

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.

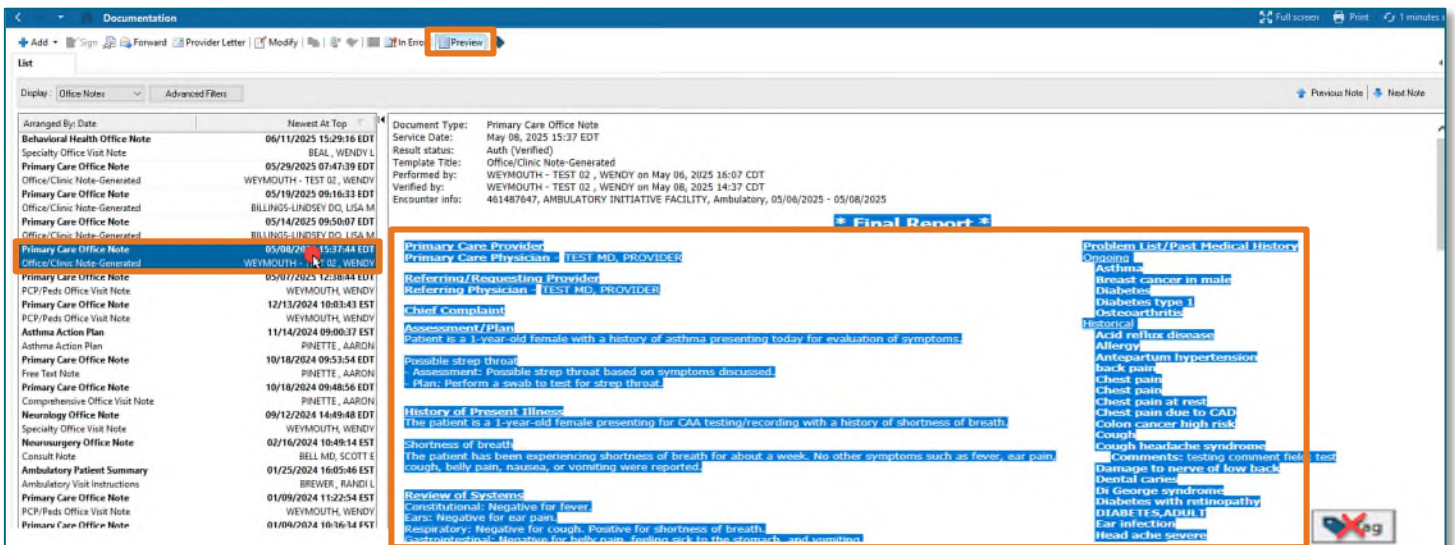
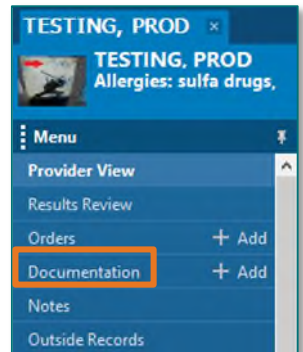
STEP 2: Click **Documentation** in the dark blue Menu.

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.

- Hold down the **Control (Ctrl)** key, press the C key at the same time to copy the text.

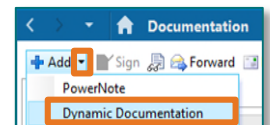


NOTE: Do not click Tag. Tagging text will add a footnote to refer to the incorrect note that will be later marked in error.

STEP 5: From Add click the dropdown caret and select **Dynamic Documentation**.

STEP 6: Select **Free Text Note** as the Note Template.

- Select the **Note Type** from the **Type:** dropdown menu.
- Change the **Title** to reflect the type of visit.
- Change the **Date of Service** to match the date and time of the appointment, as seen in the patient banner bar.



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.

The screenshot shows the 'New Note' dialog box. On the left, there's a 'Note Type List Filter' dropdown set to 'All'. Below it, a 'Type' dropdown is set to 'Free Text Note'. The 'Title' field is empty. The 'Date of Service' is set to 06/25/2025. The 'Author' is WEYMOUTH, WENDY. On the right, the 'Note Templates' list shows several templates, with 'Free Text Note' selected and marked as a favorite with a star icon. The 'OK' button is highlighted.

- Click OK.

STEP 7: Paste the copied text.

- 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: Click **Sign**.

STEP 9: To mark the note documented on the incorrect FIN **In Error**.

- From **Documentation**, select the incorrect Dynamic Documentation Note.
- From the Options Banner, select **In Error**.

The screenshot shows the 'TESTING, PROD (WILLOW)' interface. The 'Documentation' tab is selected. The 'In Error' button is highlighted. The 'In Error Comment - Optional' window is open, showing the comment: 'Documented on wrong FIN. Documentation added to correct FIN, removing from incorrect FIN.'

STEP 10: In the **In Error Comment** window, document the reason the document is being marked in error. e.g., "Documented on wrong FIN."

STEP 11: Click OK.