

## HOW TO LOCK A PATIENT CHART

Refer to Figures 1.0 to 1.2

1. Click the **'EMR'** icon on the main menu.
2. Click the **'Encounter Notes'** tab
3. Load the patient using the **'Patient Search Tool'**
4. Click the **'Green Shield'** icon to the left of the **'Patient Search Tool'** **1**
5. Determine who should still have access to this chart, and select the appropriate option: **2**
  - a. All Providers
  - b. Myself Only (this would be only the user locking the chart)
  - c. Selected Users
    - i. Select which users in your office should still have access
    - ii. Click **'OK'** **3**

Figure 1.0

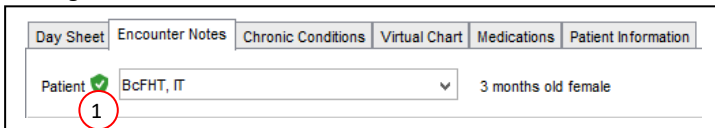


Figure 1.1

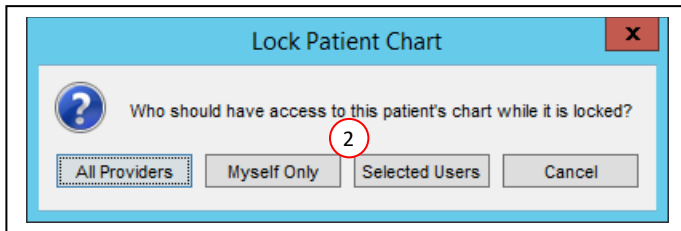
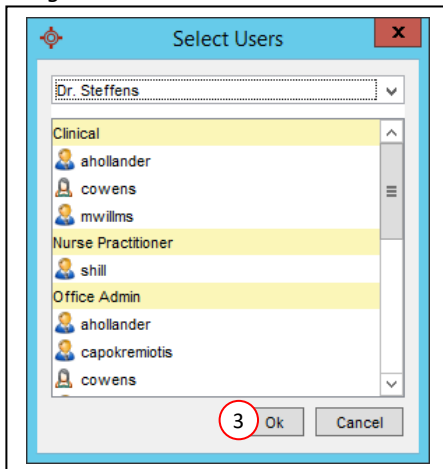


Figure 1.2

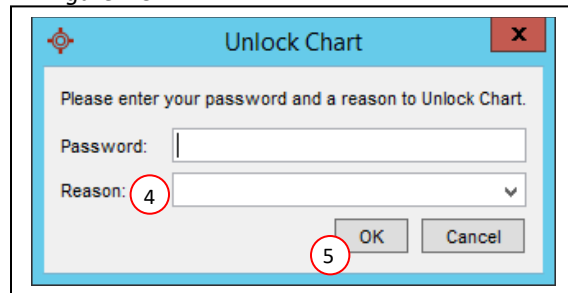


## HOW TO UNLOCK A PATIENT CHART

Refer to Figure 1.0 and 1.3

1. Click the **'EMR'** icon on the main menu.
  2. Click the **'Encounter Notes'** tab
  3. Load the patient using the **'Patient Search Tool'**
  4. Click the **'Red Shield'** icon to the left of the **'Patient Search Tool'** **1**
  5. Enter your password and the reason for unlocking the chart. **4**
  6. Click **'OK'** **5**
- Note:** Only the user that locked a patient chart is able to unlock the chart.

Figure 1.3



## HOW TO LOCK/MASK SPECIFIC CHART ITEMS

Refer to Figure 1.4

1. Click the **'EMR'** icon on the main menu.
  2. Click the **'Encounter Notes'** tab
  3. Load the patient using the **'Patient Search Tool'**
  4. Locate the item to be Masked
  5. Hold **'ALT'** on the keyboard and click on the item to be masked
  6. Select the **'Masked'** checkbox, **6** and then click the **'Green Plus Sign'** **7** to add other users to have permissions to that item still. If no users are added, only the user masking the item will still have access.
  7. Click **'OK'** **8**
- Note:** To unmask an item, ALT + Click on it again, uncheck "Masked" and enter your password and the reason for unlocking the chart. Only the user that masked an item can unmask it.

Figure 1.4

