Maximizing Your Efficiency with PCC EHR

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Physician's Computer Company
PCC Users' Conference
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Goal of this Course

- PCC EHR changes constantly and we are always adding new and exciting features that can help you optimize your charting.

- This course will focus on some of the new functionality in PCC EHR that can help you utilize PCC EHR more effectively.

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Auto-Notes

- Auto-notes are configured by protocol and can be set for each provider individually or for the entire practice.

- They can only be set for radio button components.

- The auto-notes configuration tool is found under the Tools menu in PCC EHR.

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Auto-Notes Configuration

Auto-Notes Configuration

Last Answer

- The Last answer feature can be used with the following components
  - Smoking Status (ARRA)
  - Generic Q&A
  - Generic Check box
  - Generic Text Edit
- The last answer feature will show the last answer entered for the patient. You can choose to type a new answer or click the "Last Answer" button to move the answer into the text field.
- The last answer functionality is set at the component level in the configuration tool. It is not possible to have the memory enabled in one protocol, but not in another.

Configuring Last Saved Answer
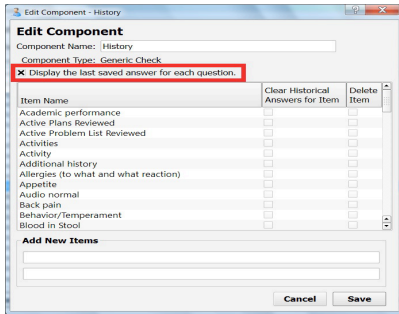
Last Answer Check Box Component
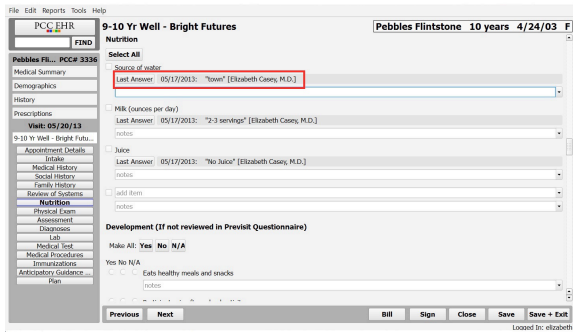
Smart Answer Boxes

- Any note box that has a drop down arrow is a smart box and can remember past answers in two different ways:
  - Patient
    - A box that remembers by patient will remember last answers only for that patient across all protocols
  - Provider
    - A box that remembers by provider will remember last answers across all patients, but only for that specific protocol
- The memory option is set when the component is added to a protocol.
- Each smart box will remember the top 10 answers.

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Set Memory in Configuration Tool
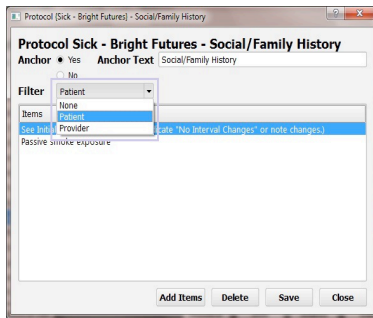

Smart Box in Protocol
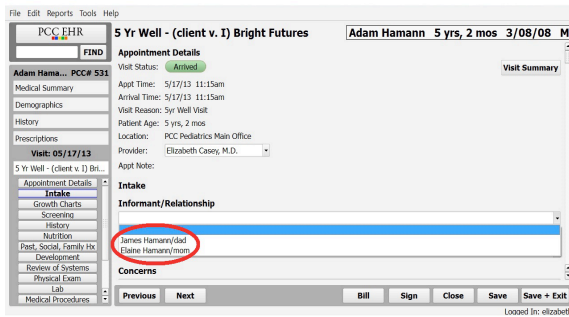
Remove Additional Task from Lab orders

- Labs that have individual tests will show on the visit task queue as an order, if the lab still has the additional task, the lab will show twice on the visit task queue.

- If the additional task is not needed, it is possible to remove it.

- In order to remove the task from an order, click Edit and delete the name of the task and the To: assignment (if the task has been assigned).

Lab with additional task

File Edit Reports Tools Help

PCC EHR
FIND

9-10 Yr Well - Bright Futures | Pebbles Flintstone 10 years 4/24/03 F
Lab

Pebbles Fli... PCC# 3336
Medical Summary
Demographics
History
Prescriptions

Visit: 05/17/13
9-10 Yr Well - Bright Futu...
Appointment Details
Intake
Medical History
Social History
Family History
Review of Systems
Nutrition
Physical Exam
Assessment
Diagnoses
Lab
Medical Test
Medical Procedures
Immunizations

Edit   Hemoglobin   Ordered   TO: anita
DETAILS Facility: PCC Pediatric Test Associates (Doctor's Office)   Order Date: 05/17/13

▼ 1 Task   0 Completed
⊕ TASK: Collect Specimen   TO: alice

Order Hematocrit
Order Lead Screen
Order select a lab
Medical Test
Order select a medical test
Medical Procedure
Order select a medical procedure
Screening

Previous   Next   Bill   Sign   Close   Save   Save + Exit
Logged In: elizabeth

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Deleting additional task

File Edit Reports Tools Help

PCC EHR
FIND

9-10 Yr Well - Bright Futures | Pebbles Flintstone 10 years 4/24/03 F
Lab

Pebbles Fl...* PCC# 3336
Medical Summary
Demographics
History
Prescriptions

Visit: 05/17/13
9-10 Yr Well - Bright Futu...
Appointment Details
Intake
Medical History
Social History
Family History
Review of Systems
Nutrition
Physical Exam
Assessment
Diagnoses
Lab
Medical Test
Medical Procedures
Immunizations

EDITING   ⊖ Hemoglobin   Ordered   TO: Anita Sharp
DETAILS Facility: PCC Pediatric Test Associates (Doctor's Office)   Order Date: 05/17/13
□ Specimen Collected: By enter user name   mm/d...   12:00 AM
Test   Result   Units Reference Range Interpretation ALL NORMAL
Hemoglobin   g/dL   11 to 16 g/dl   select interpretation
Condition/Disposition: select a condition or disposition of specimen
Note: enter notes here
□ Signature Required   □ Canceled ✖ Include on Patient Reports

TASK enter task name   TO
NOTE enter task notes here
□ Task Completed   AT mm/d...   12:00am BY enter user name

ADD TASK   DISCARD CHANGES   SAVE ORDER

Order Hematocrit

Previous   Next   Bill   Sign   Close   Save   Save + Exit
Logged In: elizabeth

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Lab without additional task

File Edit Reports Tools Help

PCC EHR
FIND

9-10 Yr Well - Bright Futures | Pebbles Flintstone 10 years 4/24/03 F
Lab

Pebbles Fli... PCC# 3336
Medical Summary
Demographics
History
Prescriptions

Visit: 05/17/13
9-10 Yr Well - Bright Futu...
Appointment Details
Intake
Medical History
Social History
Family History
Review of Systems
Nutrition
Physical Exam
Assessment
Diagnoses
Lab
Medical Test
Medical Procedures
Immunizations

Edit   Hemoglobin   Ordered   TO: anita
DETAILS Facility: PCC Pediatric Test Associates (Doctor's Office)   Order Date: 05/17/13

Order Hematocrit
Order Lead Screen
Order select a lab
Medical Test
Order select a medical test
Medical Procedure
Order select a medical procedure
Screening
Order select a screening

Previous   Next   Bill   Sign   Close   Save   Save + Exit
Logged In: elizabeth

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Removing Task from Orders

- When ordering items in PCC EHR, it is not always necessary to assign a task to a different user. For example, a provider may order a developmental screen and also complete the screening, so they don't need a task to the nurse.
- For orders that do not need a task, it is possible to remove the task from the order to save the step of editing the order and clicking Task Completed.
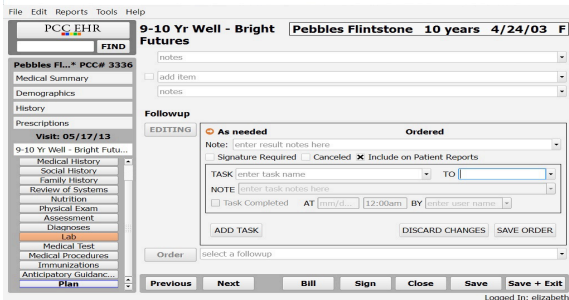
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Removing Task from Order

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Order without any tasks

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Utilizing User Groups on Visit Task Queue

- If you have multiple people in the office who perform the same job (ex: front desk, nurse), think about using a user group instead of assigning tasks to individual users. This way, if someone is out, there won't be tasks assigned specifically to them.

- User groups can also be used to keep track of pending labs or referrals

- Examples of user groups:
  - Front desk
  - Nurse
  - Referral
  - Pending lab

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User Groups in User Administration Tool
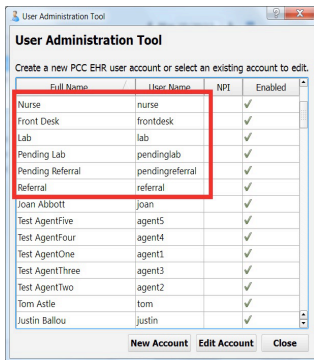
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User Groups on Visit Task Queue
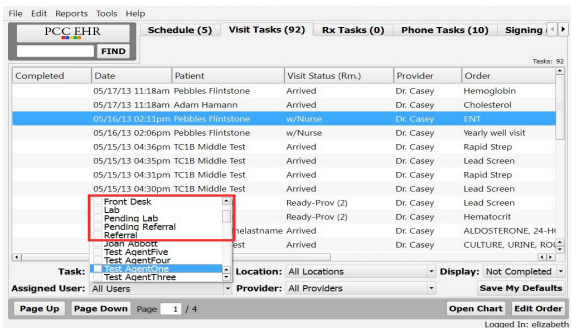
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New User Attributes

- If your office is utilizing user groups, it is possible to remove active users from the list when assigning a task for an order. This new option can take the confusion out of assigning tasks.

- There are two check boxes:
  - This user can be: Assigned Tasks
  - This user can be: Selected as an Assigned User in the task queues

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New User Attributes in User Administration
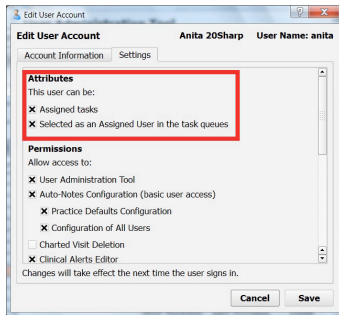
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Select Multiple Users

- Multiple users can be selected on the task queues and schedule screen in PCC EHR. For example, if a nurse is working with two doctors, they can set their schedule screen to show both provider's schedule.

- The counters at the top of the task queues can be a helpful tool and are based on the filters you have selected on the queue.

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Selecting Multiple Users

Configure the Medical Summary Screen

- It is possible to configure the Medical Summary screen to only show the components that you need.

- Creating new chart-wide note components helps store more information on the Medical Summary screen. For example you could create a Hospitalization History component.

- Any chart-wide note component can also be added to a visit protocol for quick reference during the visit.

Medical Summary Builder in Configuration Tool

Configuring Medical Summary Screen
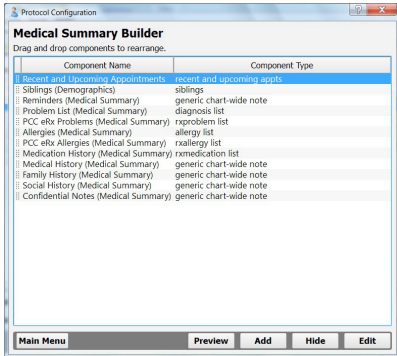
Create New Medical Summary Components
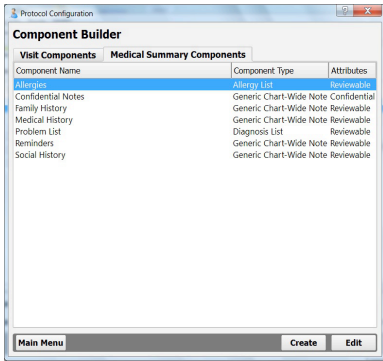
Allowing Medical Summary Components to be Reviewed in protocol
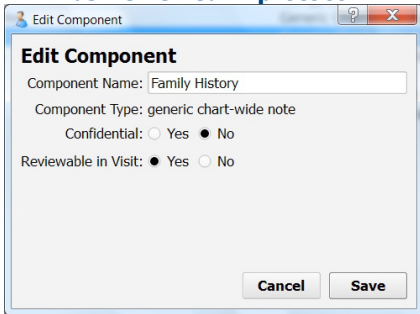
Add Medical Summary Components to Protocol
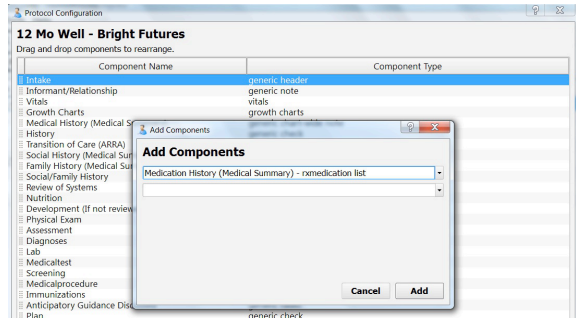
Medical Summary Components in Protocol

Charting for multiple siblings

- If you are seeing two or more patients in the same family, you can open all of their charts and toggle between them. You can have 4 charts open at a time.

- This optimizes charting for more than one patient because you don't need to close out of one chart to open another.

- The siblings are found on the Demographic screen under History, but the component can be added to the Medical Summary screen and the visit protocol.

Opening Multiple Siblings' Charts

Multiple Charts Open

Copy Medical Summary Notes to Siblings

- If you have notes entered on one patient's medical summary screen you can easily copy those notes their sibling(s).
- The notes can be copied by right-clicking on the note or clicking on the edit menu in the patient's chart.

Copy Family History Notes

Copy Medical Summary Notes to Sibling

Copy Options for Notes

Flowsheets

- Flowsheets can be used to track diagnoses, labs, medical tests, radiology orders, screenings and vitals.
- If there is a particular test (ex. hearing and vision) you want to be able to track, it must be placed under medical tests or screening.
  - If you need to move items from one order type to another, our development team can move the historical information onto the flowsheet screen.

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Flowsheet Screen

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Set Default Orders in Protocols

- Setting default immunizations, labs, medical tests, etc in protocols based on the age of the patient makes ordering much faster.
- Default immunizations can also help guide you to order the immunizations that are due for a specific age.

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Default Immunizations

Default Orders

Set Anchor Buttons in Protocols

- The new accordion button setup in the EHR allows more room for anchor buttons in the visit protocol.

- Anchor buttons can be used to move through the chart without scrolling. They also help to jump to a particular part of the chart if needed.

Anchor Buttons in Protocol

Task Column on Schedule Screen

- The task column can be used along with the visit task queue to review pending tasks. The task column will show all pending tasks for a patient.

- The task column has four statuses:
  - Blank: no items have been ordered for this patient
  - Orange ball: there are pending items for today's visit
  - Orange ring: there are still pending items, but they will not be completed today (ex. an overnight culture) In order for the orange ring to show, the 'tasks for today' box must be unchecked
  - Green check: all tasks for the patient have been completed

Orange Ball on Schedule Screen

Tasks for Today Check box

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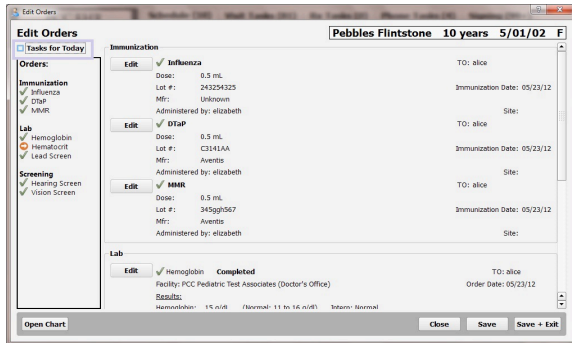
Orange Ring on Schedule Screen

Pediatric Software Just Got Smarter. Your Practice Just Got Healthier.
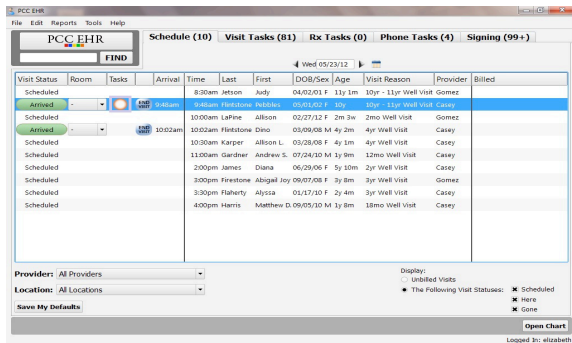
Utilize the Subject Line on the Phone Note screen

- The phone note screen has a new optional field for a subject line.
- Any notes entered in the subject line will show in the visit history index to make it easier to find the historical phone note you want to review.
- If you previously used pen in Partner, PCC's development team can copy your subjects from your historical pen notes to PCC EHR.

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Subject Line on Phone Note Screen

Subject Line in Visit History Index

Subject Line on Phone Task Queue

Using Fake Patient in PCC EHR for Routing Internal Messages

- In your office there might be information that needs to be routed to someone else in the office, but that message is not associated with a particular patient.

- You can create a fake patient for routing these messages. The fake patient should be created in Partner and then you are able to create a phone note for them in the EHR.

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Creating Phone Note for Fake Patient
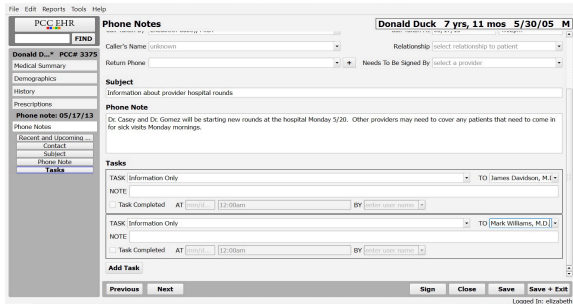
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Re-size Visit History Index and Filter Visit History

- The visit history can be filtered to show:
  - All items
  - Visits
  - Phone Notes
  - Unattached Documents
- The index can be re-sized so that you can see more or less items in the list without scrolling.

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Larger Visit History Index

Smaller Visit History Index

Filter Visit History

Entering Dates for Documents in Import Documents Screen

- Entering dates and notes for documents on the Import Documents screen makes it easier to find a document in the patient's chart.

- Documents with a date will sort in chronological order, but any documents that do not have a date will sort to the bottom of the list of documents.

- Notes can be helpful, for example, you could write a note listing what type of lab result is included on that document.

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Documents in Patient's Chart

File Edit Reports Tools Help

PCC EHR [FIND]

Documents   Pebbles Flintstone 10 years 4/24/03 F

Pebbles Fli... PCC# 3336
Medical Summary
Demographics
History
  Visit History
  Immunization History
  Flowsheets
  Growth Charts
  Documents
Prescriptions
Visit: 05/17/13
9-10 Yr Well - Bright Futu...

▶ Demographics (2)
▶ General (1)
▶ Hospital (1)
▶ Insurance/Billing (1)
▼ Visit Note (2)

Visit Note (1 Page)   Date: 04/30/12
Attached to: 04/30/12 - 9-10 Yr Well - Bright Futures

Visit Note (1 Page)   Date: 04/27/11
Note: They go here! [mark]
Attached to: 04/27/11 - 9-10 Yr Well - Bright Futures

Print   Edit Tags   View Document   Add Phone Note   Close   Save   Save + Exit
Logged In: elizabeth

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Hide Lab Orders from Patient Reports

- Any item that is ordered in any order component will now have a check box: Include on Patient Reports. This check box will be selected by default.

- When this check box is unchecked, the order will be hidden from the Patient Visit Summary and the Health Information Summary.

- For labs, the lab configuration tool allows you to configure a specific lab to be hidden by default.

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Configure Hidden Lab in Lab Configuration Tool
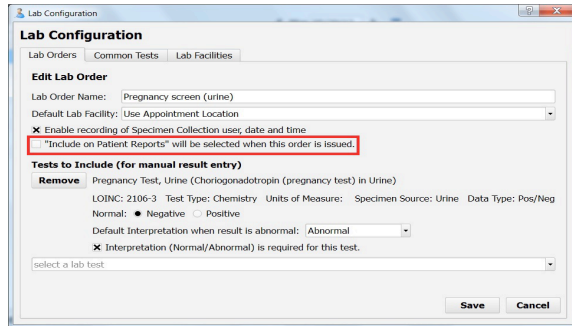
Configure Hidden Lab in Lab Configuration Tool
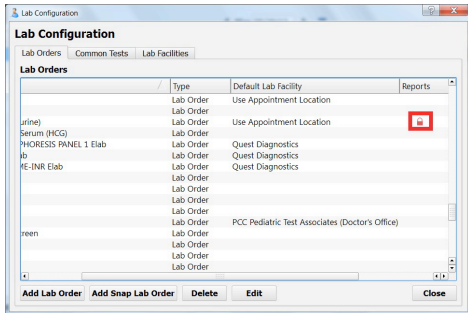
Create 'Chart Check' Visit Reason to use as a Reminder on the Schedule

- If there is a patient that needs a follow-up phone call in a couple of weeks or a month, you can have your front desk schedule a 'Chart Check' visit so that you will have a reminder on your schedule screen.

- The new visit reason can be created in Partner.

- In your protocols, you can create an item in the Followup order component called 'Create Chart Check Visit' that can be tasked to your front desk.

- When following up with the patient, you can create a phone note for any notes from the call.
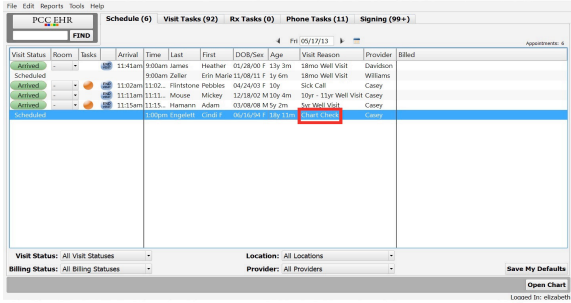
Chart Check Visit on Schedule Screen

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Appointment Notes on Chart Check Visit

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Creating Phone Note for Chart Check Visit

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Use Phone Note for Chart Updates

- There are times when you may need to update a patient's chart when they are not in for a visit. The reason could be that they were seen in the hospital, or that you spoke with the patient or parent on the phone.

- In these cases, you can use a phone note to add an update to the patient's chart without creating a visit.

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Create a Phone Note for Chart Updates

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Chart Update Phone Note in Visit History

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Optimizing the Electronic Encounter Form

- The Electronic Encounter Form (EEF) is a great way to streamline billing and can help your practice capture more incidental charges.

- There a couple of ways you can optimize the EEF:
  - For procedures such as Nebulizer Treatments, set all billing codes (procedure, mask, tubing, medication) to bill by default so that one is not missed.
  - When adding immunization administration codes or injection billing codes to the EEF, create multiple entries in Partner so units will show correctly.

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Configure All Billing Codes for Procedures

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Create Multiple Immunization Administration Procedures in Partner

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Create Multiple Immunization Administration Procedures in Partner

Administration Codes on EEF Editor

Administration Codes on Bill Screen in Visit

Save Documents Directly to PCC EHR

- When your office logs into a portal for the hospital or lab vendor for lab results, it is possible to save those documents as a PDF directly into PCC EHR so that you don't need to print the result and then scan them into the EHR.

- If you are interested in this option, our Hardware team can help setup this option on your workstations.

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Providing Patient Records

- When a patient sends a request to have their records transferred to another physician, you have the option to save the documents directly to a CD so that you don't have to print and scan the documents.

- In the Visit History, click on the Print button and choose a PDF printer, this will open a Save dialogue box and you can choose the CD drive.

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Save Documents Directly to PDF
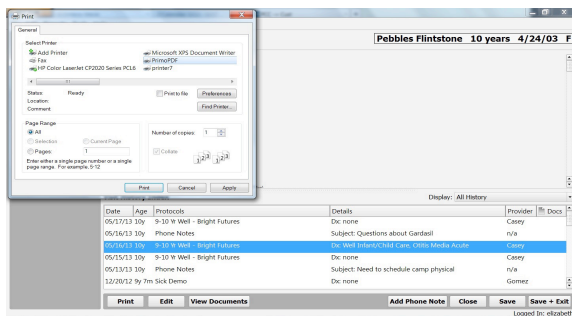
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Designate a 'Super Trainer'

- The PCC EHR is constantly changing as we add new, exciting features. We hold weblabs for the new release the Wednesday, Thursday and Friday before the update to show the new features and answer any questions.

- Designating a person (or a couple of people) who can attend the weblabs for each release and then disseminate that information to the office will help you take advantage of all the new functionality in PCC EHR.

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On-line Resources

- PCC EHR on-line documentation and videos at: http://learn.pcc.com

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Questions?

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