

Lock Notes/Lock After Verifying

We realize there are a variety of different users of ATS. We want to give options for those who need or want to verify their notes that were entered to be able to do so, and lock the note after it was verified. This works separately and independently from the [Lock Notes](#) found in Site Info.

Step 1:

Enabling the user to “lock notes”

To enable your users to save and lock their notes after they verified the content, you need to turn this feature on in their User Accounts. Begin by going to Admin—>Users—> and then either searching for an individual user or using the multi-user update if you have a lot of staff to make this change for. Add a check mark to the “lock notes” area.

The screenshot shows the 'Admin' menu with 'Users' selected. The 'Users' dropdown menu is open, highlighting 'Multi User Update' with a red box. A red arrow points from this option to the 'User Multi-Function' window. In the 'User Multi-Function' window, the 'Security' tab is active, and the 'Allowed to Lock Notes' checkbox is checked. Other security options include 'No Report Access', 'Allow Report Printing', 'User can See All Injuries on the Athlete Details', 'Allowed to Submit/Print Claims', 'Allow Report Exporting', 'Group Emails Allowed', and 'Note Batch Allowed'. The 'Access' table lists various modules and their permissions, with 'Allowed to Lock Notes' checked for all listed modules.

The screenshot shows the 'User Multi-Function' window for user 'Joe Streckfus'. The 'Can Lock Note' checkbox is checked. The 'Teams' tab is active, showing a list of teams and their permissions. The 'Can Lock Note' checkbox is highlighted with a black box. The 'All Users' checkbox is also checked. The 'Refresh' button is highlighted in green.

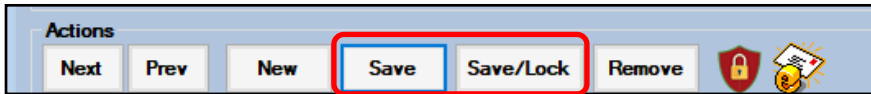
Team	Permissions
(none)	
Coed	Guest Team
Men	Sent by ATS
Guest Teams	
Guest	demo
Guest	test
Joe Tech	
Coed	Behavioral Health
Coed	Nutrition
Coed	Track
Men	Baseball
Men	Football
Men	Mens Basketball
Women	Softball
Women	Womens Basketball
Joe U East	
Coed	Power Walking
Coed	Underwater Basketweaving
Joe U North	
Coed	Badminton
Men	Lacrosse

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Step 2:

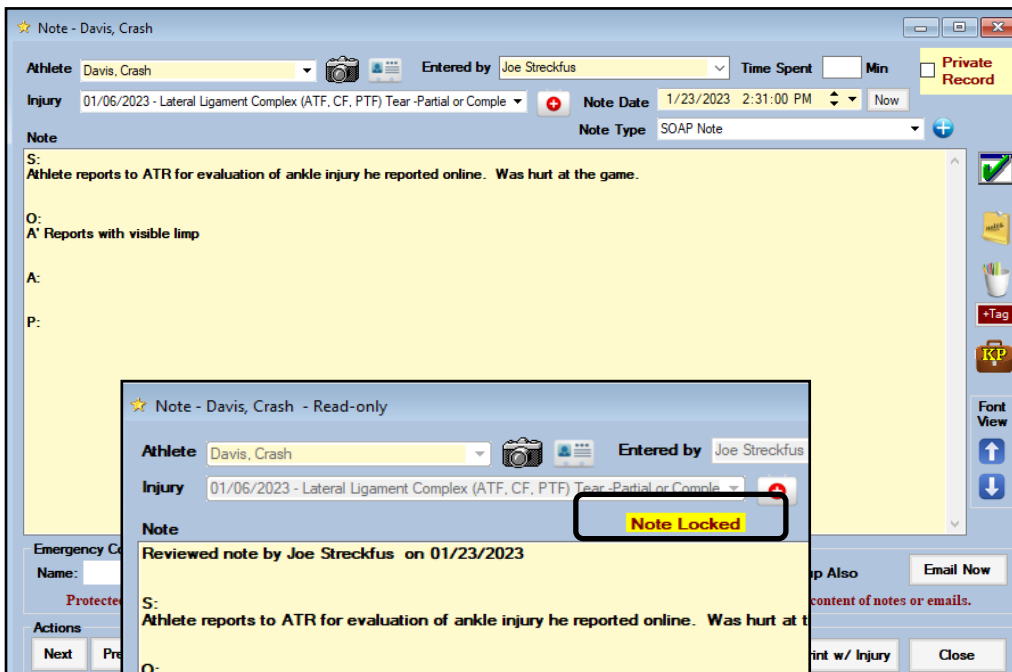
Enter your notes for your athletes.

After you or your admin have given you the ability to save/lock notes enter your notes the same as you would. You will then see there are now a Save and Save/Lock.



Save—Nothing changes when using the save button, it will save your progress and allow you to go back and complete the note.

Save/Lock— This is the new button that is dependent on the Allowed to Lock Notes box being checked. This button when used, will save and lock the notes regardless if they have had a chance to be reviewed or not. Using the save/lock button will save the note and lock the note and not allow it to be edited further.



The example note here, could be a note I started and was interrupted prior to being able to complete it. I save the note and closed out.

The example note, I came back and finished off my note and save again. Now say I want to review my note for accuracy and I want to lock it from being edited.

I reviewed my note and put in my own note that I did review and then hit the Save/Lock. You will see that it then greys out some of the features, the new/remove buttons will not work from that screen. You also will not be able to change it from the injury it was tied to.