

Document Routing: Dynamic Doc Carbon Copies

Routing Carbon Copies: Dynamic Documentation

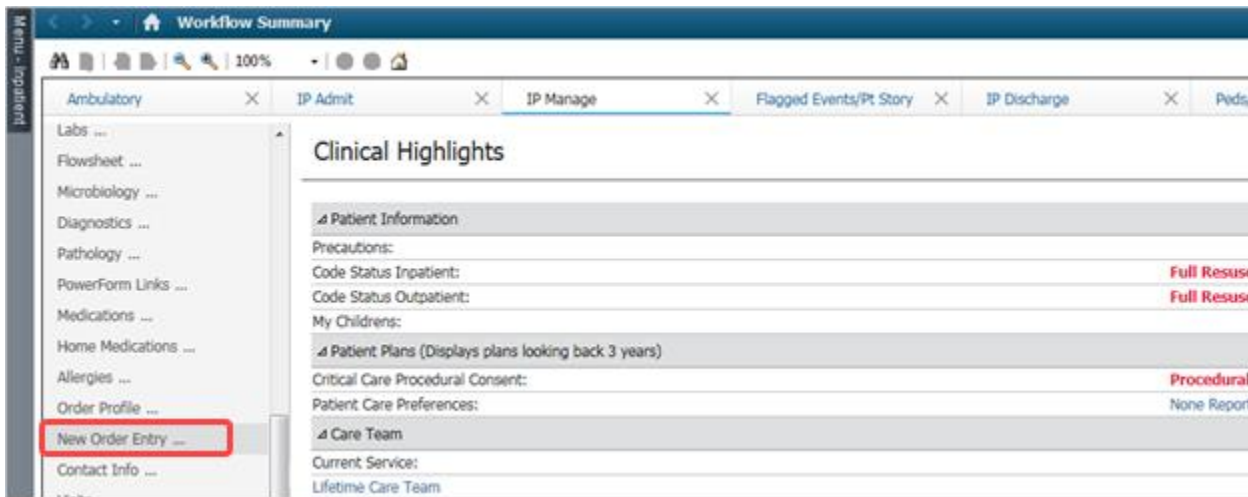
This process is for Inpatient History and Physicals, all Consultations, and Narrative Summaries.

Note: This process is not used for Ambulatory Documentation.

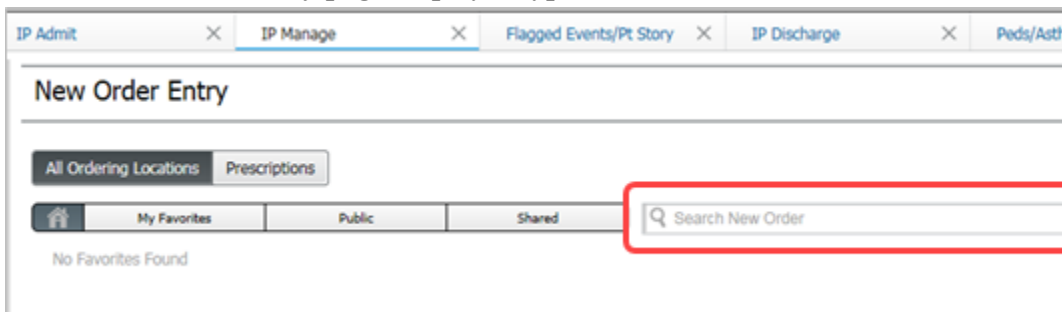
Reports created via Dynamic Documentation will have the routing/carbon copy (cc) auto populate with the primary clinician, referring clinician and the lifetime clinical team. Cerner will automatically route a final version of the report to these clinicians. If a copy of the report is needed for someone not listed in the routing/cc listing, a carbon copy order needs to be placed, and the report forwarded to HIM for processing/distribution.

How to send One-time Carbon Copies to HIM for Processing

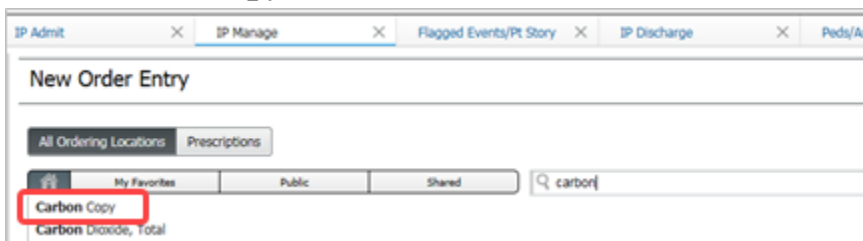
1. On the **Workflow Summary** tab, select **New Order Entry**.



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

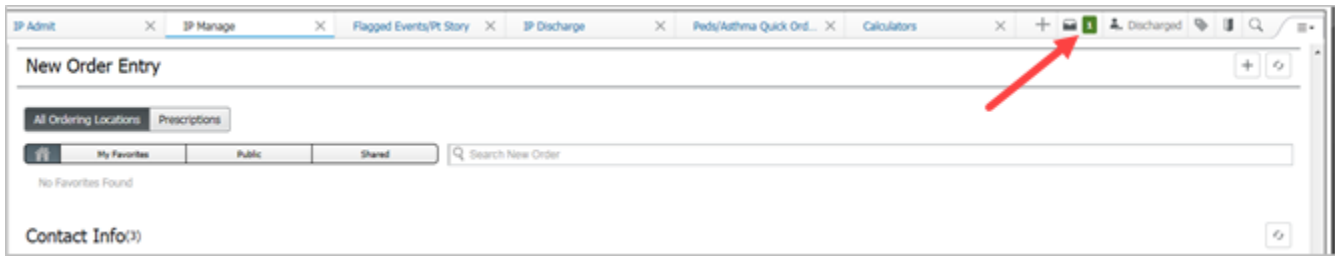


3. Select **Carbon Copy** from the **Orders List**.

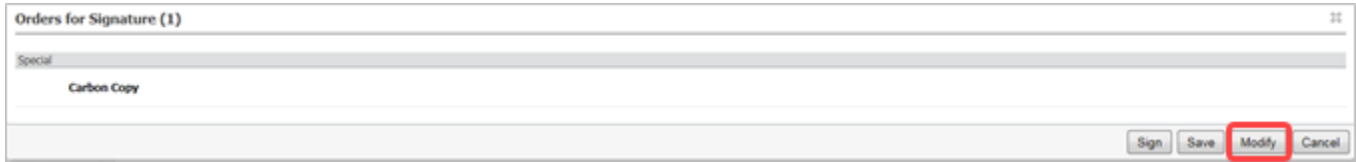


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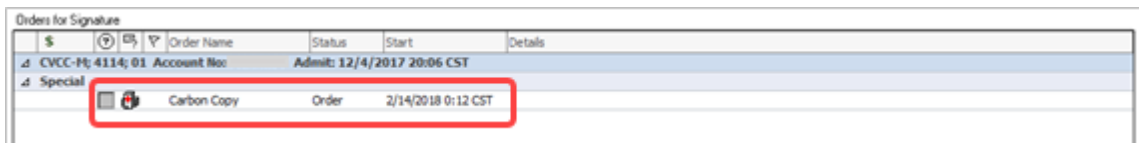
4. Click the green icon that displays in the tool bar.



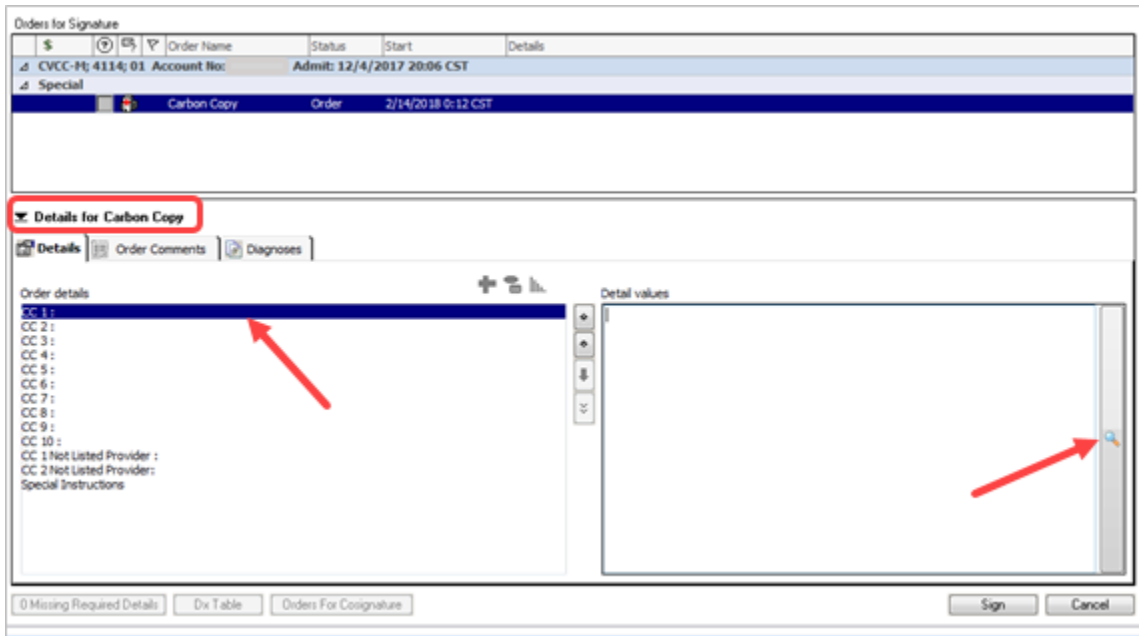
5. The **Orders for Signature** window displays. Select **Modify**.



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.



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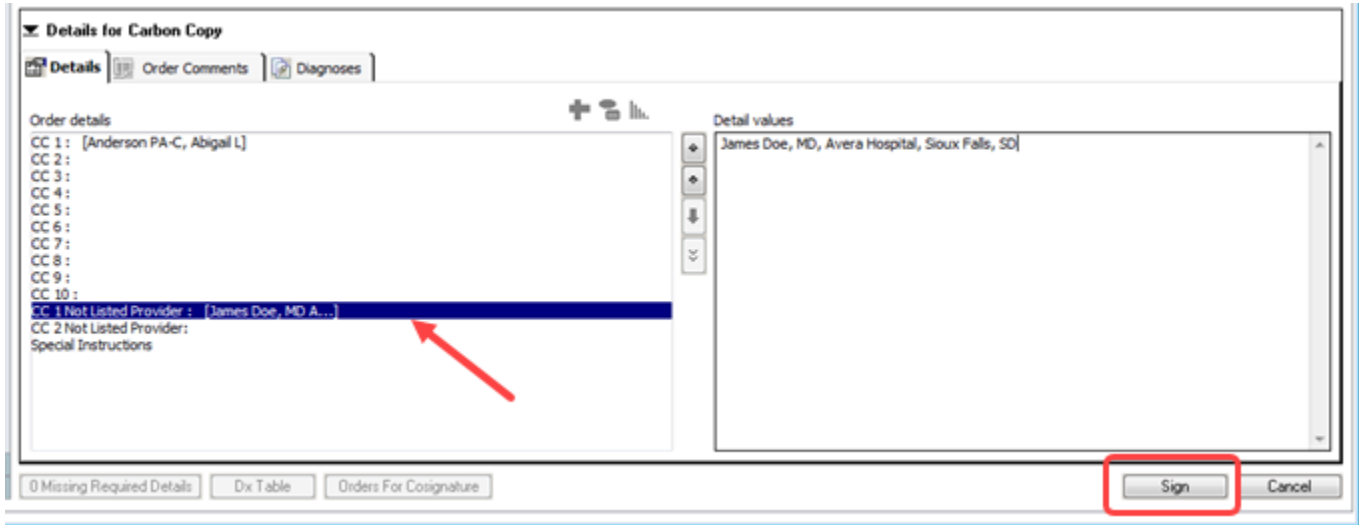
8. The **Provider Selection** window displays. Type in a portion of the last and first names in the appropriate fields. Click the **Search** button. All clinicians matching the search criteria will display. Double click on the clinician who should receive a copy of the report. Click **OK**.

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**.

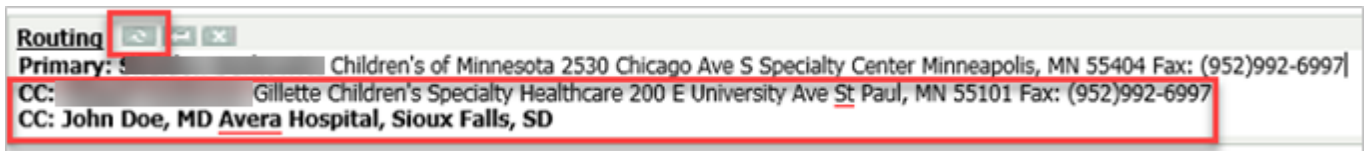
9. The clinician selected displays in the **CC1: area of the order**.

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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**.

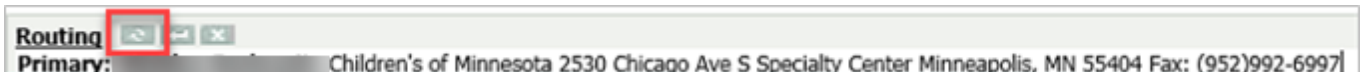


11. When completing the report, confirm the carbon copy recipients that were ordered are added to the **Routing** section of the report. Note the recipients added will appear with CC: in front of their names. If the ordered carbon copies do not appear, click the refresh button.



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 refreshed.



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12. When finished with the report, click **Sign/Submit**.

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.

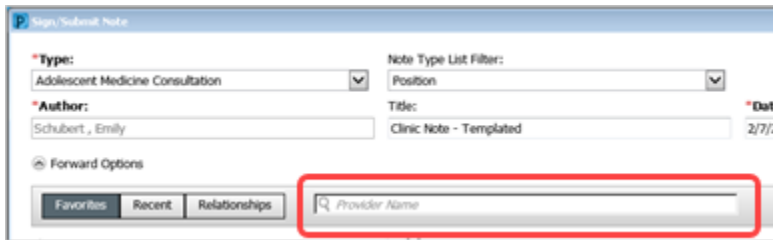
If there are no ordered carbon copy recipients, do not send the report to HIM for processing. The system will automatically send the carbon copies.

Forward report to HIM

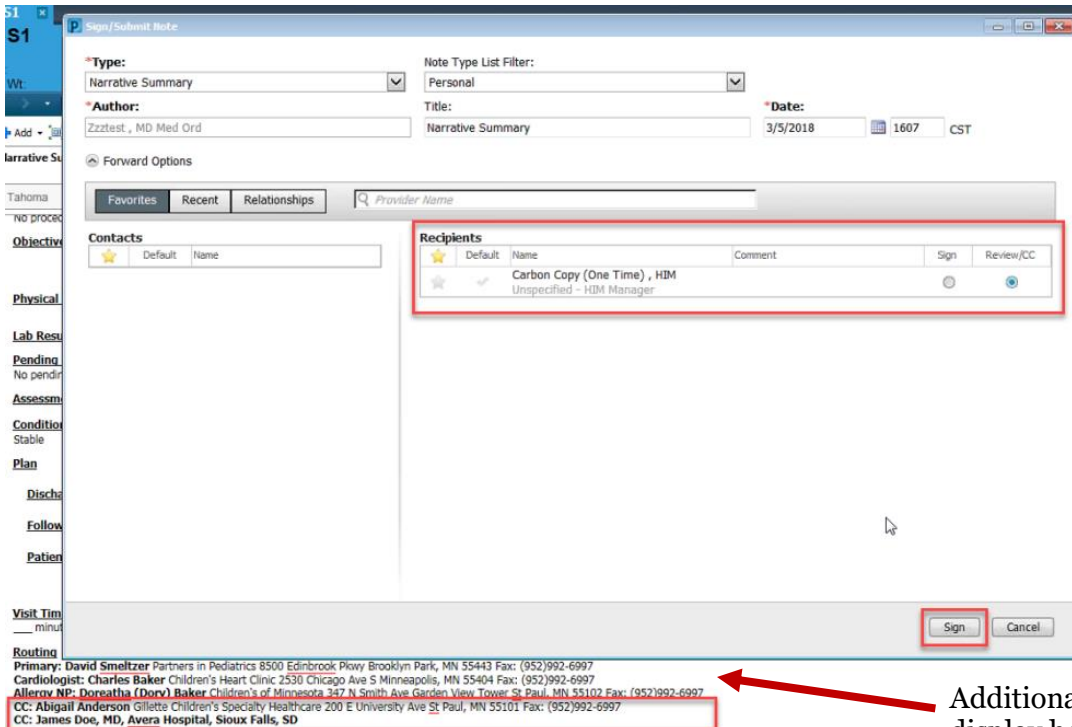
Because additional carbon copy recipients were ordered, the report must be forwarded to HIM for processing by following these steps:

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

1. In the **Provider Name Search** field, type **Carbon**.



2. The Carbon Copy (One Time), HIM recipient will automatically populate in the **Recipients** list and the radio button will display as **Review/CC**.

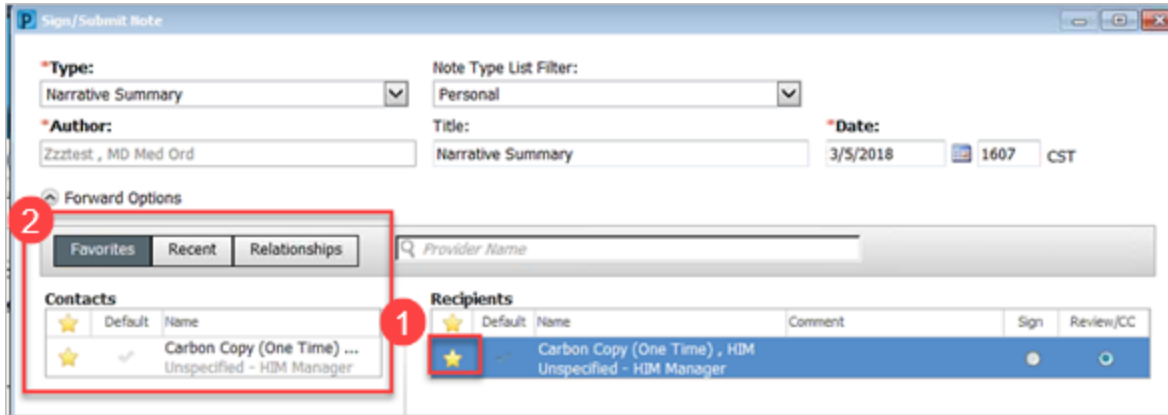


3. Click **Sign** to complete the note.

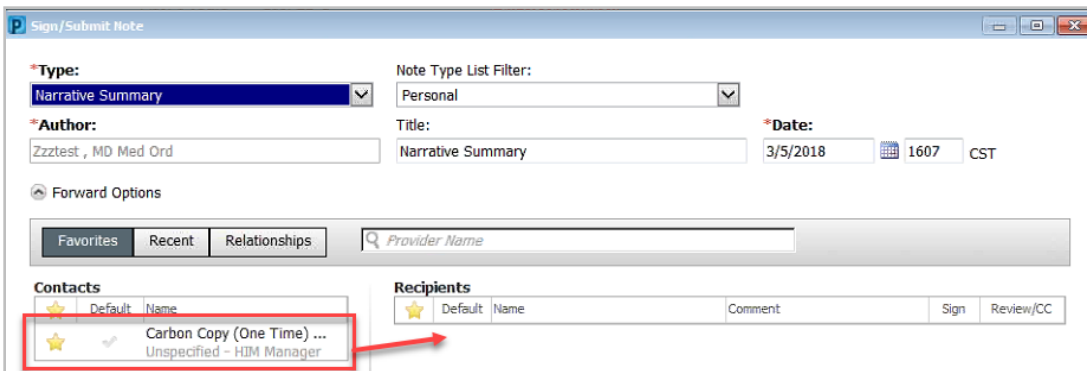
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How to add the Carbon Copy (One Time), HIM as a Favorite:

1. Click the Star icon next to **Carbon Copy (One Time), HIM**.
2. **Carbon Copy (One Time), HIM** will now appear under the **Contacts** section for future use.



To utilize the **Carbon Copy (One Time), HIM** recipient after making it a favorite, double click on the **Carbon Copy (One Time), HIM** name within the **Contacts** section and it will move to the **Recipients** list on the right.



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.