From the Office of Health Informatics

Dynamic Documentation CC'ing Notes Electronically to Providers

June 2, 2025

Distribution of provider documentation is not automatic and must be indicated during the note signing process. This flyer reviews the steps to send documentation to another provider electronically, whether for review or signature.

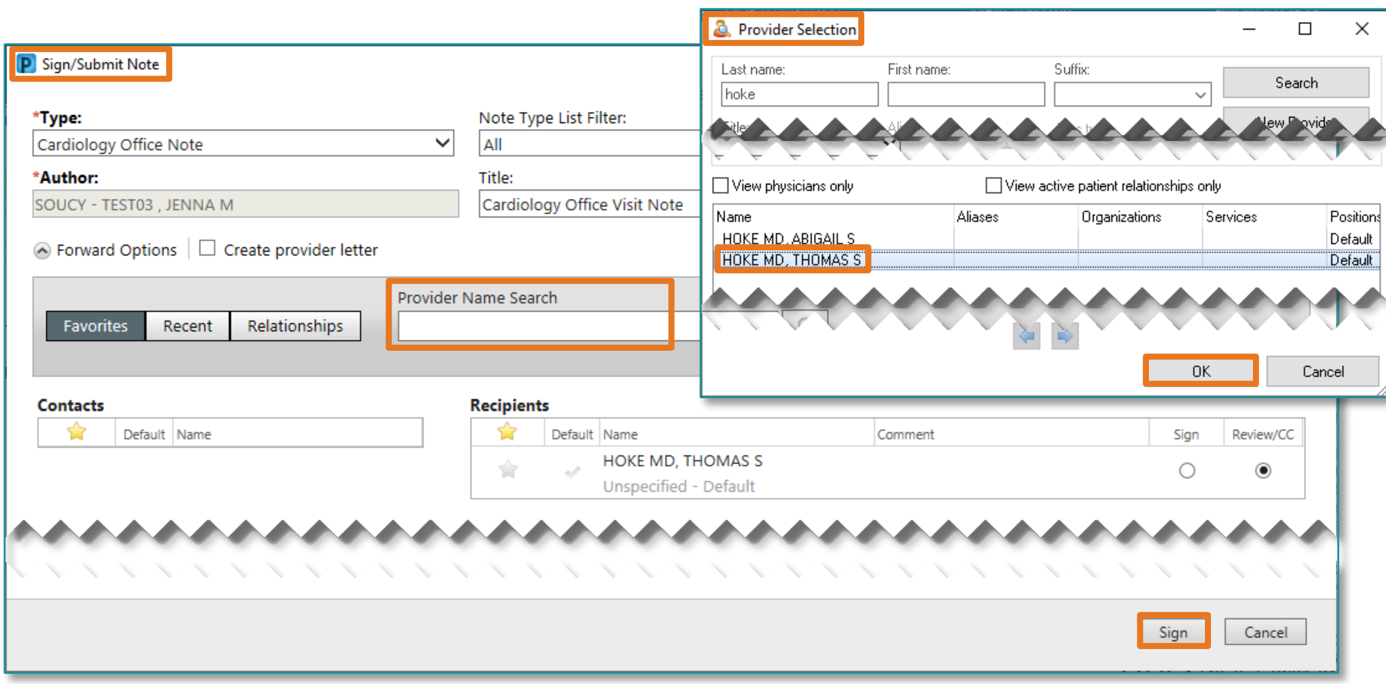
Selecting Recipients for Review/CC or Signature

Search for and find the intended recipient of the note. The note will be electronically distributed to that recipient. **This is inclusive of both in-system and out-of-system providers.**

STEP 1: From the **Sign/Submit Note** window, search for intended recipient in provider search field.

STEP 2: Select appropriate provider from the **Provider Selection** window and click **OK**.

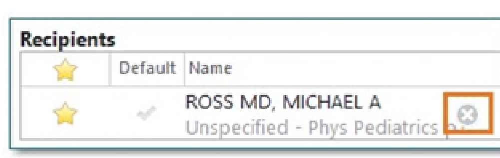
STEP 3: Select the **Sign** or **Review/CC** radio button as appropriate.



STEP 4: Click the **Submit** button.

NOTE: **Always double check the recipient list to ensure that the recipients listed are who the note(s) should be sent to. If there is a recipient in which the note should not be sent to, be sure to remove them.**

Removing a Recipient



STEP 1: Hover over the name of the recipient to remove.

STEP 2: Select the gray (x) to the right of the recipient's name.

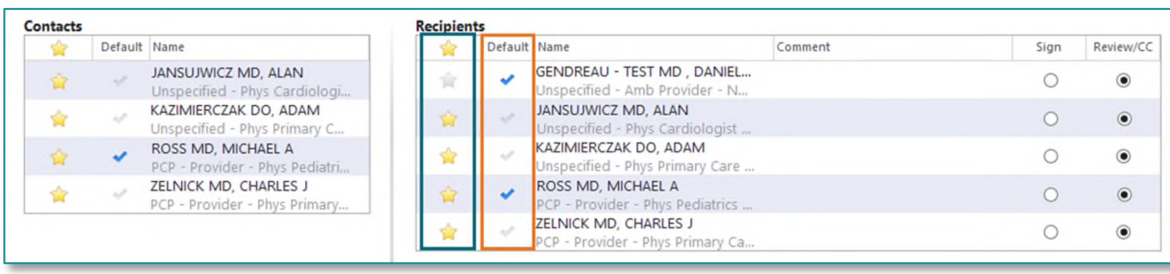
Identifying Favorite or Default Recipients

Recipients may be identified as a favorite and/or a default for more efficient endorsement selection. Once recipient has been identified, follow the steps below:

<u>STEP 1</u>: Select the **star icon**  to create a favorite. This will add the recipient to the contacts list on the left.

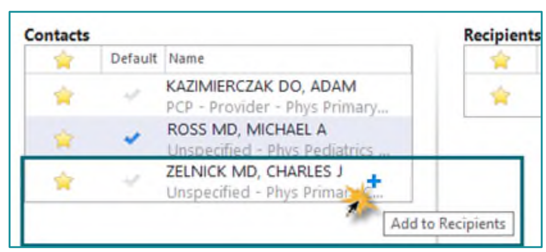
<u>STEP 2</u>: Select the **checkmark**  to create a default. This will keep the recipient in the **Recipients** list on the right and will send <u>all</u> documents to this recipient.

<u>NOTE</u>: **When selecting defaults, ensure defaulted recipients SHOULD in fact receive every patient note, otherwise defaults should not be set.**



Adding a Favorite Contact to Recipients

- From the **Contacts** list in the left column, hover over the intended recipient and click the **blue + sign** to the right of their name. This moves the contact to the **Recipients** column on the right.



Removing a Favorite or Default Contact

From the **Contacts** list in the left column,

<u>STEP 1</u>: To remove the **favorite**, click the **star**  to diselect.

<u>STEP 2</u>: To remove the **default**, click the **blue checkmark**  to deselect.

<u>NOTE</u>: **Please be sure to exit PowerChart via the Exit Door** 

to save the changes made with favorites/defaults.