 quadrants, no masses noted on light or deep palpation, no CVA tenderness, no hepatosplenomegaly, no rebound tenderness

Assessment:  

| Type                | Code |
|---------------------|------|
| ICD-10-CM Condition | M50  |

Medications & Allergies

Pending e-signature  
 was generated at 10/19/2020 9:17AM

[Page 1] Powered by drchron

After the note is signed and locked, the e-signature of the rendering provider will appear with a time and date

stamp reflecting when the note was signed and locked.

E-signed by James Smith on 10/19/2020 9:25AM EDT  
This page was generated at 10/19/2020 9:25AM EDT

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

View Locked Note

onpatient / Check-In

Subjective

Objective

Assessment

Plan

Medications & Allergies

Billing

| Type | Code  | Modifiers | Quantity | Description             |
|------|-------|-----------|----------|-------------------------|
| OP1  | 1132F |           | 1.00 UN  | EPSD BK PAIN FOR >6 WKS |

PHYSICAL THERAPY: 3x/week/6 weeks

[Page 2] E-signed by James Smith on 10/19/2020 9:25AM EDT  
This page was generated at 10/19/2020 9:25AM EDT Powered by drchrono

The note status bar will reflect: Locked by Rendering Provider, along with the option to unlock the clinical note.

Status: Locked by Rendering Provider

+ Amendments Revisions View Fax Unlock Send to Onpatient Print sections

All patient data listed in this article is sample data. This is not a real person or real patient data.