
Providers have the ability to default CC recipients for notes; however, default CC's are easy to accidentally select and in turn will send all notes the defaulted recipient when it may not be appropriate. In an effort to mitigate unauthorized disclosure of PHI, this reviews how practice management will run a report to monitor and ensure providers are appropriately CC'ing documents to recipients.

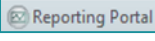
Default CC's should only be used by users in which any and all notes need to go to that recipient upon signature. Typical scenarios include an NP/PA needing co-signature by their attending on all notes or a scribe working with the same provider in which all notes need co-sign. Physicians should never default CC's selected.

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 DynDoc Default CC Report

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

STEP 2: Scroll to find and click one time on the **DynDoc Default CC Report**.

NOTE: Search field in the upper right can be used to search DynDoc Default CC Report instead of scrolling.

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

➤ Running the DynDoc Default CC Report

STEP 1: Click **Run**.

STEP 2: 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.

Exporting to Excel

The report will output in a .csv format. Quickly and easily export to an excel spreadsheet for better filtering options.

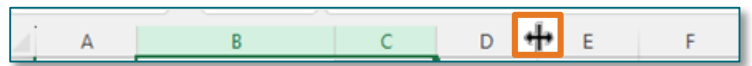
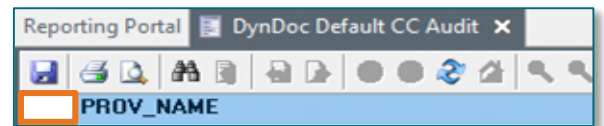
STEP 1: Select the blank square in the top left of the spreadsheet.

- This will highlight the entire report.

STEP 2: Use **Ctrl** and **C** to copy the data.

STEP 3: Open a new Excel spreadsheet document and use **Ctrl** and **V** to paste the data in the new spreadsheet.

STEP 4: Expand columns by hovering between each column and double-clicking when the expand icon appears.



Reading the Report

In the newly created Excel spreadsheet, column B (Prov_Name) and column D (Prov_Loc) are NLH providers and their practice/hospital location. Column H (PCV-Prov) and column I (PVC_Prov_Loc) are the names/locations of the providers that have been default CC'd.

Verify providers/staff on the report from column B and/or column D for the following scenarios, NP/PA needing co-signature by their attending on all notes or a scribe working with the same provider in which all notes need co-sign. Physicians should never default CC's selected.

If not, communicate to the provider/staff to remove the default CC. Instructions on how to do this found [here](#).

NOTE: Follow appropriate compliance policy for reporting any unauthorized PHI disclosures.