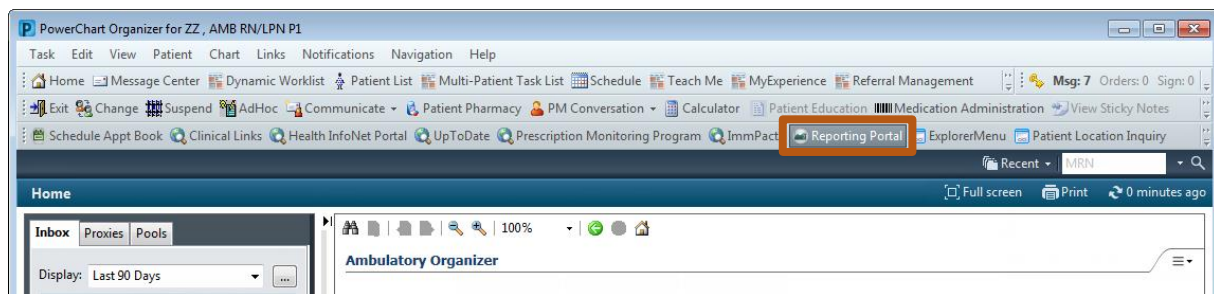The CCD Reconciliation Worklist Report looks at patients scheduled in for appointments within a given timeframe and whether the Continuing Care Documents (CCD) have been preloaded. This report provides insight into the chart prep and reconciliation progress of patients with upcoming appointments.

Reporting Portal in the Links Tool Bar

The report is found on the **Reporting Portal**. The portal is accessed via the PowerChart/FirstNet **Links** tool bar. This is the tool bar that contains links to the **Schedule Appt Book**, **Clinical Links**, **UpToDate**, among others. Depending on the end user's personal preferences, this button may or may not be hidden in the tool bar dropdown, on the right.

Links Tool Bar:

Using the Links Tool Bar Dropdown:
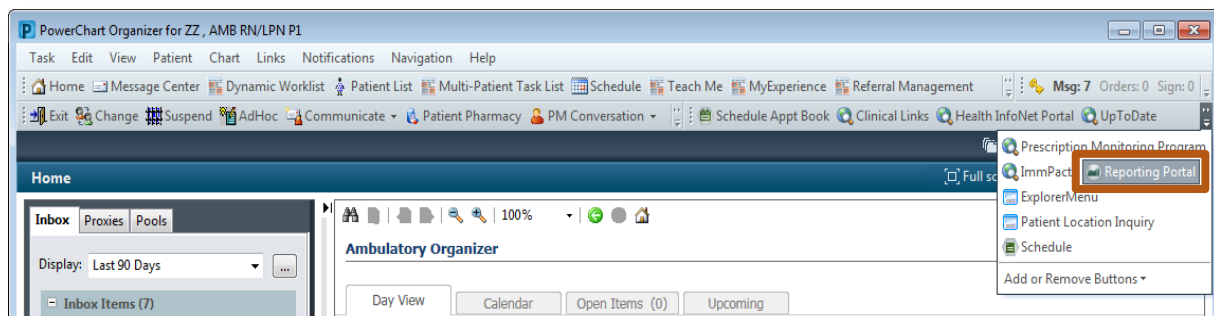
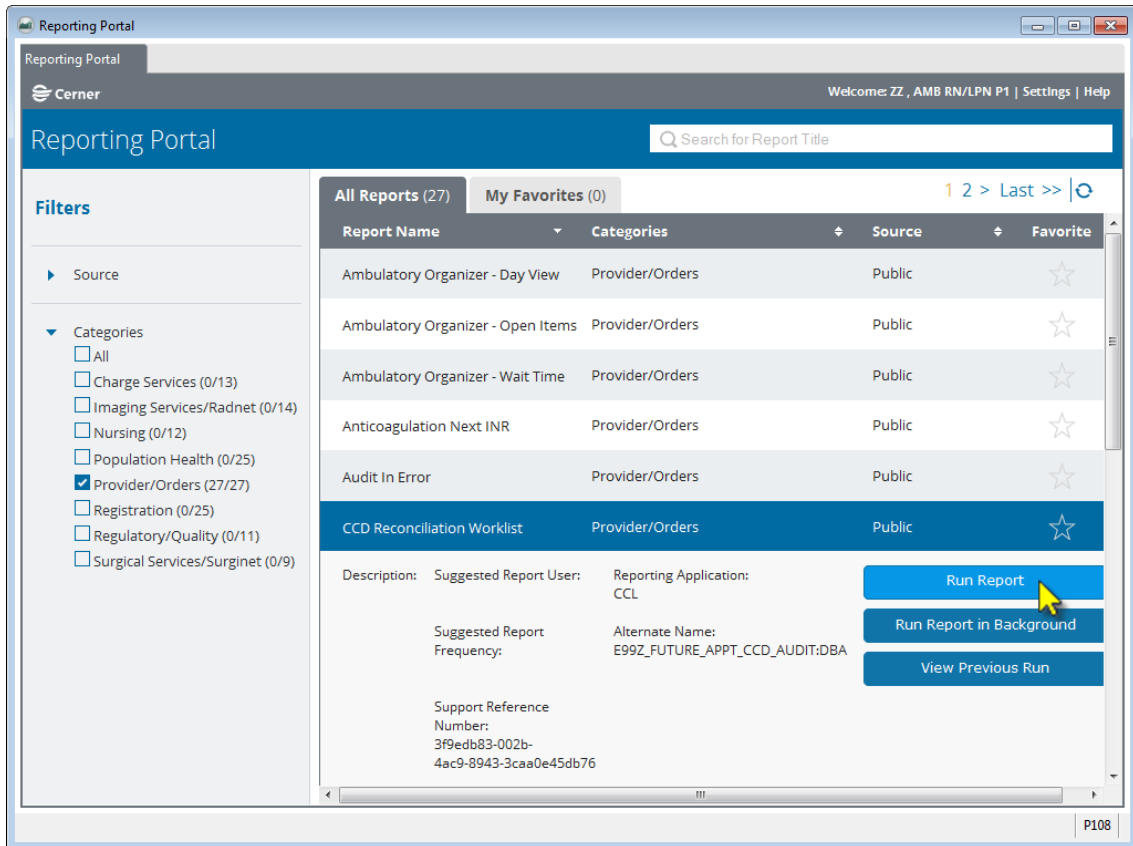## Locating the CCD Reconciliation Worklist Report

STEP 1: Sign-in to the **Reporting Portal** using the same username and password used to access PowerChart/FirstNet.

STEP 2: If prompted, choose the correct facility in the **Select Organizations** window. (To be prompted for this information each time, place a checkmark in the box beside "**Ask on startup**."
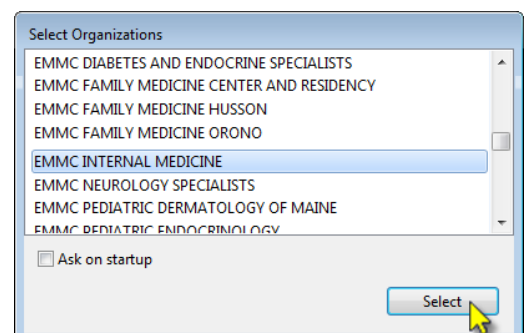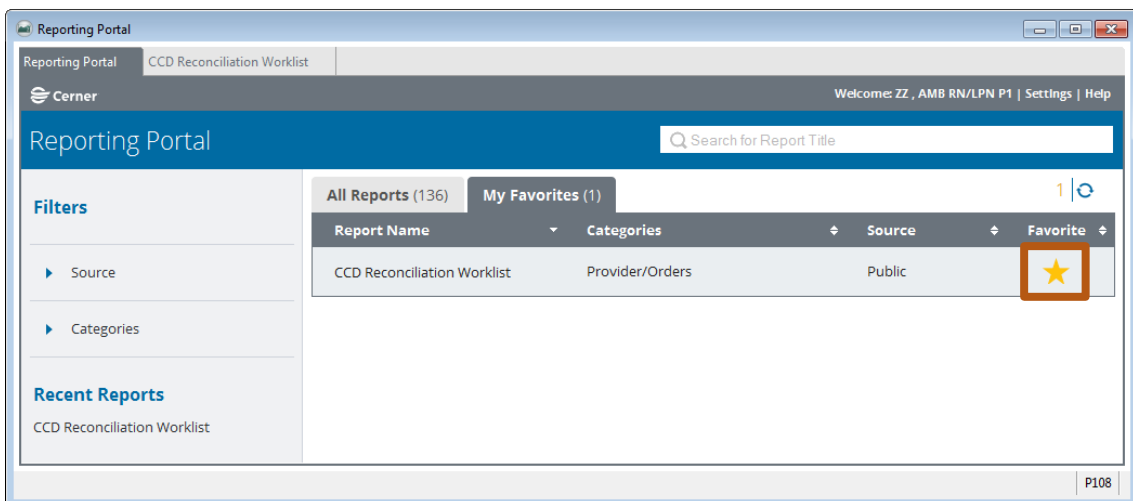
STEP 3: Click the **expand** icon beside **Categories** (on the left) and select **Provider/Orders.**

STEP 4: Click **CCD Reconciliation Worklist** in the results on the right. The report options will expand.

HINT: If desired, click the **Star** icon to add the report to the **My Favorites** tab.

Running the CCD Reconciliation Worklist Report

STEP 1:   Click the **Run Reports** button.

STEP 2:   Enter the report criteria.

- **Output to File/Printer/MINE:** Choose the desired output.

  o   Leave set to **MINE** to optimize the print output before saving to file or printing.

  o   This is the recommended option.

- **Begin Date & End Date:** Defaults to the next 7 days; adjust as needed.

- **Facility:** Select the location.
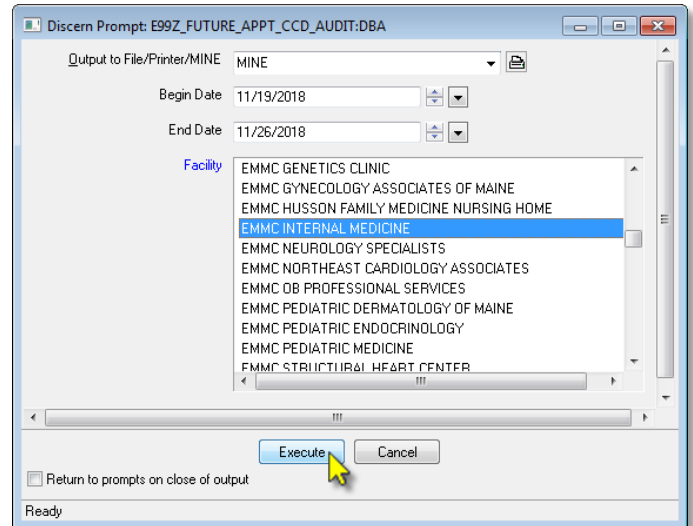
STEP 3:   Click the **Execute** button. The report will display in a preview window.
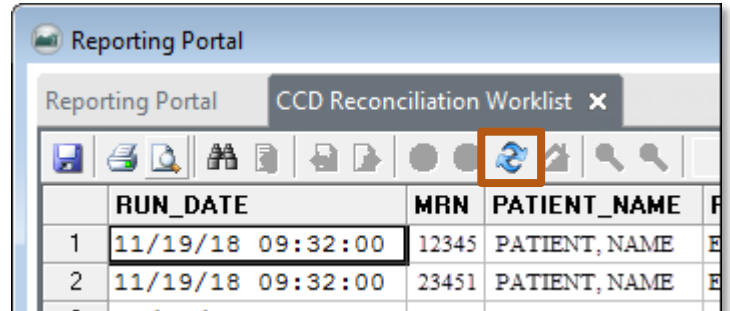
Reading the Report

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 **Provider Name**.

	RUN_DATE	MRN	PATIENT_NAME	FACILITY	FACILITY_	NEXT_APPTMT_DATE	RESOURCE	PERCENT_RECONCILED
1	11/19/18 09:32:00	12345	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 07:10:00	EXAMPLE MD	100.00
2	11/19/18 09:32:00	23451	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 07:40:00	EXAMPLE, PA	73.81
3	11/19/18 09:32:00	34512	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 07:50:00	EXAMPLE, DO	89.47
4	11/19/18 09:32:00	45123	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 07:50:00	EXAMPLE, FNP	95.45
5	11/19/18 09:32:00	12345	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:20:00	EXAMPLE MD	96.77
6	11/19/18 09:32:00	23451	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:20:00	EXAMPLE, PA	49.12
7	11/19/18 09:32:00	34512	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:40:00	EXAMPLE, DO	59.38
8	11/19/18 09:32:00	45123	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:40:00	EXAMPLE, FNP	93.33
9	11/19/18 09:32:00	12345	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:40:00	EXAMPLE MD	48.48
10	11/19/18 09:32:00	23451	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 08:50:00	EXAMPLE, PA	83.54
11	11/19/18 09:32:00	34512	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 09:00:00	EXAMPLE, DO	0.00
12	11/19/18 09:32:00	45123	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 09:10:00	EXAMPLE, FNP	100.00
13	11/19/18 09:32:00	12345	PATIENT, NAME	EMMC Internal Medicine	HIMS_E	11/19/18 09:10:00	EXAMPLE MD	96.67

- The rightmost column in the report displays the state of **CCD reconciliation** for each patient as a percentage (%).

  o   Given the complexity of the reconciliation process, the perent complete should be considered informational.

- o The higher the percentage, the more complete the reconciliation process is in the patient's chart.

- The report reads live data. Click the **Refresh** button to update the data. This may be a helpful feature, for monitoring progress.

Saving/Printing the Report (Optional)

The following steps can be used to optimize the printed and/or saved file output.

STEP 1:   Use click and drag to adjust the column widths, as desired.

STEP 2:   Click the **Print Preview** button in the menu. The Print Preview window will open.

- Click **Page Setup**.
    - o **Orientation: Landscape** is recommended.
    - o **Margins**: Adjust, as desired.

STEP 3:   Use click and drag to adjust the column widths, as desired.

HINT: **To get all of the columns on a single page, it is necessary to adjust the column widths. Exit Print Preview to re-adjust the column widths, if needed.**

STEP 4:   Click the **Print** button when ready to save/print.

STEP 5:   Choose a printer in the **Print** window.

- To save to file, select **PrimoPDF** or a similar application. (If there is no PDF printer, please call the Help Desk to have one installed.)

- To print to paper, select the desired printer.

STEP 6:   Click **OK**. If using a PDF printer, the application will ask for a destination folder and file name. Follow the prompts to save the document to the desired location.