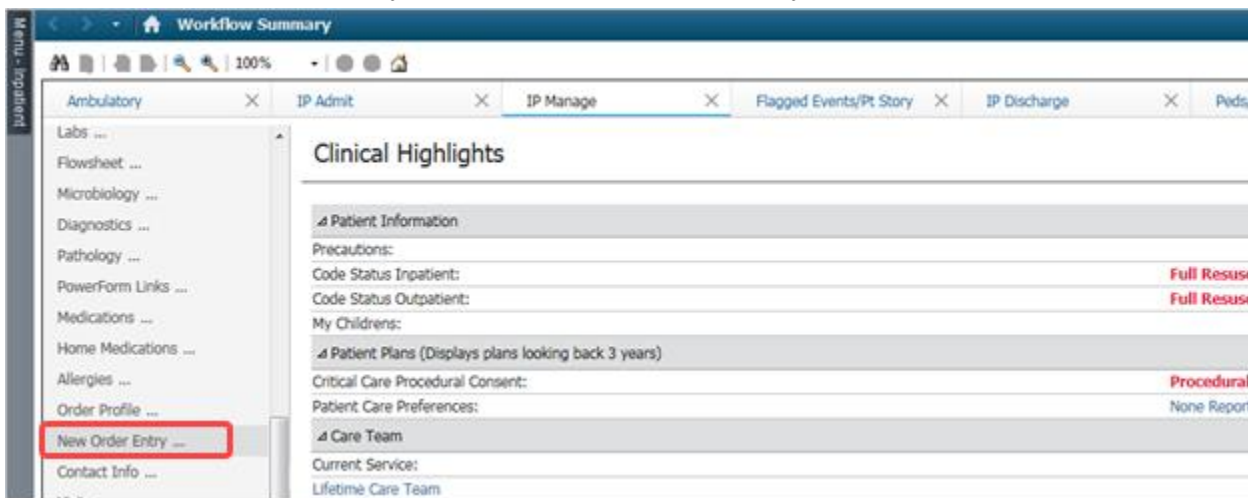# Document Routing Carbon Copies: Direct Charting

This process is for Inpatient History and Physicals, all Consultations, and Narrative Summaries.
Note: This process is not used for Ambulatory Documentation.

Reports created via Direct Charting can pull the primary clinician, referring clinician and the lifetime clinical team into the cc/routing area of the report by using the .cc dotphrase. Cerner will automatically route a final version of the report to these clinicians. If a copy of the report is needed for someone not listed in the routing/cc listing, a carbon copy order needs to be placed, and the report needs to be forwarded to HIM for processing/distribution.

How to send One-time Carbon Copies to HIM for Processing
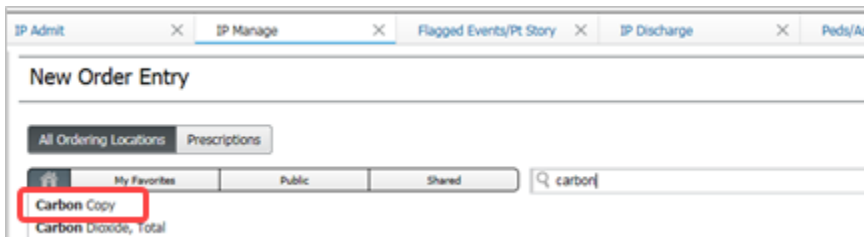
1. On the **Workflow Summary** tab, select **New Order Entry.**

2. The **New Order Entry** page displays. Type **Carbon** in the **Search New Order** field.
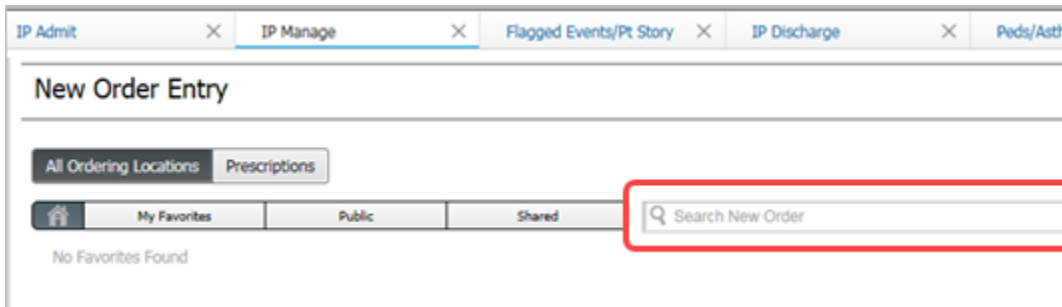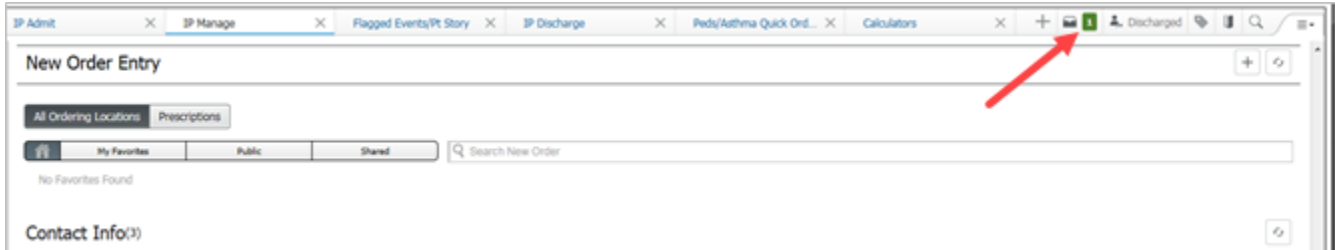

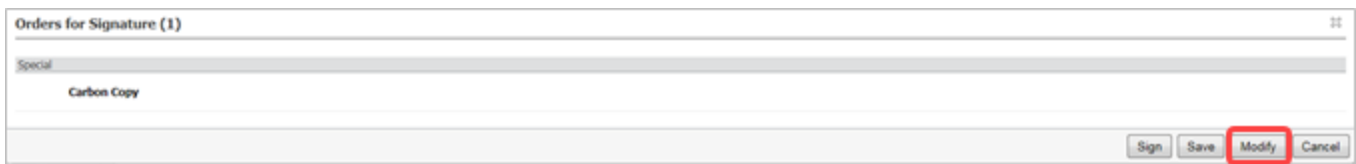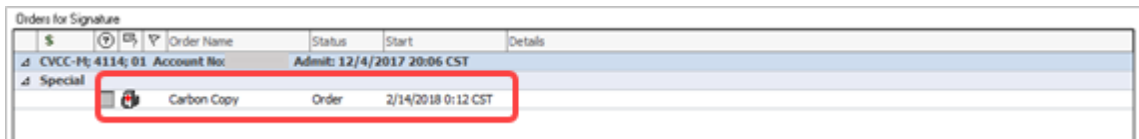3. Select **Carbon Copy** from the **Orders List**.

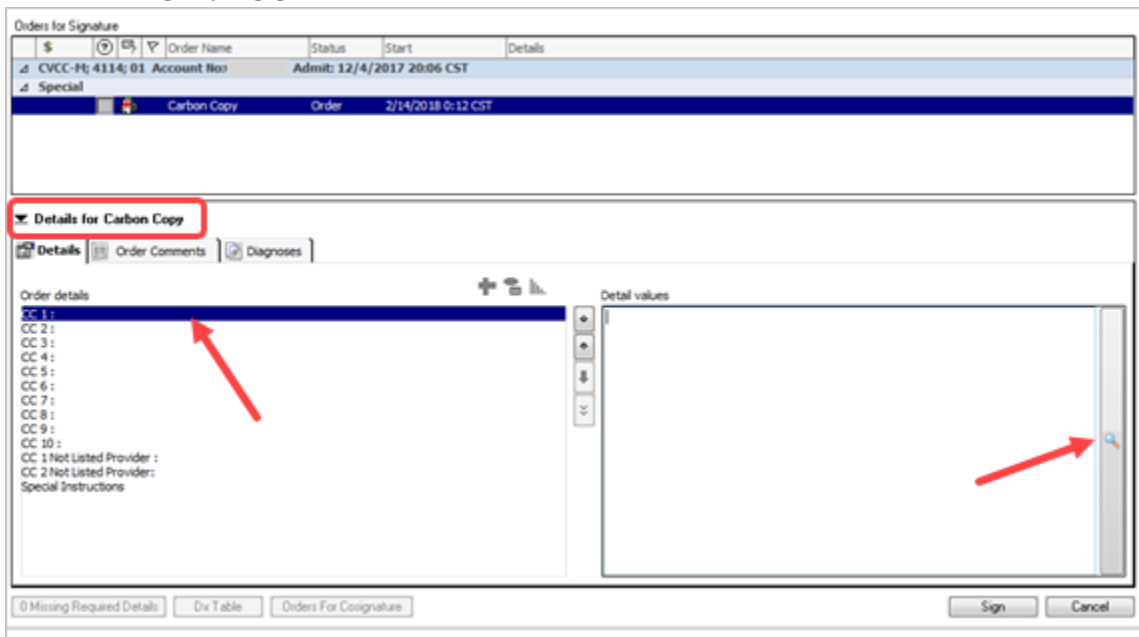4. Click the green icon that displays in the tool bar.

5. The **Orders for Signature** window displays. Select **Modify**.

6. Click **Carbon Copy** to select the order.

7. **Details for Carbon Copy** displays. To add a clinician to receive a copy of a report, highlight **CC1** and click the magnifying glass icon.

8. The **Provider Selection** window displays. Type in a portion of the last and first names in the appropriate fields. Click the **Search** button. All clinicians matching the search criteria will display. Double click on the clinician who should receive a copy of the report. Click **OK**.

Note: if there is a clinician with the same name and it is not clear which to choose, click the **Preview** button to review the clinician's information. Click **Close**.

9. The clinician selected displays in the **CC1: area of the order**.

10. If there are additional clinicians to add, click on the CC# field next in the list, and click on the magnifying glass to locate the clinician. Repeat steps 7-9 until all clinicians are added.

    If you cannot locate a clinician using the search feature, click **CC1 Not Listed Provider**. Provide as many details as possible regarding the recipient such as first name, last name, facility/organization name, city and/or state.

   When all recipients have been added, click **Sign**.

11. Navigate to **Notes** and **Add/Create** a direct charted report (History & Physical, any Consultation, Narrative Summary).
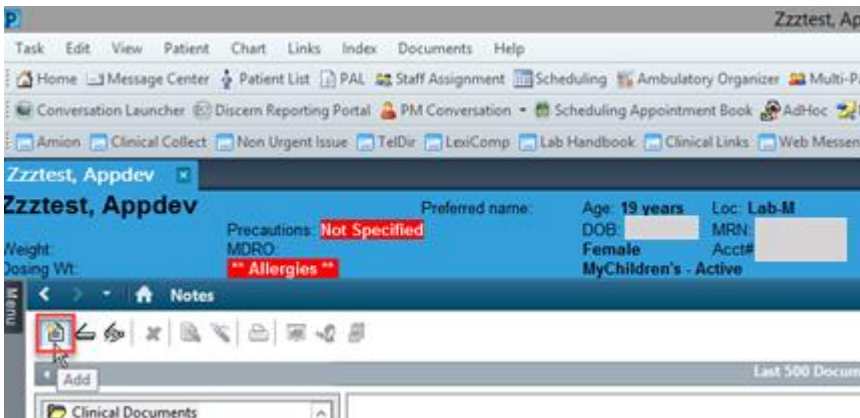
12. At the end of the report, type .cc and click enter. The names of the clinicians who will automatically receive a copy of the report will display. The recipients added will appear with CC: in front of their names.
    Note: Report must be forwarded for those on the CC: list to receive the report. See step 14.
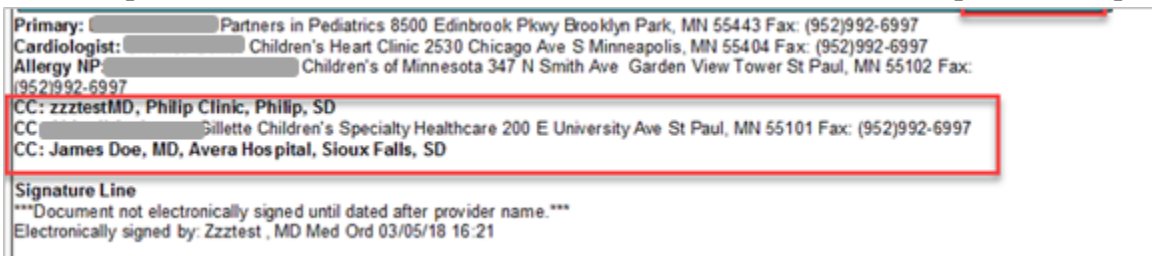
Carbon Copies Displaying in Error:

- **Ordered Carbon Copies:** If there is a recipient displaying in the routing section with **CC:** in front of their name that should not receive the report, click in the Routing section, and delete the recipient's name and information.

- **Primary, Referring or Specialty Carbon Copies (Lifetime Clinical Team):** Do not delete a recipient who has primary, referring, or a specialty in front of their name as this will not stop the report from routing to this recipient. These recipients are managed from the Lifetime Clinical Team tab within Cerner. If there is a clinician who is no longer involved in the patient's care, the clinician should be removed from the Lifetime Clinical Team. Please do not remove clinicians from the Lifetime Clinical Team to prevent a copy from being sent. The organization has endorsed that anyone involved in the patient's care will get a copy of these reports and should remain on the Lifetime Clinical Team Listing.

- **Reminder:** If the report has been started and updates have been made to the Lifetime Clinical Team and/or the ordered CCs, the routing section will need to be updated. To update, highlight the cc section and delete the clinicians listed. Then enter the .cc dotphrase.
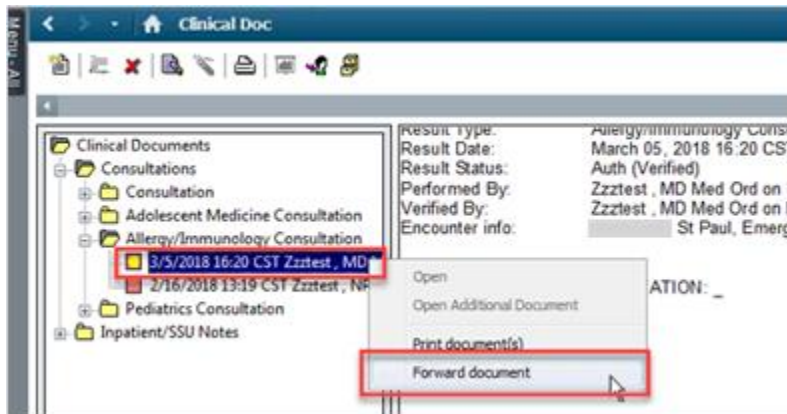
13. When finished with the report, click the **Sign/Submit** button.

If additional carbon copy recipients were ordered, the report must be forwarded to HIM. If the report is not forwarded to HIM, the report will not be sent to the ordered recipients.

If there are no ordered carbon copy recipients, do not send the report to HIM for processing. The system will automatically send the carbon copies.

Forward Report to HIM

1. Locate the report within **Clinical Documents**. Double click on the document to select it, right click, and select **Forward Document**.

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2. A **Forward Only Documents** window will display. In the drop down, select **Review.** In the To: field type **Carbon**. Click on the binocular icon and the Carbon Copy (One Time), HIM inbox will be selected.

Additional CC recipients display here

3. Click the **OK** button when done. HIM will send the carbon copy to the recipients.

Addendum Process for Carbon Copies: When completing an addendum, the Lifetime Clinical Team will automatically receive a revised copy of the report. For the manually ordered cc recipients to receive a revised copy, the report must be forwarded to Carbon Copy (One Time), HIM Inbox for processing/distribution.