

Epic Clinical “Locks” – Activity/Navigator

Lock	Activity/ Navigator /Both	Description
Allergies	Both	Updating allergies in either the Allergies activity or navigator section locks both.
Annotated Images	Activity	Opening this activity locks the activity.
Care Plan	Activity	Multiple users can document on care plan problems, goals, and interventions at the same time. However, multiple users cannot edit the same goal at the same time, and a user cannot modify a goal attached to a problem that another user is editing
Care Teams	Activity	Opening this activity locks the activity.
Continued Care & Services Coordination	Navigator Section	Opening these navigator sections to edit locks the specific section. Users can update different sections within the workflow (Destination, DME, etc.) at the same time.
Demographics	Activity	Opening this activity locks the activity.
Discharge Milestones & Expected Discharge Date	Navigator Section	Opening either of these navigator sections locks both sections. These sections do not close automatically when a user leaves them, so users need to close them to release the lock. Registration, case management, and bedside clinical users are all likely to use these sections.
Doc Flowsheets	Activity	Users cannot file information for the same flowsheet row at the same time. Multiple users can document in the same template at the same time.
Document List	Activity	Opening this activity locks the activity.
Episodes of Care	Activity	Opening an episode lock only that episode. The exception to this is that all dialysis episodes are locked if one is open.

Follow-Up	Navigator Section	Opening this navigator section locks the section.
Health Maintenance	Activity	Opening this activity locks the activity.
History	Both	Updating patient history in either the History activity or navigator section locks both.
Level of Service	Both	Opening this activity or navigator section locks both.
MAR	Activity	Users cannot edit the same administration at the same time. Multiple users can view the MAR at the same time and can document different medications at the same time.
Media Manager	Activity	Opening this activity locks the activity.
Notes	Activity	Users cannot document the same note at the same time. For example, if a resident is editing a note, the attending physician cannot edit or cosign that note. Multiple users can be in the Notes activity and can write different notes at the same time.
OB History	Navigator Section	Updating obstetric history in either the History activity or navigator section locks both.
Patient Education	Activity	Opening this activity locks the activity.
Patient Instructions AVS Sections	Navigator Section	Opening these navigator sections to edit locks the specific section. Users can update different sections within the workflow (Medications, Activity, etc.) at the same time.
Problem List	Both	Updating problems in either the Problem List activity or navigator section locks both. It also locks the patient's history.
Sign Visit	Activity	Opening a patient encounter locks the Sign Visit activity.
Tooth Chart	Activity	Opening the Tooth Chart locks both the Tooth Chart and the Today and Outstanding sections of the Treatment Plan.

Treatment Plan	Activity	Opening the Treatment Plan locks both the Tooth Chart and the Today and Outstanding sections in the Treatment Plan. Opening a visit or treatment in the Planned or Draft section of the Treatment Plan locks that visit or treatment. In addition, opening a visit or treatment in the Planned section prevents scheduling actions in Cadence.
Utilization Review	Activity	Opening this activity locks the activity.
Visit Diagnoses	Navigator Section	Opening this navigator locks the section.
Visit Info	Navigator Section	Opening this navigator locks the section.
Vitals (outpatient)	Navigator Section	Opening this navigator section locks the section. When a customer is documenting history in the Vitals section, it also locks the patient's history. Note: This does not apply to the inpatient vitals' flowsheet or flowsheet navigator section, which use flowsheet locking.