From the Office of Clinical Informatics

Reporting Portal
Running the DynDoc Default CC Report

July 22, 2019

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

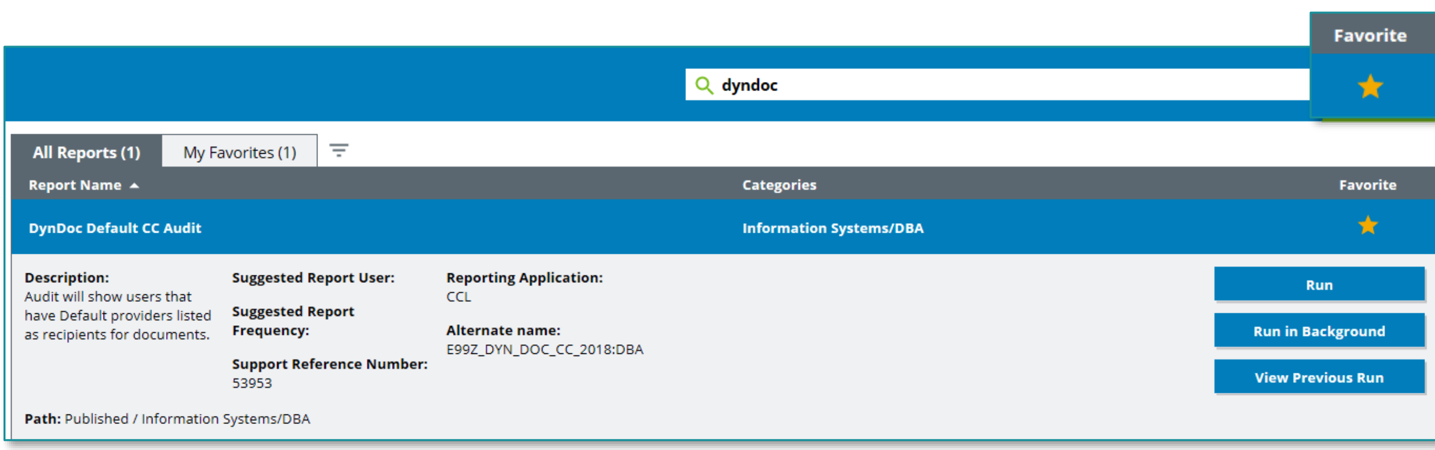
Default CC's should only be used by users in which any and all notes need to go to that recipient upon signature. Typical scenarios include an NP/PA needing co-signature by their attending on all notes or a scribe working with the same provider in which all notes need co-sign. Physicians should never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

Running the DynDoc Default CC Report

This report is run from the Reporting Portal within PowerChart.

STEP 1: Log into the Reporting Portal [Reporting Portal] using network username and password.

STEP 2: In the search box, type in '**dyndoc**'. The **DynDoc Default CC Audit** report will appear in the All Reports tab.

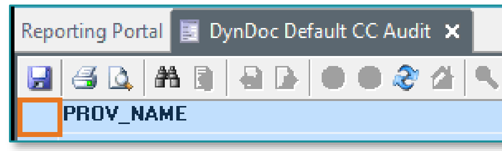


NOTE: You can add this to your list of favorites by selecting the star icon to the right of the report name.

STEP 3: Select **Run**.

Exporting to Excel

This report will output in a .csv format. To quickly and easily export to an excel spreadsheet for better filtering options, click the blank cell to the left of PROV_NAME. This will highlight the entire report. Use Ctrl+C to copy. Open a blank Excel document and use Ctrl+V to paste the report.



Interpreting 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 (PROV_LOC) and column I (PVC_PROV_LOC) are the names/locations of the providers that have been default CC'd.

Verify if you have providers/staff on the report from column B and/or column D.

a. If the user is a NP/PA – verify that the provider listed in column H is their attending or supervising physician and is appropriate to send all notes to.
    i. If it is not, communicate with provider to remove default CC. Instructions on how to do this found here.
b. If the user is a staff member acting as a scribe – verify that the provider listed in column H is their supervising physician and is appropriate to send all notes to.
    i. If it is not, communicate with staff to remove default CC. Instructions on how to do this found here.
c. If the user is a physician, please communicate with physician to remove default CC. Instructions on how to do this found here.

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