

When entered on an incorrect encounter, Dynamic Documents must be corrected by the authoring provider. Follow the steps in this flyer to ensure the notes are saved to the correct Financial Identification Number (FIN) and removed from the incorrect FIN.

STEP 1: Open the correct FIN (encounter) for the patient.

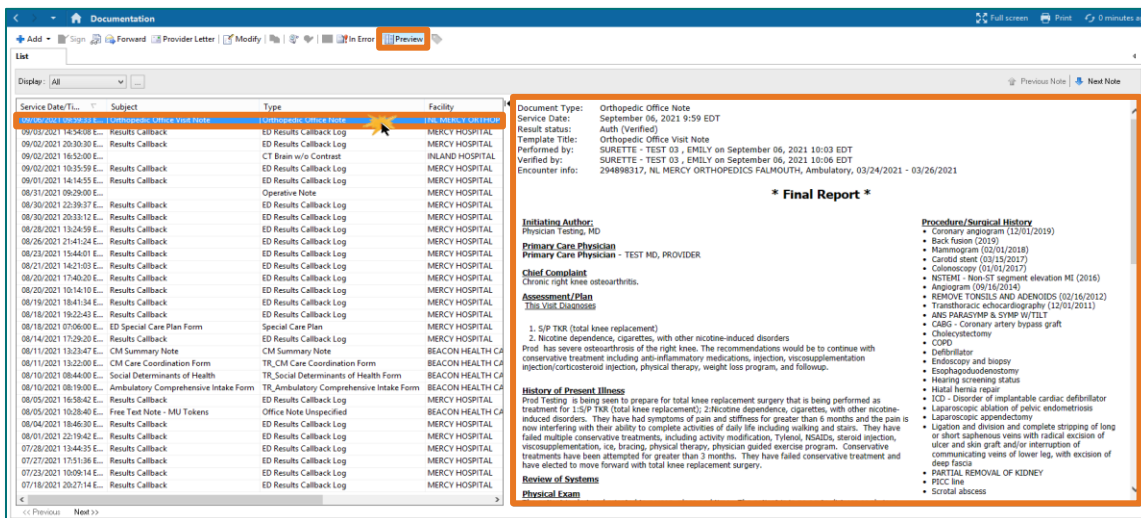
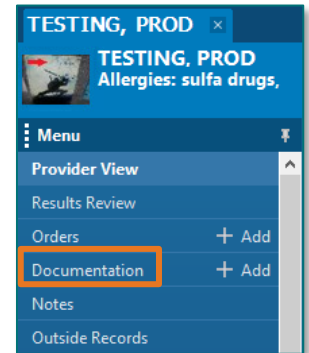
STEP 2: Click Documentation in the dark blue Menu.

NOTE: Do not click the +Add option next to the word Documentation.

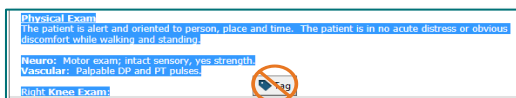
STEP 3: Select the Dynamic Documentation Note that was documented on the wrong FIN. If the Preview option is selected, the document will open in the right Preview panel.

STEP 4: In the Preview panel, highlight the text to be copied by holding the left click button down on the mouse and move over the text.

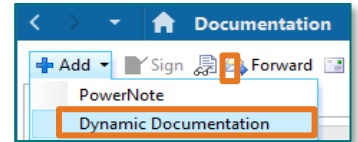
- While continuing to hold down the Control (Ctrl) key, press the C key at the same time to copy the text.



NOTE: Do not click Tag. Tagging Text will add a footnote to refer to the incorrect note that will be later marked in error.



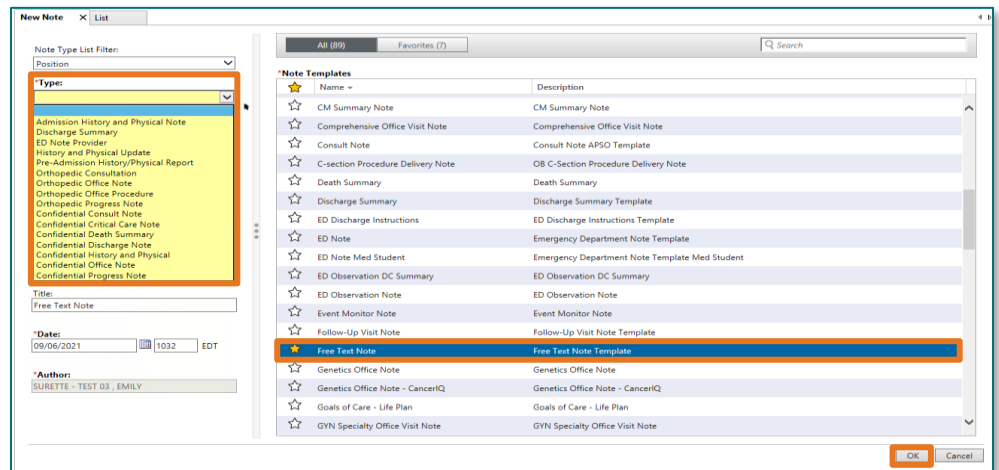
STEP 5: From Add click the drop-down caret and select **Dynamic Documentation**.



STEP 6: Select Free Text Note as the Note Template

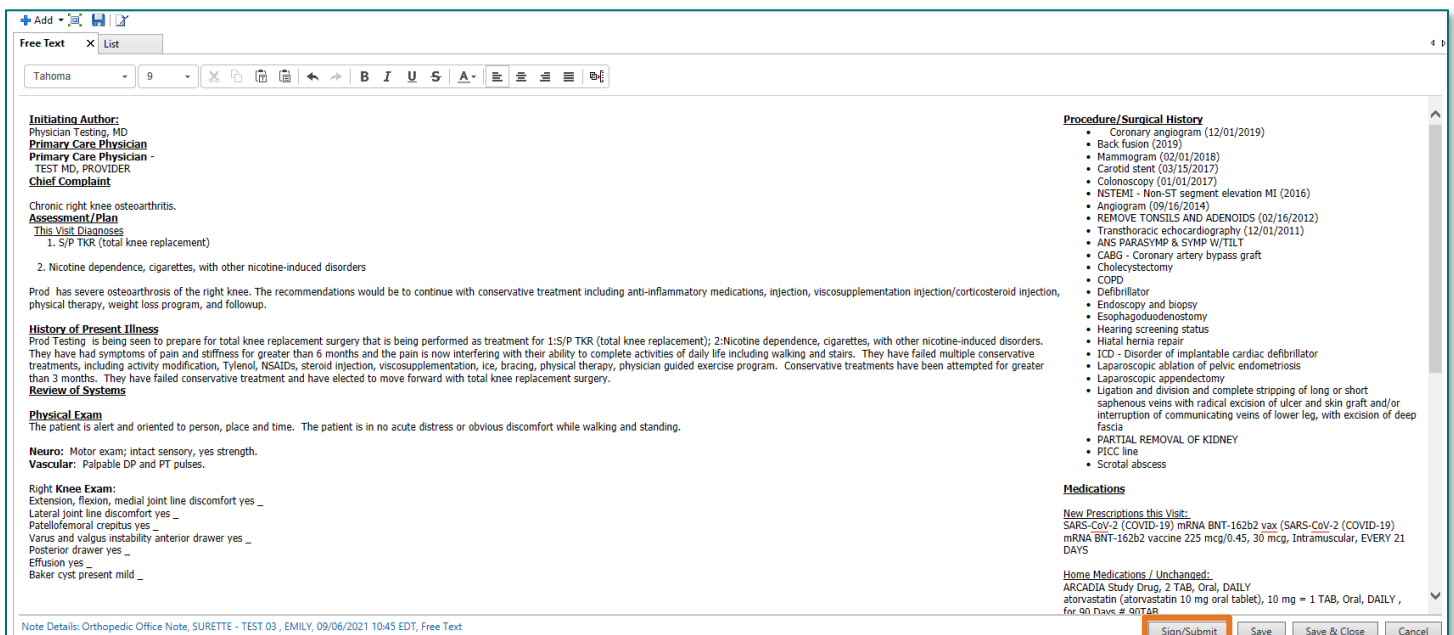
- Select the Note Type from the Type: drop-down menu.
- Click OK.

NOTE: Clicking the Star icon in front of the Note Template name will mark a template as a favorite. The template can then be accessed more quickly from the Favorites tab in the future.



STEP 7: Paste the copied text.

- While continuing to hold down the **Control (Ctrl)** key, press the letter **V** key at the same time to paste the copied text into the Free Text Note.
- Review the document to assure the documentation is correct and complete.
- Click **Sign and Submit**.



STEP 8: Change the date and time to match the **Date of Service** of the appointment, as seen in the patient banner bar.

STEP 9: Change the **Note Title** to reflect the type of visit.

STEP 10: Click **Sign**.

STEP 11: To mark the note documented on the incorrect FIN **In Error**, from **Documentation**, highlight the **Dynamic Documentation Note**.

The screenshot shows the 'Sign/Submit Note' dialog box. The 'Type' is 'Orthopedic Consultation'. The 'Author' is 'SURETTE - TEST 03, EMILY'. The 'Title' is 'Orthopedic Office Visit Note'. The 'Date' is '09/06/2021' and the time is '1424 EDT'. There are 'Sign' and 'Cancel' buttons at the bottom right.

- From the Options Banner, select **In Error**.

The screenshot shows the 'Documentation' window for a patient. The 'In Error' button is highlighted in the options banner. The list of notes is as follows:

Service Date/Ti...	Subject	Type	Facility	Au
09/13/2021 13:44:21 E...	Orthopedic Office Visit Note	Orthopedic Consultation	NL MERCY ORTHOPEDICS FALMOUTH	SU
09/10/2021 13:56:17 E...	Call patient with results	Reminders	BEACON HEALTH CARE MANAGEMENT	SU
09/09/2021 20:46:09 E...	Results Callback	ED Results Callback Log	MERCY HOSPITAL	RO
09/08/2021 16:41:02 E...	Results Callback	ED Results Callback Log	MERCY HOSPITAL	RO
09/07/2021 11:34:59 E...	Ambulatory Patient Education	Ambulatory Patient Education	BEACON HEALTH CARE MANAGEMENT	MC

STEP 12: In the **In Error Comment** window, document the reason the document is being marked in error. e.g., "Documented on wrong FIN."

STEP 13: Click **OK**.

The screenshot shows the 'In Error Comment - Optional' dialog box. The 'Comments' field contains the text: "Documented on wrong FIN. Documentation added to correct FIN, removing from incorrect FIN." There are 'OK' and 'Cancel' buttons at the bottom.