From the Office of Health Informatics
Dynamic Documentation
Changing the Date of Service
June 2, 2025

Northern Light Health | Optum

At times the date of service may need to be changed in Dynamic Documentation. The process can occur prior to signing the note or after a note has been signed.
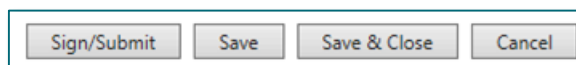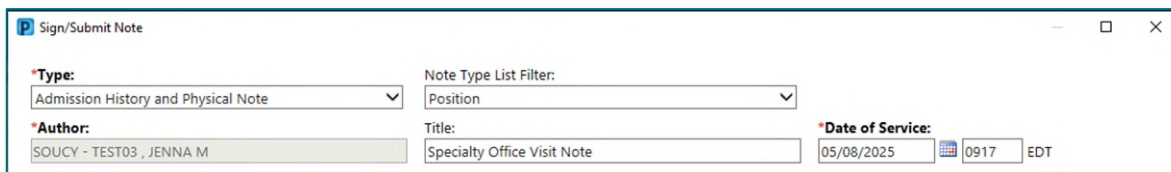
Changing the Date of Service Prior to Signing

➢ **Date of Documentation**

- The date documentation is being performed will be the date displayed on the note.

- If documentation is being done a date different than the date of service, the date will need to be changed.

➢ **Signing the Documentation**

- When the note is complete, select **Sign/Submit**.

- A pop-up box will appear.

| Sign/Submit | Save | Save & Close | Cancel |

- In the pop-up box, change the date to the appropriate date to reflect when the office visit was completed.

➢ **Viewing the Documentation**

- In the **Documents** component, the note will reflect the date the service was performed.

Document Type: Admission History and Physical Note
Service Date: May 08, 2025 9:17 EDT
Result status: Auth (Verified)
Template Title: Specialty Office Visit Note
Performed by: SOUCY - TEST03 , JENNA M on May 08, 2025 9:19 EDT
Verified by: SOUCY - TEST03 , JENNA M on May 08, 2025 9:19 EDT
Encounter info: 405022328, NL ORTHOPEDIC CARE ELLSWORTH, Outpatient, 11/15/2023 - 11/15/2023

- The header of the note will display the Service Date and the date the note was completed.

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## Changing the Date of Service Prior to Signing

If the Date of Service is not correct, use the following steps to modify the Date of Service.

STEP 1: Within the patient's chart, go to the Documentation component within the MPage.

STEP 2: Select the **Document** and click **Modify** in the details window.

STEP 3: Select if you would like to **Addend Note** or **Revise Note** and click **OK**.

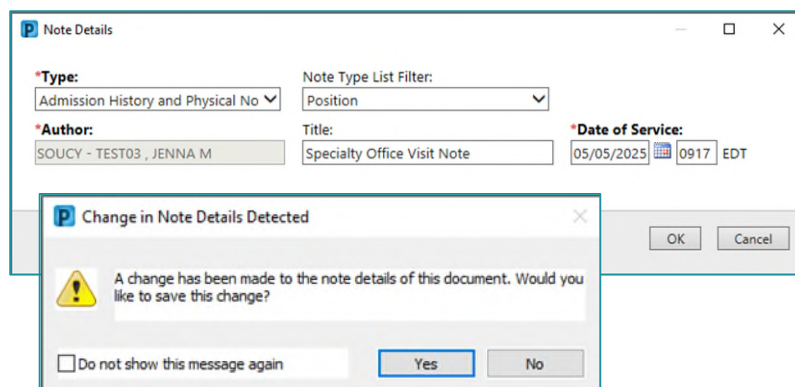**STEP 4:** Select the **Note Details:** hyperlink at the bottom of the window.
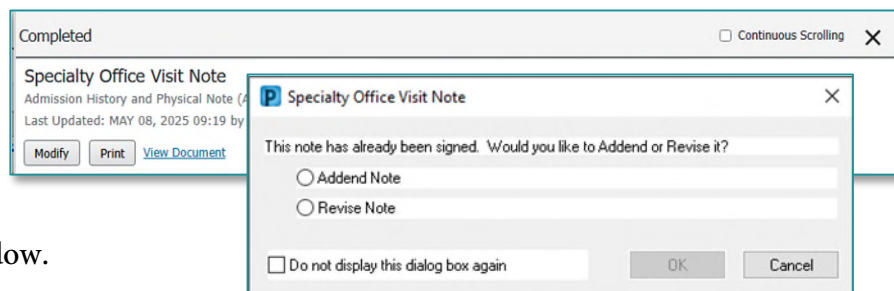
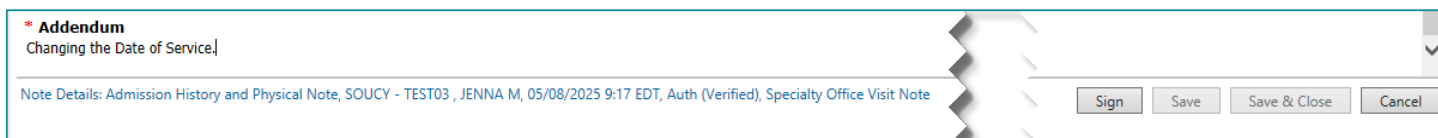**STEP 5:** Change the date to reflect the correct date of service.

STEP 6: Select **OK**.

STEP 7: Select **Yes**.

STEP 8: Insert an Addendum within the addendum section at the bottom of the note as to why an addendum is being made (changing date of service, etc.), the sign button will not appear until an addendum is added.

STEP 9: Select **Sign** to finalize the note.