



Clinical Documentation Routing from the CIS

The CIS supports automated clinical documentation routing, ensuring that key documents are automatically shared with members of a patient's circle of care.

Guiding principles

1. Notes labelled "**Progress Note**" are intended for inpatient documentation and **do not** automatically route to EMRs.
2. Notes labelled "**Clinic Note**" are intended for outpatient/ambulatory visits and **do** automatically route.
3. Notes labelled "**Consult Note**" are intended for both inpatient and outpatient documentation and **do** automatically route.

See [Appendix A](#) for the details on specific note types that automatically route.

Ensuring your note will successfully send from the CIS

4. **Verify provider information:** Ensure the patient's primary care and/or referring provider details are accurate, including the correct location if they practice at multiple sites.
5. **Select the appropriate note type:** Refer to Appendix A for note types that automatically distribute.
6. **Confirm recipients in CC/Review:** When signing your note, ensure all intended individuals are included in the CC/Review field.

How it works

When specific note types are signed (see Appendix A), copies are automatically sent to relevant providers, such as:

- Primary Care Providers (PCPs)
- Referring Providers
- Any providers included in the CC field when signing

Delivery methods

Community Providers:

- Sent to their EMR, or
- Delivered via fax, depending on their preferences.

Provider Portal:

- Documents are also available in the Provider Portal, where community providers can view them in a read-only format.

Within the CIS:

- Documents are delivered directly to users in the system via Message Center

Note: If an addendum is added or modifications made after signing and circulation, the notes are automatically *re-circulated* to all in the original CC.



Fax distributions

When a document is sent from the CIS to a fax machine, the system attempts up to three times. If it is unsuccessful, the fax is then sent to a special queue which is monitored by HIM teams locally to ensure appropriate action is taken. In summary—if a *faxes from CIS fails, you will be notified.*

EMR distributions

Many providers have EMRs. CCing them into your documentation (as “Review/CC”) allows the document to flow through CorePoint and be distributed to their EMRs. **Note:** Providers receiving eResults are excluded from the fax distribution to limit duplicate documentation

Note:

- If a document is sent from the CIS to a community provider via fax and the transmission fails, it is routed to a queue monitored by Health Information Management (HIM) for follow-up.
- If a document is sent to an EMR, it is transmitted through CorePoint. There is no visible confirmation in the CIS to indicate to end users whether the transmission was successful.

CCing in Providers at documentation creation

Documents not designated for automatic distribution can be sent out if the creating provider manually adds providers—such as the PCP, Referring, Consulting, or other reviewing (CC) providers.

CRITICAL: The correct Location-Based Provider Account must be chosen to reliably ensure the document reaches the right provider at the right location. Confirm your patients PCP and Referring Providers often.

To circulate your note at the time of signing, add Reviewing/CC Providers:

1. Complete Documentation and select **Sign/Submit**
2. A new window will appear, on the left side of the pop-up box, choose recipient(s) from:
 - Favorites,
 - Recent,
 - Relationships – these will be all providers who are already associated with the patient,
 - Or Provider Name Search
3. Click the plus (+) button next to the provider you want to add as a Reviewing/CC
4. Ensure the radio dial is set to **Review/CC** (*not sign*—selecting sign is only for other providers you wish to sign the document in the OPOR-CIS, for example, a resident to an attending)
5. Click **Sign**



Appendix A: Automatically Routed to External EMRs, HIE, and fax distributions

Advanced Directives

SDM Advanced Directive
Goals of Care/Level of Intervention
Advance Directive Documents
Advance Directive Revocation

Anesthesia/Sedation Records

Anesthesia Consult Note
Anesthesia Pain Consult Note
Anesthesia Procedure Note

Cardiology

12 Lead Echocardiogram
12 Lead Electrocardiogram
12 Lead Holter Monitor
14 Day Holter Monitor
14 day Holter Monitor
15 Lead Echocardiogram
15 Lead Electrocardiogram
15 Lead Electrocardiogram
24 Hour Holter Monitor
30 Day Holter Monitor
30 Day Holter Monitor
48 Hour Holter Monitor
7 Day Holter Monitor
7 day Holter Monitor
72 Hour Holter Monitor
Ambulatory Blood Pressure Monitor
Ambulatory Blood Pressure Monitor
CARD Aortic Valvuloplasty
CARD Atrial Septal Defect (ASD) Closure
CARD Chronic Total Occlusion Procedure
CARD Coronary Angiography +/- PCI
CARD Coronary Angiography Grafts
CARD Coronary Angiography Only
CARD Electrophysiology Ablation
CARD Electrophysiology study
CARD Fractional Flow Reserve (FFR)
CARD Implantable Cardioverter Defibrilla
CARD Intravascular Coronary Imaging



CARD Intravascular Lithotripsy
CARD Left Atrial Appendage Closure (LAA)
CARD Left Ventricle End Diastolic Pressu
CARD Left Ventriculogram (LV) Gram
CARD Melody Valve
CARD MitraClip Procedure
CARD Nipride Challenge
CARD Pacemaker - Bi-Ventricular
CARD Pacemaker - Dual Chamber
CARD Pacemaker - Single Chamber
CARD Pacemaker Lead Revision
CARD Pacemaker Removal - Bi-Ventricular
CARD Pacemaker Removal - Dual
Chamber
CARD Pacemaker Removal - Single
Chamber
CARD Paravalvular Leak Closure
CARD Patent Ductus Arteriosus (PDA) Clos
CARD Patent Foramen Ovale (PFO)
Closure
CARD Planned Percutaneous Coronary
Inter
CARD Pulmonary Artery Angiogram
CARD Pulmonary Valve Implant
CARD Pulmonic Valvuloplasty
CARD Right Heart Pressures
CARD Right Ventricle Biopsy
CARD Rotoblator Procedure
CARD Transcatheter Aortic Valve Insertio
CARD TriClip Procedure
CARD Valve Fluoroscopy
Cardiopulmonary Stress Test
ECHO 2D M Qualitative Doppler
ECHO 2D M Qualitative Doppler Mobile
ECHO 2D M Quantitative Doppler
ECHO 2D M Quantitative Doppler Mobile
ECHO Adult Congenital
Echo Adult Congenital
ECHO Anaesthesia
ECHO Bubble Study
ECHO Contrast



ECHO Exercise Stress
ECHO Limited
ECHO Pediatric Transesophageal
ECHO Pediatric Transthoracic
ECHO Pericardial Tap
ECHO Pericardial Tap Mobile
ECHO Pharmacologic Stress
ECHO Pharmacologic Stress Mobile
ECHO Transesophageal
ECHO Transesophageal Mobile
ED 12 Lead Electrocardiogram
Event Monitor - 14 Day
Event Monitor - 14 Day
Event Monitor - 30 Day
Event Monitor - 30 Day
Event Monitor - 7 Day
Event Monitor - 7 Day
Exercise Stress Test
Exercise Treadmill Test
Pacemaker Check - Bi-Ventricular
Pacemaker Check - Dual Chamber
Pacemaker Check - Single Chamber
Pediatric Electrocardiogram
Pediatric Electrocardiogram
Pediatric Holter Monitor
Pediatric Holter Monitor
PFT ABG Only
PFT Comp Pre Only MIP-MEP w ABG
PFT Complete
PFT Complete Paediatric
PFT Complete Post MIP-MEP w ABG
PFT Complete Post w ABG
PFT Complete Pre Only
PFT Complete Pre Only MIP-MEP w ABG
PFT Complete Pre Only w ABG
PFT Complete Pre Only w MIP-MEP
PFT Complete w Post
PFT Complete w Post w MIP-MEP
PFT CPX - CPET Exercise
PFT DLCO Only
PFT Exercise



PFT Exertional Hypoxemia
PFT Home O2 Assessment
PFT Methacholine
PFT Methacholine w Post
PFT O2 Titration
PFT Plethysmography Only
PFT Spiro Pre Only MIP-MEP Oxim
PFT Spiro Pre Only w Oximetry
PFT Spiro w Post MIP-MEP Oximetry
PFT Spirometry Pre Only
PFT Spirometry Pre Only MIP-MEP
Oximetry
PFT Spirometry Pre Only w MIP-MEP
PFT Spirometry Pre Only w Oximetry
PFT Spirometry w Post
PFT Spirometry w Post MIP-MEP
PFT Spirometry w Post MIP-MEP Oximetry
PFT Spirometry w Post w Oximetry
Signal Averaged Electrodiagram
Signal Averaged Electrodiagram
Six Minute Walk Test
Telemetry Monitor
Tilt Table Test
Tilt Table Test
Cardiac Cath Interventional Procedure
Cardiac Cath Lab Procedure Report
Cardiac Catheterization diagnostic
Cardiology General Procedure
CRT insertion
Echo Report
Electrocardiogram EKG
EP study/ablation
Hemo intra-procedure report
Holter Monitor
Lead change
Myocardial Biopsy
Pacemaker Generator Change
Pacemaker Insertion
Pacemaker Report
PCI (Percutaneous Coronary Intervention)
Right Heart Catheterization



TAVR

FATC

FATC Amniocentesis
FATC Biophysical Profile (BPP)
FATC Chorionic Villus Sampling (CVS)
FATC Comprehensive/Anatomy Scan
FATC Comprehensive/Anatomy Scan Plus
FATC Dating/Viability
FATC Early Pregnancy Review (EPR)
FATC Fetal Doppler
FATC Fetal Echo
FATC Fetal Procedure
FATC First Trimester Multiples
FATC Growth
FATC Growth Scan Plus
FATC Maternal Dopplers
FATC Second/Third Trimester Multiples
FATC Transvaginal Ultrasound
FATC Umbilical Dopplers Only

Gastroenterology Procedures

24 Hour pH Probe
72-Hr Fecal Fat/Weight
Abdominal Paracentesis
Abdominal Ultrasound
Anorectal Manometry
Anorectal Ultrasound
Colonoscopy
Endoscopic Ultrasound
ERCP
Esophageal Manometry
Esophagogastroduodenoscopy EGD
Feeding Tube Placement
Flexible Sigmoidoscopy
Glucose-Hydrogen Breath Test
Lactose-Hydrogen Breath Test
Liver Biopsy
Panendoscopy
Sigmoidoscopy
Upper Endoscopy
Urea Breath
Wireless Capsule pH



Consultations

Acute Pain Service (APS) Consultation
Allergy/Immunology Consultation
Anesthesiology Consultation
Benign Hematology Consultation
Cardiac Surgery Consultation
Cardiology Consultation
Clinical and Molecular Pathology Consult
Consultation Note
Critical Care / ICU Consultation
Dentistry Consultation
Dermatology Consultation
Diagnostic Radiology Consultation
Dietitian Consultation
Emergency Medicine Consultation
Endocrinology Consultation
Family Practice Consultation
Gastroenterology Consultation
General Surgery Consultation
Geriatrics Consultation
Gynaecology Consultation
Hematology Consultation
Hospitalist Consultation
Infectious Disease Consultation
Internal Medicine Consultation
Interventional Radiology Consultation
Lactation Consultation
Medical Assistance in Dying Consultation
Medical Oncology Consultation
Mental Health and Addiction Consultation
Midwife Consultation
Neonatology Consultation
Nephrology Consultation
Neurology Consultation
Neurosurgery Consultation
Nuclear Medicine Consultation
Obstetrics Consultation
Oncology Consultation
Ophthalmology Consultation
Oral Maxillofacial Consultation
Orthopedic Consultation



Otolaryngology / ENT Consultation
Pediatrics Consultation
Palliative Care Consultation
Pathology Consultation
Pediatric Benign Hematology Consultation
Pediatric Oncology Consultation
Physical Medicine Consultation
Plastic Surgery Consultation
Primary Care Consultation
Psychiatry Consultation
Psychology Consultation
Radiation Oncology Consultation
Rehab Medicine / CMC
Respirology Consultation
Rheumatology Consultation
Thoracic Surgery Consultation
Urology Consultation
Vascular Consultation

Discharge Documentation

Discharge Letter
Discharge Medication List
Discharge Summary

Emergency Documentation

ED Clinical Summary
ED Discharge Information
ED Note GEM
ED Note Provider
ED Notes

Genitourinary Procedures

Doppler Penile Urosonography
Ileoscopy
Lithotripsy Treatment
Pudendal Nerve Stimulation
Renal Ultrasound

History & Physical Reports

History & Physical

Lab

Critical lab Values
Newborn Screening Lab
Prenatal Screening Lab

Long Term Care Documentation



Long Term Care Clinical Summary
Long Term Care Discharge Instructions

MHA

Mental Health Outpatient
Neuropsychological Assessment
Psychiatrist Admission Note
Psychiatrist Discharge Note

Neurology Procedures

Visual Evoked Potential VEP
Brainstem Electrical Response
Electroencephalography EEG
Electromyogram
Nerve Conduction

Office/Clinic Notes

Allergy / Immunology Clinic Procedure
Allergy Immunology Office Clinic Note
Ambulatory Clinical Summary
Audiology Office Clinic Note
Cardiac Rehab Note
Cardiac Surgery Clinic Procedure
Cardiac Surgery Office Clinic Note
Cardiology Clinic Procedure
Cardiology Office Clinic Note
Cardiovascular Surgery Office Note
Care Plan Ambulatory
Clinic Procedure
Clinical Research Note
Dentistry Clinic Procedure
Dentistry Office Clinic Note
Dermatology Clinic Procedure
Dermatology Office Clinic Note
Endocrinology Office Clinic Note
ENT Office Clinic Note
Family Medicine Clinic Procedure
Family Medicine Office Clinic Note
Fracture Liaison Clinic Procedure
Fracture Liaison Office Clinic Note
Gastroenterology Office Clinic Note
General Surgery Clinic Procedure
Genetics Clinic Procedure
Genetics Office Clinic Note



Geriatrics Office Clinic Note
Gynecology Office Clinic Note
Heart Function Clinic Note
Hematology Clinic Office Note
Hematology Clinic Procedure
Infectious Disease Office Clinic Note
Infusion Services Clinic Procedure
INSPIRED Clinic Procedure
INSPIRED Office Clinic Note
Internal Medicine Office Clinic Note
MS (Neurology) Clinic Procedure
MS (Neurology) Office Clinic Note
Neonatal Clinic Office Note
Neonatology Clinic Procedure
Nephrologist Office Clinic Note
Nephrology Clinic Procedure
Nephrology Office Clinic Note
Neurology Clinic Procedure
Neurology Office Clinic Note
Neuropsychology Clinic Procedure
Neuropsychology Office Clinic Note
Neurosurgery Clinic Procedure
Neurosurgery Office Clinic Note
Obstetrics Clinic Procedure
Obstetrics Office Clinic Note
Office Clinic Note Nurse, MA
Office Clinic Note Provider
OMF Clinic Procedure
OMF Office Clinic Note
Ophthalmology Office Clinic Note
Orthopedic Office Clinic Note
Orthopedic Clinic Procedure
Otolaryngology Clinic Procedure
Otolaryngology Office Clinic Note
Outpatient Clinic Complex Note
Pediatric GI Office Clinic Note
Pediatric ID Office Clinic Note
Pediatric Neurology Office Clinic Note
Pediatric Oncology Office/Clinic Note
Pediatrics Office Clinic Note
Pain Management Office Clinic Note



Palliative Med Clinic Procedure
Palliative Med Office Clinic Note
Physiatrist Office Clinic Note
Physical Med and Rehab ClinicOffice Note
Plastic Surgery Office Clinic Note
Podiatry Office Clinic Note
Radiology Medicine Clinic Procedure
Rehab Medicine Office Clinic Note
Respirology Clinic Procedure
Respirology Office Clinic Note
Rheumatology Clinic Procedure
Rheumatology Office Clinic Note
Sleep Medicine Clinic Office Note
Sleep Medicine Clinic Procedure
Sports Medicine Clinic Procedure
Sports Medicine Office Clinic Note
Surgery Office Clinic Note
Surgical Oncology Clinic Procedure
Thoracic Clinic Procedure
Thoracic Office Clinic Note
Trauma Office Clinic Note
Urgent Care Office Clinic Note
Urology Office Clinic Note
Vascular Office Clinic Note
Vascular Surgery Clinic Prodeure
Vascular Surgery Office Clinic Note
Child Protection Clinic Note
Wound Clinic Office Note
Wound Clinic Procedure

Oncology Documentation

Benign Hematology Progress Note
BMT Note
Cancer Staging Documentation
Leukemia Tumour Board Note
Oncology Clinical Trial
Oncology Medication Calendar
Oncology Roadmap
Oncology Tumour Board Note
Oncology Multi-Disciplinary
Oncology Progress Note
Oncology Systemic Treatment Note



Radiation Planning Note
Tumour Conference Summary

Misc

Urgent Treatment Center Assessment
Care Collaboration Note
Record of Death
Smoking Cessation Program
Trauma Note
Trauma Team Report
Treatment Summary Note
Wound Care Plan

Misc Procedures

Critical Care / Intensivist Procedure
Endovascular Procedure
Procedure Note

Rehabilitation Documentation

Outpatient Dietitian Note
Outpatient OT Note
Outpatient OT Plan Note
Outpatient PT Note
Outpatient PT Plan Note
Outpatient Recreation Note
Outpatient SLP Note
Outpatient Social Work Note
Outpatient Speech Language Plan Note
Outpatient Swallow Plan Note
Physical Therapy Rehab Note
Rehab Outcome Measures

Respirology Procedures

Bronchoscopy
Bronchoscopy Note
Pulmonary Function Studies
Sleep Study

Surgical Documentation

NPWT Note
NSWOC Post-op Note
NSWOC Pre-op note
Operative Report

Women's Health Documents

Midwifery Homebirth Note
OB Delivery Note



WH Clinical Summary