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The CCD Reconciliation Worklist Report looks at patients scheduled for ambulatory appointments within a given timeframe and whether the Continuing Care Documents (CCD) have been preloaded. The report provides insight into the chart prep and reconciliation progress of patients with upcoming appointments.

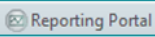
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### Opening the Reporting Portal

The Reporting Portal can be accessed from within PowerChart and FirstNet. It is also available in the AppBar, which is used by certain office staff, nursing, and leadership personnel.

#### ➤ PowerChart & FirstNet

**STEP 1:** Sign into **PowerChart** or **FirstNet**.

**STEP 2:** Find and click **Reporting Portal**  in the toolbar at the top of the window.

**STEP 3:** Enter **Username** and **Password** at the prompt.


#### ➤ AppBar

**STEP 1:** Sign into **AppBar**.

**STEP 2:** Find and click **Reporting Portal**.



**NOTE:** If the Reporting Portal button is not already on the AppBar, follow these steps to add it:

1. Click the AppBar  button.
2. Select **Customize**.
3. Click to select the **Buttons** tab.
4. Place a checkmark beside **Discern Reporting Portal**.
5. Click **OK**.


### Finding and Running the Report for the First Time

#### ➤ Finding the CCD Reconciliation Worklist Report

**STEP 1:** In the **Filters** column under **Categories**, select **Provider/Orders** checkbox.

**STEP 2:** Scroll to find and click one time on the **CCD Reconciliation Worklist Report**.

**NOTE:** Search field in the upper right can be used to search CCD Reconciliation Worklist Report instead of scrolling.

**STEP 3:** Select the star icon  to the right to save this report to **Favorites**. The star will become yellow, and the report will be listed in the **My Favorites** tab.

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## ➤ Running the CCD Reconciliation Worklist Report

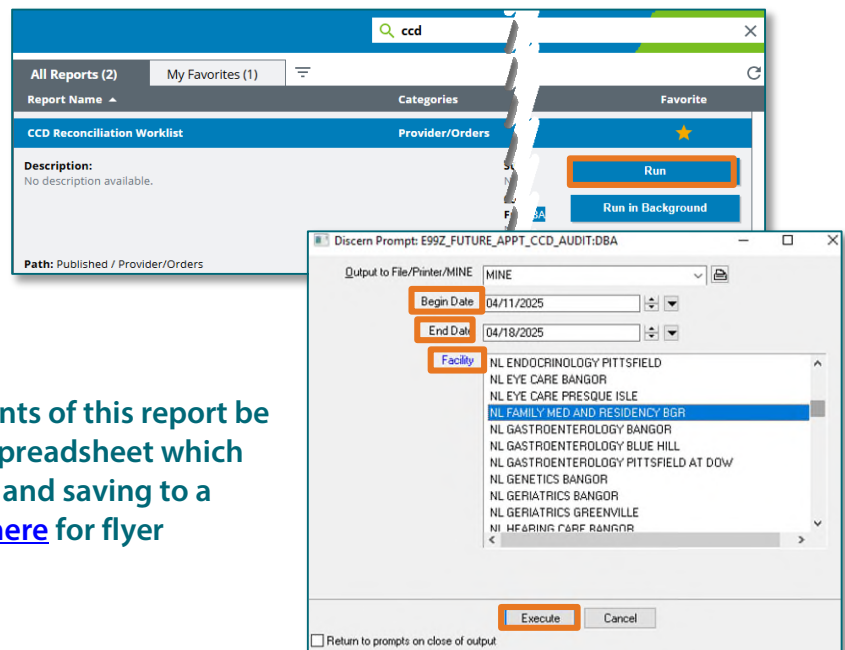
**STEP 1:** Click Run.

**STEP 2:** Follow the prompts in the **Prompt Screen** as applicable to practice by selecting:

- **Begin/End dates**
- **Facility**

**STEP 3:** Click Execute.

**NOTE:** It is recommended that the contents of this report be copied and pasted into an excel spreadsheet which allows for better filtering options and saving to a local desktop or file folder. Click [here](#) for flyer assistance.



## Reading the Report

Patients with scheduled appointments at the selected practice(s) are listed in the report with **Medical Record Number (MRN)**, **Facility**, **Appointment Date and Time**, and **Resource (Provider Name)**.

Run Date	MRN	Patient Name	Facility	Facility Short Name	Next Appt Date	Resource	Percent Reconciled
1990 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			88.51
1991 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			91.67
1992 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			89.19
1993 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			28.57
1994 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			100.00
1995 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			76.60
1996 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			99.00
1997 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			87.82
1998 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			44.93
1999 04/11/25 10:04:00			NL Family Medicine Center and Residency Bangor	FPL_E			100.00

- The rightmost column in the report displays the state of **CCD reconciliation** for each patient as a percentage (%).
  - Given the complexity of the reconciliation process, the percent complete should be considered informational.
  - The higher the percentage, the more complete the reconciliation process is in the patient's chart.
- The reads live data. Click the **Refresh** button to update the data. This may be a helpful feature for monitoring progress.



For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket](#) to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.