



ChartNet

SG02 - Carbon Copies

Carbon Copies

1.1	Overview	2
1.2	Glossary of Terms	3
1.3	Tables and Fields used for CCs	4
1.4	Batch Printing CCs	6
1.5	Auto-Faxing CCs	7
1.6	Auto-Emailing CCs	8
1.7	Using the CC List	9
1.8	Bracketed Fields used for CCs	10
1.9	Auto-distribution Examples	11

Chapter 1

Carbon Copies

1.0 Carbon Copies

1.1 Overview

ChartNet has a variety of options for handling carbon copies ("CC's") depending on what the site's requirements are. A "carbon copy" is defined as anyone that needs a copy of a report, for example, the dictating physician or the referring physician. Any type of form can be sent to a CC recipient, including letters and envelopes.

1.2 Glossary of Terms

CC List	The list of CC recipients attached to a report. The CC List can have entries manually added to it by the transcriptionist (using the "CC List" button on the Report Data Screen), or the CC List can be automatically added to if providers are set up for "Auto-distribution".
Auto-distribution	Refers to automatically sending a copy of a report to someone either by printing a copy, faxing a copy, or emailing a copy. Providers set up for auto-distribution only need to have their Provider code or Address code entered into the Report Data Screen by the transcriptionist. Providers set up for auto-distribution will automatically be added to the CC List.
Bracketed Fields	The technique used in ChartNet to "merge" data fields from various database tables into a report at print time. CC's have a special set of bracketed fields to help print CC information in different formats. A description of CC bracketed fields can be found later in this chapter.

CC Batch Queue - Letters
Printer - Plain
Printer - Letters
Printer - Envelopes

Batch Controller File

You must create a Batch Controller entry for each batch queue required for CC printing. Normally just two queues would be needed, one for plain paper forms, and one for letters. The next topic title "Batch Printing CC's" will give more detail in setting these up.

Batch Print Definition File

You must create one or more Batch Print Definition records that will be used when printing the CC's. The next topic title "Batch Printing CC's" will give more detail in setting these up.

1.4 Batch Printing CCs

Normally, carbon copies that need to be printed are done so using the Batch Controller. In order to batch print CC's, the site must be set up with special devices and batch controller records. The following example assumes that you need to print CC's for plain paper reports, letters, and envelopes. Site code of 100 is used for this example.

1. Create an envelope form in the Forms file with the form code of "ENV-CC". See the section in the document "SG07 - Forms Design" on how to design an envelope form.
2. Create a header device called "CC BATCH - PLAIN" with output path of %root%\batch\%site%\cc\plain.
3. Create a header device called "CC BATCH - LETTERS" with output path of %root%\batch\%site%\cc\letters.
4. Create a printer device called "PRINTER - PLAIN".
5. Create a printer device called "PRINTER - LETTERS".
6. Create a printer device called "PRINTER - ENVELOPES" with override form of "ENV-CC".
7. In the Sites file, set the "Default CC Device" to "CC BATCH - PLAIN".
8. In the Forms file, for the forms that are to print on letterhead, set the "Override CC Device" to "CC BATCH - LETTERS".
9. Create a Batch Controller record with ID of "100-1" and description of "CC Batch - Plain".
10. Create a Batch Controller record with ID of "100-2" and description of "CC Batch - Letters".
11. Create a Batch Print Definition for ID "100-1" with description of "Print CC Plain" and device of "PRINTER - PLAIN".
12. Create a Batch Print Definition for ID "100-2" with description of "Print CC Letters" and device of "PRINTER - LETTERS".
13. Create a Batch Print Definition for ID "100-2" with description of "Print CC Envelopes" and device of "PRINTER - ENVELOPES".

1.5 Auto-Faxing CCs

Auto-faxing of CC copies is accomplished using the ChartNet Fax Service (mtfax), which must be installed and running on a ChartNet server prior to configuring a site for faxing. Faxing can be done either at the host site, or from a remote site.

Procedure for setting up a dictating provider for auto-faxing

1. Add the dictating provider to the Address file, specifying the fax phone number and setting the "Auto-distribution" code to "FAX".
2. Update the Provider record for this dictating physician with the Address code so that the Provider record is linked to the Address record.
3. Verify that the "DOCTOR" field is in the list of data entry fields for each form.

Procedure for setting up a referring physician for auto-faxing

1. Add a new field to the Fields file called [SITE]_REFDR and link it to the Address table. Leave the "Database Field" blank.
2. Add [SITE]_REFDR to the form's list of data entry fields.
3. Add the referring physician to the Address file, specifying the fax phone number and setting the "Auto-distribution" code to "FAX".

1.6 Auto-Emailing CCs

Auto-emailing of CC copies is accomplished using the ChartNet Email Service (mtmail), which must be installed and running on a ChartNet server prior to configuring a site for emailing.

Note - ChartNet sends reports via email by batching all reports into a single file and then encrypting it. To open the email file attachment, the email recipient must download and install the "ChartNet Email Print" application, which is used to decrypt and print the reports. The "ChartNet Email Print" program is available from the Hudson Medical Systems web site.

Procedure for setting up a dictating provider for auto-emailing

1. Add the dictating provider to the Address file, specifying the email address and setting the "Auto-distribution" code to "EMAIL".
2. Update the Provider record for this dictating physician with the Address code so that the Provider record is linked to the Address record.
3. Verify that the "DOCTOR" field is in the list of data entry fields for each form.

Procedure for setting up a referring physician for auto-emailing

1. Add a new field to the Fields file called [SITE]_REFDR and link it to the Address table. Leave the "Database Field" blank.
2. Add [SITE]_REFDR to the form's list of data entry fields.
3. Add the referring physician to the Address file, specifying the email address and setting the "Auto-distribution" code to "EMAIL".

1.7 Using the CC List

For CC recipients who are NOT set up for auto-distribution, ChartNet offers a way for the transcriptionist to manually add names (and addresses) to the report's CC list. The CC's can be obtained by doing a lookup on the Address file, or by manually typing in the names and addresses.

Note - CC's that are manually added to the CC List that are not in the Address file can only be printed (not faxed or emailed).

The CC List is accessed via a button located on the Report Data Screen called "CC List".

The following is an example of the CC List screen.

Name	Type	Address 1	Address 2	Address 3
Jack Cook, D.O.	FAX			
James T. Murdock, MD	PRINT	876 Main Street	Suite 101	Hudson, Ohio 44236

To add a name, press F1 to do a lookup on the Address file.
If the name is not in the Address file, type in the name. If an envelope is to be printed, fill in the address lines.
To add an entry to the CC: list, but not print a copy, leave the TYPE field blank.

Address File Clear All Clear Current Row OK (F10) Cancel

To add a name from the Address file, press the F1 key to access the Address Lookup screen.

If the name is not found in the Address file, you may type it in manually.

Note- If an envelope is to be printed, you must supply the address1, address2, and address3 fields.

After all CC's have been added, press F10 to save the list and return to the Report Data Screen.

Important! After returning to the Report Data Screen, you must press F10 again to save the data to the file.

1.8 Bracketed Fields used for CCs

The default behavior in ChartNet is to have any CC's that are listed in the CC List to automatically print their names at the bottom of the report. For example:

cc: William P. Smith, M.D.
Todd Brown, M.D.

To override this feature, you must first disable the automatic insert of the CC names by going into the form and checking the appropriate box located on the "Formatting" page. Then you must add to the form's footer (signature block), one of the following special bracketed fields listed below.

[X.ALL_CC_NAMES]

Printed all CC names using the same format as the automatic CC insert feature, except you can specify where on the form the names will appear.

Example: cc: William P. Smith, M.D.
Todd Brown, M.D.

[X.ALL_CC_NAMES2]

Printed all CC names on one line with each name separated by a slash character.

Example: cc: William P. Smith, M.D. / Todd Brown, M.D.

[X.ALL_CC_ADDRESSES]

Prints all CC names and addresses, each on separate lines.

Example: cc: William P. Smith, M.D.
46 Ravenna St.
Hudson, OH 44236

Todd Brown, M.D.
999 Main St.
Hudson, OH 44236

[X.ALL_CC_ADDRESSES2]

Prints each CC name and address on a separate line.

Example: cc: William P. Smith, M.D. (46 Ravenna St, Hudson, OH 44236)
Todd Brown, M.D. (999 Main St, Hudson, OH 44236)

[X.ALL_CC_ADDRESSES3]

Prints each CC name and address on a separate line. If CC is auto-fax or auto-email, will not print the address, but will print either "FAX" or "EMAIL" in order to let the distribution clerk know what happened.

Example: cc: William P. Smith, M.D. (FAX)
Todd Brown, M.D. (999 Main St, Hudson, OH 44236)

1.9 Auto-distribution Examples

The following are examples of how auto-distribution recipients are set up.

Dictating provider wants a copy of every report automatically faxed to his/her office.

1. Create an Address record for the dictating provider, specifying the fax phone number. Set the auto-distribution to 'FAX'.
2. Update the Provider file by searching for the dictating provider and entering the Address Code.

Referring physician wants a copy of every report automatically faxed to his/her office.

1. Create a new field in the Fields file called [SITE]_REFDR and link it to the Address table.
2. Add the [SITE]_REFDR field to the list of data entry fields for all forms
3. Create an Address record for the referring physician, specifying the fax phone number. Set the auto-distribution to "FAX".

Provider wants a copy printed and mailed to their office.

1. Create an Address record for the provider and specify the mailing address. Set the auto-distribution to "PRINT".