Northern Light Health℠

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.
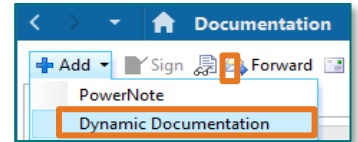
- While continuing to hold down the **Control (Ctrl)** key, press the **C** key at the same time to copy the text.
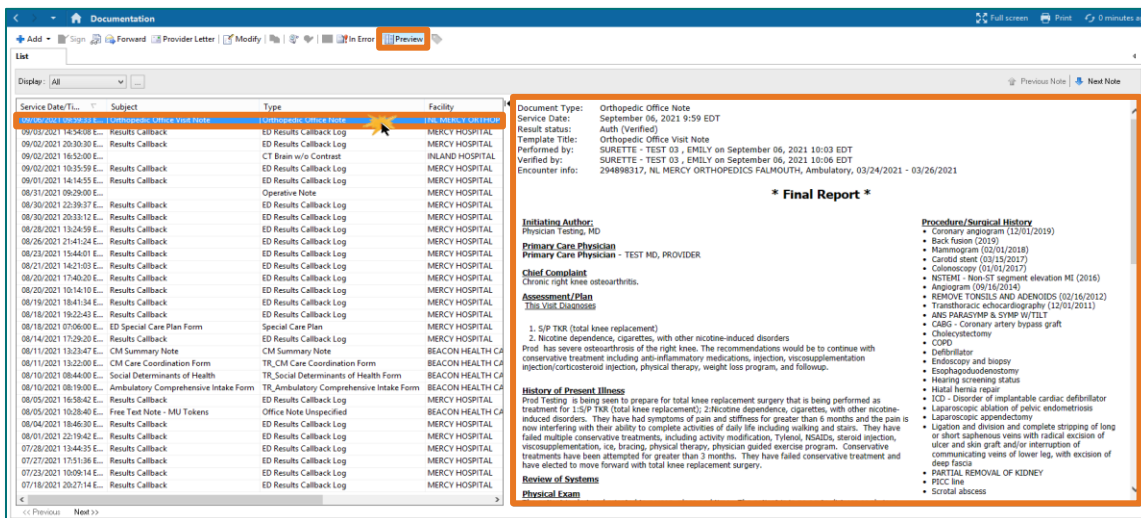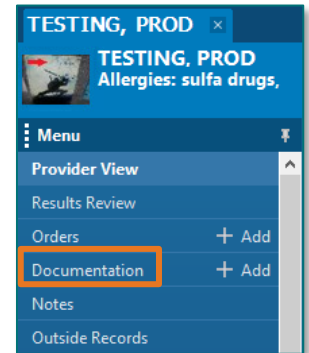
NOTE: **Do not click Tag. Tagging Text will add a footnote to refer to the incorrect note that will be later marked in error.**
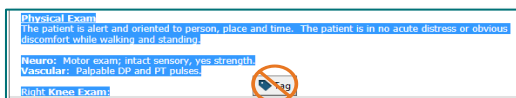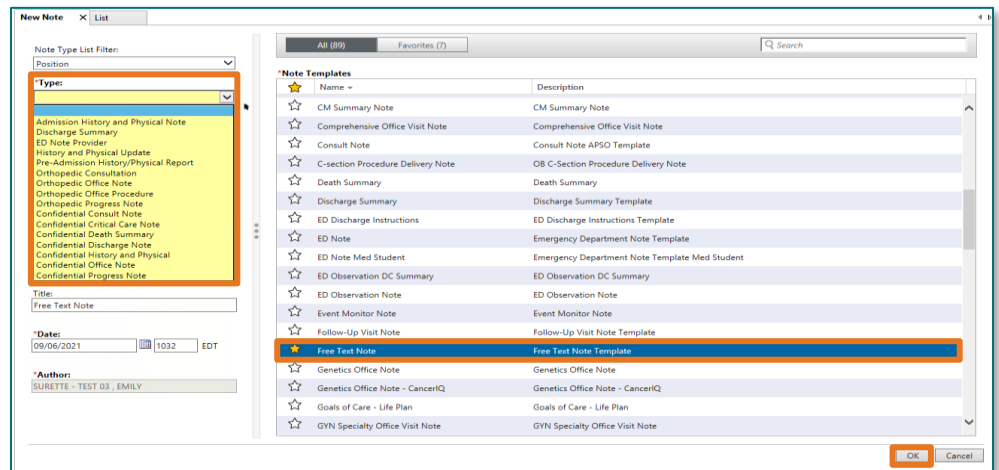
STEP 5: From **Add** click the drop-down caret and select **Dynamic Documentation**.

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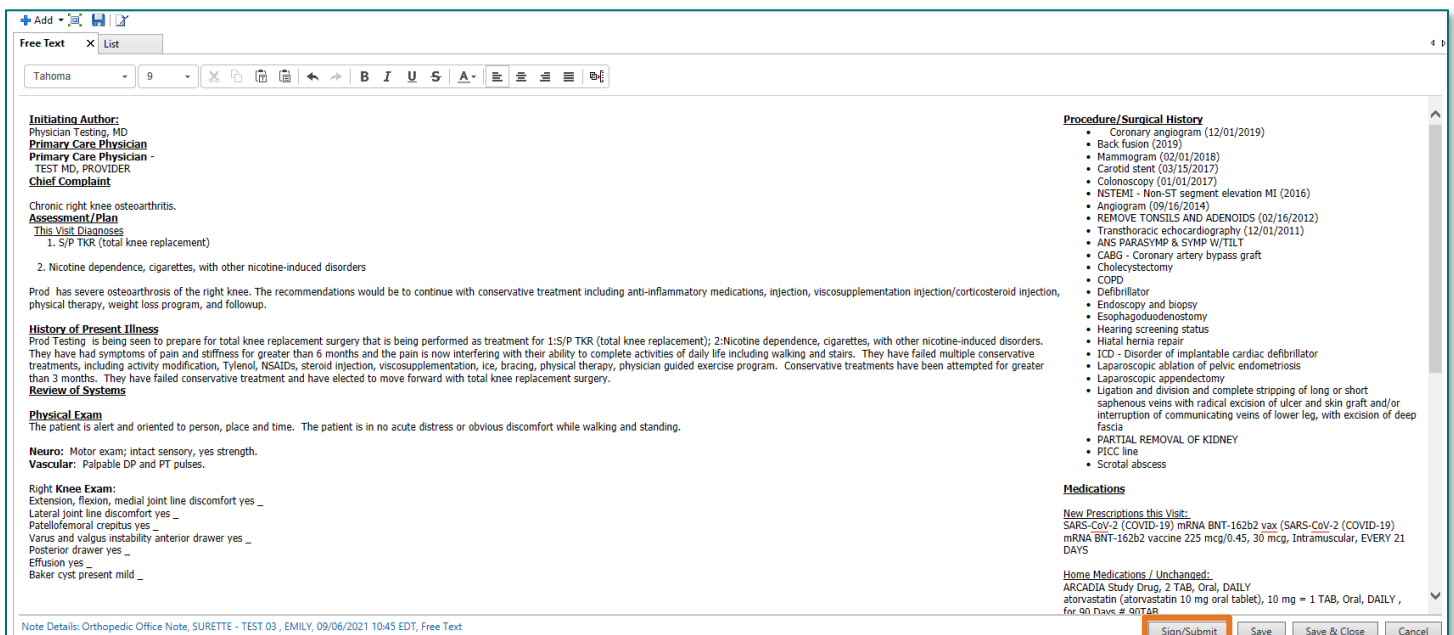
STEP 8: Change the date and time to match the **Date of Service** of the appointment, as seen in the patient banner bar.

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**.

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

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**.