

Document Routing Carbon Copies: Dynamic Documentation

This process is for Inpatient documents (History and Physical, all Consultations, and Narrative Summary). **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.

< 🔿 👻 🛖 Workflow Su	< > 👻 🚖 Workflow Summary								
Ambulat × IP Manage × Develop × IP Admit × Anesthesia × Cardiolo × Cardiolo × NeuroSu									
¥	Labs Grouping								
Measurements/Growth Chart	No Results Found								
Allergies Order Profile	No Results Found								
New Order Entry	Microbiology (0)								
DME Orders Contact Info	No Results Found								

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

New Order Entry								
i Information. The s	ystem is still pro	ce	ssing health pla	ans. Retry in a few	/ seconds.			
All Ordering Locations	Prescriptions		carbon					XQ
🕇 Home	My Favori	te	5	Public		Shared	Search Results	
Top 27 Matches								

3. Select Carbon Copy from the Orders List.

New Order Entry											
Information. The system is still processing health plans. Retry in a few seconds.											
All Ordering Locations Prescriptions carbon											
A Home	My Favorites	Public		Shared							
Top 27 Matches											
Carbon Copy			☆	calcium carbon ate 500							
Carbon Dioxide, Tot	al		☆	calcium CARbonate-vit							
Carbon Monoxide L	evel		☆	calcium CARbon ate-vit Give 1 TARLET PO							

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



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

Orders for Signature	×
List View Association View	
▼ Special (1)	
∰ Carbon Copy	Remove
	Sign Save Modify Details Cancel

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.

((or Signature	
ÌГ	Image: Image	
	m/Onc CI-M Accts2146567 Admit: 1/19/2024 12:54 CST	
	ecial	
	🔲 💕 Carbon Copy Under 8/20/20/4 889 CDI	
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	Not Listed Provider.	
	al Instructions	
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	Sign Cance	



Document Routing: Dynamic Doc Carbon Copies

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**.

Provider Selection Last name:	First name:	Sulfix	Search	Note: If there i name and it is r	is a clinician with the same not clear who to choose, click utton to review the clinician
Ander Title:	Alias:	Alias type:	New Provider Preview	information. Cl	ick Close .
Usemame:			Clear	to Provider Info	
Limit by group	9	No data filtering		Item	Value
Limit by organizatio	m 💡	Filtered: Children's I	linneapolis	Name Username Physician	Yes
Limit by position	•	No data filtering		Alializa Comm Dr. Nbr Doc DEA Nbr	
View physicians only Name	<i>y</i>	Organization	Services Alias Psychology Com Orthopedic SurgerCom Physician Assistant Com Family Psectice Com	Dictaphone Provider Number Phone Business Fax Business	
			Family Practice Com	Address business E-mail	Gillette Children's Specialty Healthcare 200 E University Ave Pediatric Orthopedics St Paul, MN 55101
۲	"	• •	0K Cancel	< [m ,

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

Orders for Signature				
\$ 🕜 🖳 Ϋ Order Name	Status Start	Details		
△ Hem/Onc CI-M Acct:52146567 Admit: 1/19/2	2024 12:54 CST			
⊿ Special				
Carbon Copy	Order 8/20/2024 8:49 CDT	CC 1 : Lander MD, Timothy		
Details for Carbon Copy				
Totalis Order Comments Diagnose	15			
Order datalla			+ 2 1	Detailuelue
OC1 Upder MD Timethyl				Detail values
CC 2:			*	Lander MD, Timothy
CC 3:			*	
CC 4:			4	
CC 6:				
CC 7:			*	
CC8:				
CC 10 :				
CC 1 Not Listed Provider :	-			
Special Instructions				
				1

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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.

▼ Details for Carbon Copy		
Details III Order Comments I Diagnoses		
Order details CC 1: [Anderson PA-C, Abigal L] CC 2: CC 3:	Detail values Image: Detail values Image: Detail values Image: Detail values	*
CC 4: CC 5: CC 6: CC 7: CC 8:	· · · · · · · · · · · · · · · · · · ·	
CC 9 : CC 10 : SC 1Not Listed Provider : [James Doe, MD A] CC 2 Not Listed Provider:		
Special instructions		
		~
0 Missing Required Details Dx Table Orders For Cosignature	Sign	Cancel

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

Routing S	3	
Primary: 5	Children's of Minnesota 2530 Chicago Ave S Specialty Center Minneapolis, MN 55404 Fax: (952)992-6997	
CC:	Gillette Children's Specialty Healthcare 200 E University Ave St Paul, MN 55101 Fax: (952)992-6997	
CC: John Doe, MD	Avera Hospital, Sioux Falls, SD	_

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.

Routing		
Primary:	Children's of Minnesota 2530 Chicago Ave S Specialty Center Minneapolis, MN 55404 Fax: (952)992-6997	

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



Forward Report to HIM

If additional carbon copy recipients were ordered, the report must be forwarded to HIM for processing. Follow the steps below.

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.

P Sign/Submit Note				
Туре:		Note Type List Filter:		
Adolescent Medicine Consultation	~	Position	~	
*Author:		Title:		*Date
Schubert , Emily		Clinic Note - Templated		2/7/2
Forward Options				
Favorites Recent Relationships	Q Provide	r Name		

2. Select the **Carbon Copy (One Time)**, **HIM** recipient from the provider selection window. Ensure the **Review/CC** radio button is selected.

51 × .							¥	
S1	P Sign/Submit flote							
	*Type:		Note Type List Filter:					
vVt.	Narrative Summary	~	Personal					
2 *	*Author:	-	Title:	*Date:				
Add + 🗐	Zzztest , MD Med Ord		Narrative Summary	3/5/2018	1607	CST	r 🔽	
larrative Su	S Forward Options						_	
Tahoma	Favorites Recent Relationships Q Pro	rvide	er Name					
Objective	Contacts		Recipients					
Objective	🖕 Default Name		👷 Default Name Con	ment		Sign	Review/CC	
			Carbon Copy (One Time) , HIM			0	۲	
Physical			Unspecified - rum manager-					
Lab Resu		1						
Pending								
No pendir								
Assessm								
Condition Stable		ľ						
Plan								
Discha								
Follow					R			
Pation								
ration								
Visit Tim					-			
minut						Sign	Cancel	
Routing							_	
Cardiologi	David Smeitzer Partners in Pediatrics 8500 Edinbrook Pikwy Broo ist: Charles Baker Children's Heart Clinic 2530 Chicago Ave S Mi	innea	Park, MN 55443 Fax: (952)992-6997 apolis, MN 55404 Fax: (952)992-6997					
Allergy NE CC: Abigai	P: Doreatha (Dorv) Baker Children's of Minnesota 347 N Smith il Anderson Gillette Children's Specialty Healthcare 200 E University	Ave sity A	Garden View Tower St Paul, MN 55102 Fax: (952)992-6997 we St Paul, MN 55101 Fax: (952)992-6997				Addition	nal co rocinionte dienla
CC: James	s Doe, MD, Avera Hospital, Sioux Falls, SD					-	Audition	nai ce recipients display
							here.	

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



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 display under the Contacts section for future use.

*Type:		Note Type List Filter:	
Narrative Summary	~	Personal	
Author:		Title: "Date:	
Zzztest MD Med Ord		Narrative Summary 3/5/2018	1607 CST
Forward Options Fovorites Recent Relationships] বি	Provider Name	
Forward Options Fovorites Recent Relationships Contacts] []	Provider Name Recipients	
Forward Options Forward Options Forward Contacts Default Name] R	Provider Name Recipients Comment	Sign Review/CG

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.

Туре:		Note Type List Filter:	8.2			
Narrative Summary	~	Personal	~			
Author:		Title:		*Date:		
2zztest , MD Med Ord Forward Options		Narrative Summary		3/5/2018	1607	CST
] []	Narrative Summary Provider Name Recipients		3/5/2018	1607	CST

Addendum Process for Carbon Copies: When completing an addendum, the primary provider, referring provider, and 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 the Carbon Copy (One Time), HIM Inbox for processing/distribution.