Dynamic Documentation Distribution Process Change for Providers and Office Staff
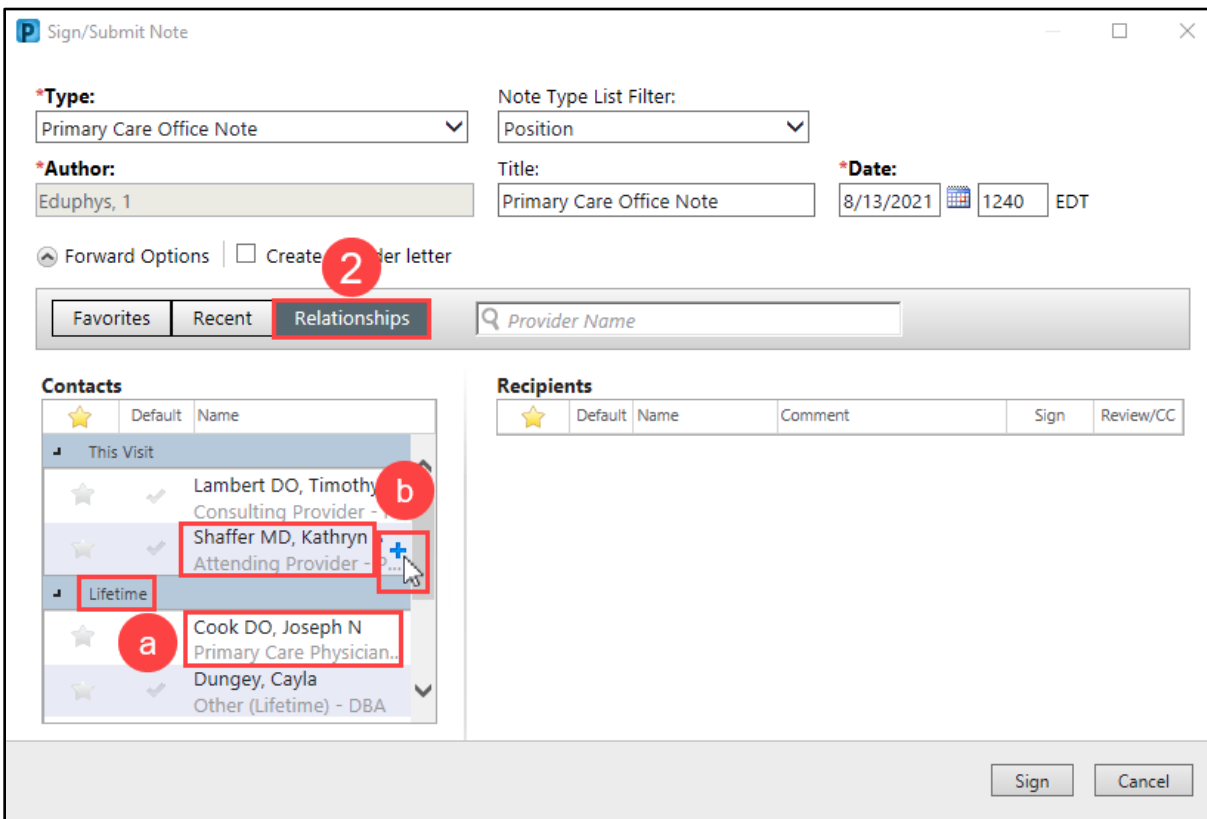
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Forwarding a Note to a Provider:

1. Click Sign/Submit on your Dynamic Documentation, then the Sign/Submit Note window will open.

   (1) [Sign/Submit] [Save] [Save & Close] [Cancel]

2. If a patient has a PCP (Lifetime) your note will automatically be distributed to them.
   a. To confirm the accurate PCP is listed: Click on the Relationships tab.
   b. If you want to send to another provider with an established relationship: Click on the Relationships tab, then click the plus sign next to the provider to add to the Recipient list.
   c. If you want to send to another provider without an established relationship: Proceed to step 3.

3. Search the provider in the search field or use previously set Favorites.
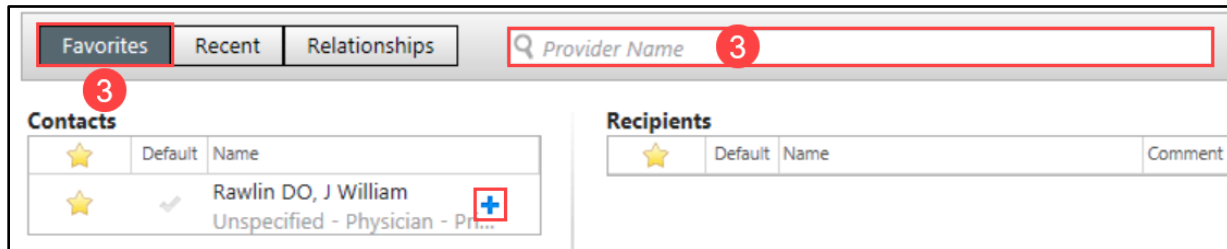

a. If the provider is the only person in the system with that name, pressing Enter will add them to the Recipients list.

b. If there are multiple providers with the same name, select the correct provider from the Provider Selection window, and click OK. This will add them to the Recipients list.

c. If the provider is not searchable or available to select:

    i. Ambulatory setting: Send to **your practice Distribution** recipient and make a comment to which provider the note should be sent to.

    ii. Hospital setting: Send to **MedicalRecords at your facility (see list to the right)**, then make a comment to which provider the note should be sent to. (We recommend that you make this a favorite, see instructions below.)
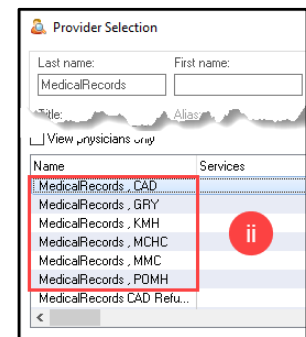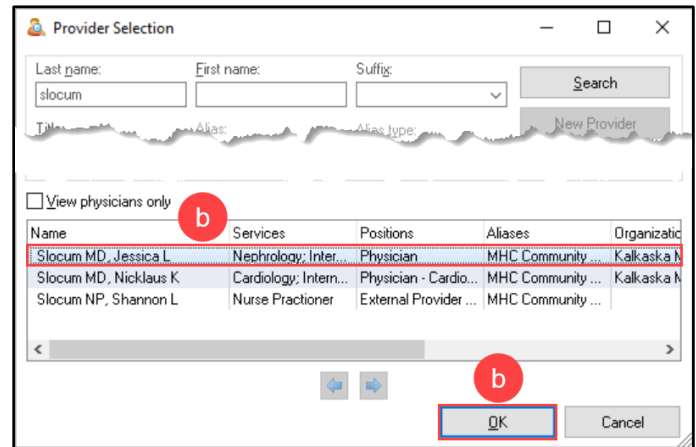
4. View the Recipient provider list for accuracy.

a. If a recipient's co-signature on the note is needed, change the default radio button, Review/CC, to Sign.

5. Click Sign to finish signing and forwarding the note.
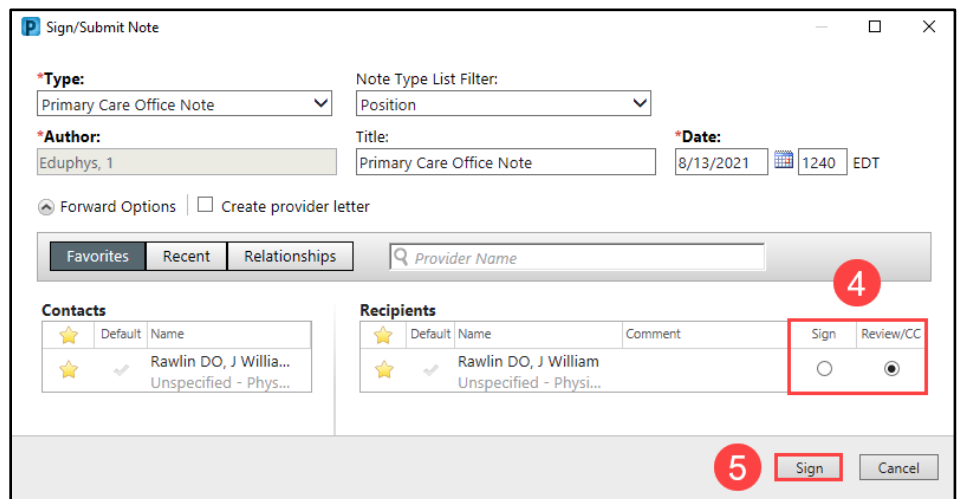
> **Note for ambulatory office staff:** Current monitoring process will remain the same, though the volume will be significantly less.

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Creating Favorite Contacts:

- Once a provider is in the Recipient list, click the star icon. This will add the Recipient to your personal Favorites.

Removing a Recipient from the Forwarding List:

- Once a provider is in the Recipient, click the X next to their name. This will remove the recipient from the list.