

DynDoc Distribution Workflow Cheat Sheet

Note Types Overview

Note Type	Distribution	Important Notes
History and Physical/Specialty Consultation Notes	<p>Telus EHR: Once signed the document automatically goes to the patient's chart in the community if there is an EMR Integrated physician associated.</p> <p>Family Physician: documents are automatically distributed as expected (EMR or paper distribution).</p> <p>Author: Once signed, the author can find the note type in Clinical Notes & Documentation + and in your EMR inbox if integrated.</p> <p>Additional recipients: manually typed in body of document in "copies to" area and manually added on recipients list in subsequent window</p>	<p>TO DO:</p> <p>Step One: At the bottom of the note under "copies to" any additional recipients you want to CC. This step is for record-keeping purposes. Choose "Sign/Submit"</p> <p>Step Two: In the subsequent window, search for any recipient (person or clinic) besides the family doctor, that was listed in the body of the document under "copies to." <u>There is no need to select the family doctor as a recipient as this is done automatically.</u></p> <p>Step Three: Choose "Sign"</p> <p>See below for out-of-province instructions.</p>
Discharge Summary	Same as History and Physical, the author does not receive a discharge summary in their EMR Inbox. This is not automatically included.	Please include self in "copies to" in document and in "recipients" on subsequent page for patient records to be sent to your TELUS inbox. Not distributed. Remains on the patient's chart only.
Progress Notes/Post Discharge Clinic	Not distributed. Remains on the patient's chart only.	Consultation – NFC – provider will follow their current practice distribution. (Same as any consultations currently)

Finalizing Notes

After clicking Sign/Submit:

- A new window opens
- Select recipients using provider name search
- Add favorites using the star icon
- Review note type — it should default correctly (e.g., Progress Note → Physician Progress Note)

Out-of-Province Distribution

- Use “provider name search”
- Try keywords like “IWK” or “Moncton.” Many clinics and physicians can be found this way as they exist in our system.
- If not listed:
 - Search “Extra” in Search bar
 - Select “EXTRA, COPY”

