

# 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

PCC Health  
Pebbles Flintstone 10 years 4/24/03  
Appointment: Sick - Bright Future

**Auto-Notes Configuration**  
 Clinical Alerts Editor  
 Document Category Editor  
 Encounter Form Editor  
 Growth Chart Configuration 2am  
 Immunization Configuration 2am  
 Lab Configuration  
 Protocol Configuration  
 Delete Charted Visit  
 Main Office  
 Import Documents Administration  
 Practice Preferences  
 User Administration

**Informant/Relationship**

**Chief Complaint**

**Vitals**  
 Weight:  lbs  oz  
 Height:  in

Previous Next Bill Sign Close Save Save + Exit

Logged In: elizabeth



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## Auto-Notes Configuration

**Auto-Notes Configuration** Protocol: Sick - Bright Futures User: Practice Defaults

**Physical Exam**

**General Appearance**  
 ABN Practice Default:   
 NL Practice Default: alert, active, no distress  
 N/E Practice Default:

**Head**  
 ABN Practice Default:   
 NL Practice Default: atraumatic, normocephalic  
 N/E Practice Default:

Cancel Save Save + Exit



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## 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.



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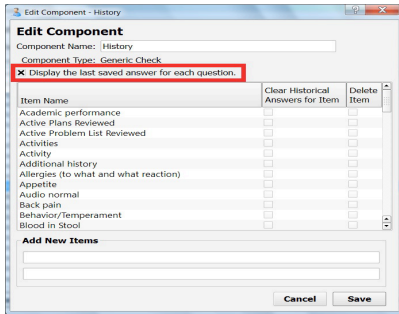
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## Configuring Last Saved Answer



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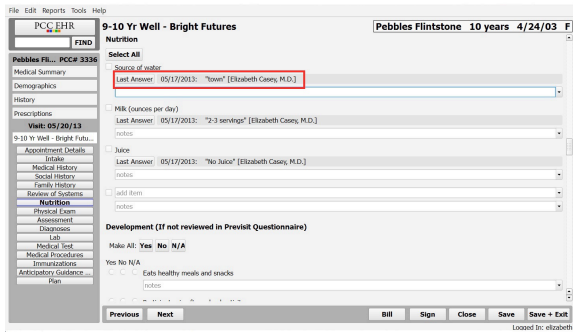
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## Last Answer Check Box Component



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## 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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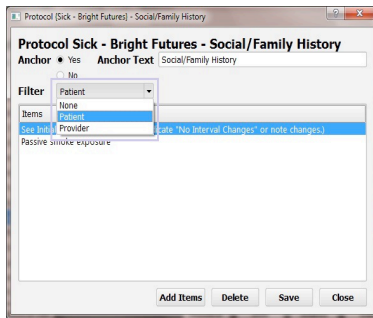
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## Set Memory in Configuration Tool



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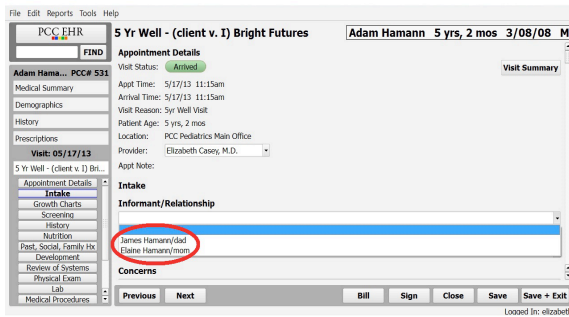
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## Smart Box in Protocol



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## 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).



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## Lab with additional task

File Edit Reports Tools Help

PCC EHR **9-10 Yr Well - Bright** **Pebbles Flintstone 10 years 4/24/03 F**

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

**Lab**

**DETAILS**

**EDIT** Hemoglobin Ordered TO: anita  
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**  
Order: select a screening

Previous Next Bill Sign Close Save Save + Exit  
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## Deleting additional task

File Edit Reports Tools Help

PCC EHR **9-10 Yr Well - Bright** **Pebbles Flintstone 10 years 4/24/03 F**

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**

**DETAILS**

**EDIT** Hemoglobin Ordered TO: Anita Sharp  
Facility: PCC Pediatric Test Associates (Doctor's Office) Order Date: 05/17/13  
Specimen Collected: By: [select user name] [mm/dd/yyyy] [12:00 AM]

Test Result Units Reference Range Interpretation ALL NORMAL  
Hemoglobin [select] 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 [X] Include on Patient Reports [ ]

TASK [enter task name] TO [ ]  
NOTE [enter task notes here]

Task Completed AT [mm/dd/yyyy] [12:00am] BY [enter user name]

ADD TASK DISCARD CHANGES SAVE ORDER

**Order** Hematocrit

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



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## Lab without additional task

File Edit Reports Tools Help

PCC EHR **9-10 Yr Well - Bright** **Pebbles Flintstone 10 years 4/24/03 F**

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

**Lab**

**EDIT** Hemoglobin Ordered TO: anita  
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  
Loaded 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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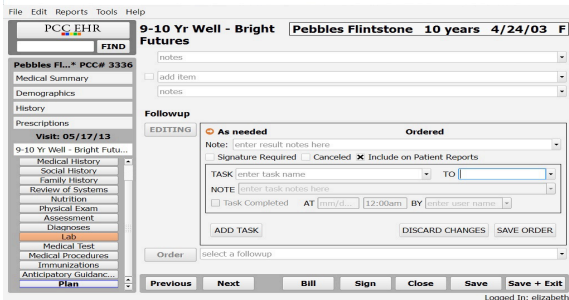
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## Removing Task from Order



File Edit Reports Tools Help

PCC EHR

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

**Futures**

notes

add item

notes

**Followup**

As needed  Ordered

Note: [enter result notes here]

Signature Required  Canceled  Include on Patient Reports

TASK [enter task name] TO [ ]

NOTE [enter task notes here]

Task Completed AT [mm/dd] 12:00am BY [enter user name]

ADD TASK DISCARD CHANGES SAVE ORDER

Order: select a followup

Previous Next Bill Sign Close Save Save + Exit

Loaded In: elizabeth

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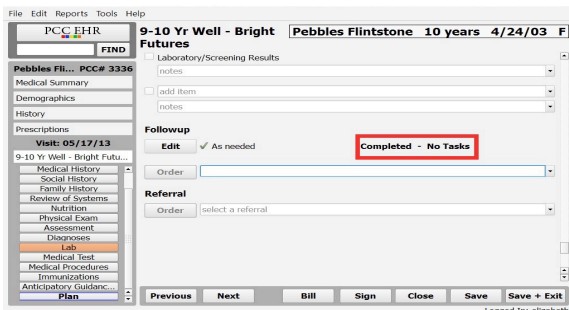
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## Order without any tasks



File Edit Reports Tools Help

PCC EHR

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

**Futures**

Laboratory/Screening Results

notes

add item

notes

**Followup**

Edit  As needed **Completed - No Tasks**

Order: [ ]

**Referral**

Order: select a referral

Previous Next Bill Sign Close Save Save + Exit

Loaded In: elizabeth

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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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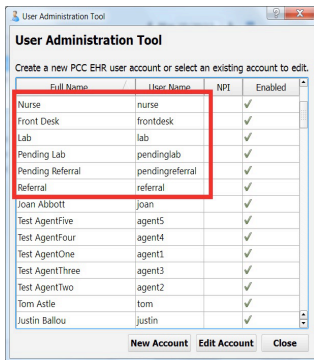
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## User Groups in User Administration Tool



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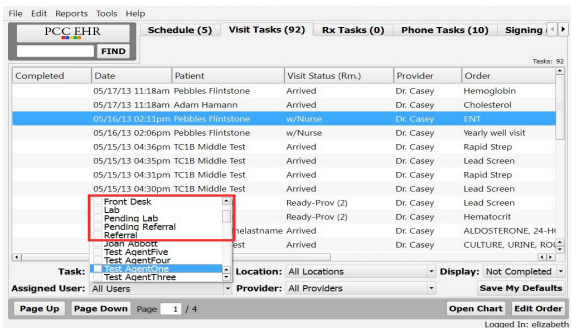
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## User Groups on Visit Task Queue



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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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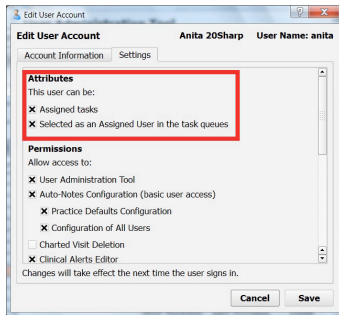
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## New User Attributes in User Administration



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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

The screenshot shows the PCC EHR interface. At the top, there are tabs for 'Schedule (5)', 'Visit Tasks (4)', 'Rx Tasks (0)', 'Phone Tasks (10)', and 'Signing (1)'. Below the tabs is a search bar with the word 'FIND' and a 'Tasks: 4' indicator. A table displays a list of tasks with columns for 'Completed', 'Date', 'Patient', 'Visit Status (Rm.)', 'Provider', 'Order', and 'Task'. The tasks listed are:

Completed	Date	Patient	Visit Status (Rm.)	Provider	Order	Task
	05/13/13 09:36pm	Alison A. Sabino	Arrived	Dr. Gomez	DTaP	Immunization
	05/13/13 09:33pm	Mattayha Tipton	Arrived	Dr. Casey	DTaP HIB	Immunization
	05/13/13 09:32pm	Ashlyn Baird	Arrived	Dr. Davidson	DTaP HIB	Immunization
	05/13/13 02:41pm	Jose M. Wilson	Arrived	Dr. Casey	Cerumen Removal	Complete Tasti

Below the table is a dropdown menu for selecting users. The menu is open, showing a list of users with checkboxes. The selected user is 'Elizabeth Casey, M.D.'. Other users listed include 'James Davidson, M.D.', 'Fred Jones, M.D.', 'Kathleen W. Gomez, M.D.', 'Mark Williams, M.D.', 'Alfred Woodward, M.D.', and 'Alicia Normand'. Below the dropdown, there are fields for 'Assigned User: 10Casey\_zunurse', 'Location: All Locations', 'Display: Not Completed', and 'Provider: All Providers'. At the bottom, there are buttons for 'Page Up', 'Page Down', 'Page 1 / 1', 'Open Chart', and 'Edit Order'. The status bar at the bottom indicates 'Loaded In: elizabeth'.



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## 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.



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## Medical Summary Builder in Configuration Tool

The screenshot shows a window titled 'Protocol Configuration'. Inside the window, there is a list of options for building protocols:

- Protocol Builder
- Component Builder
- Protocol Map
- Medical Summary Builder (highlighted)
- Demographics Builder

At the bottom right of the window is a 'Close' button.



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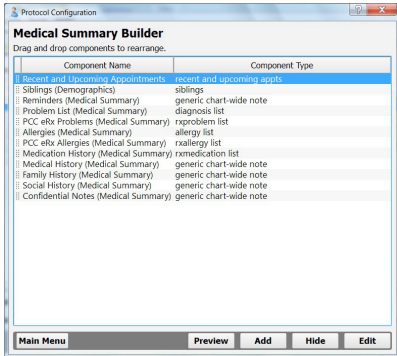
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## Configuring Medical Summary Screen



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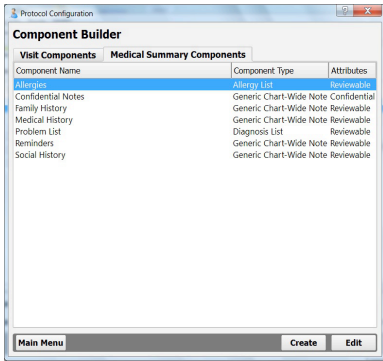
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## Create New Medical Summary Components



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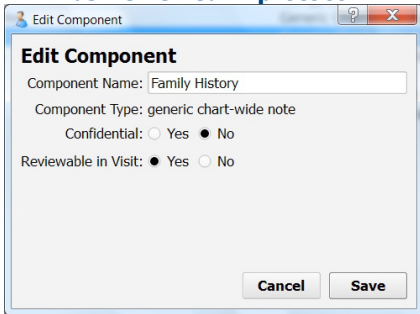
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## Allowing Medical Summary Components to be Reviewed in protocol



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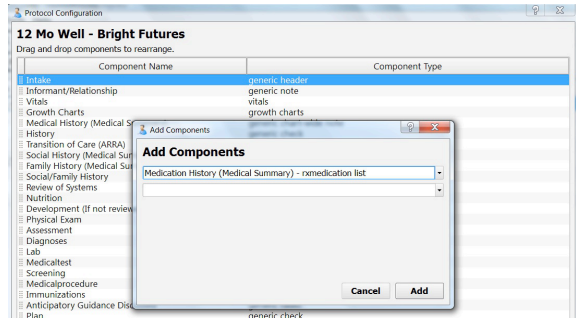
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## Add Medical Summary Components to Protocol



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## Medical Summary Components in Protocol



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## 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.



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## Opening Multiple Siblings' Charts

File Edit Reports Tools Help  
PCC EHR  
FIND  
Pebbles Flintstone PCC# 3336  
Medical Summary  
Recent and Upcoming Appointments  
Last Visit: 05/16/13 (1d ago) Dr. Casey  
Diagnoses: Well Infant/Child Care, Otitis Media Acute  
Last Physical: 05/01/12 (1y ago)  
Next Physical Due: 05/01/13 (10d overdue)  
Scheduled Appointments: none  
Siblings  
Open Chart: Dino Flintstone 4 yrs, 2 mos 03/02/09 M  
Reminders Modified 05/13/13  
Headed to regional soccer championships 10/11.  
Lost best friend to a neighborhood house fire in 12/10.  
Problem List Modified 05/16/13 Display: All Statuses  
Status Problem Problem Note Onset Resolved  
Resolved Urinary Tract Infection (599.0) 02/18/07  
Active Obesity Exogenous (278.00)  
Active Asthma Mild Persist (493.00)  
Edit Add Phone Note Close Save Save + Exit  
Loaded In: elizabeth



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## Multiple Charts Open

File Edit Reports Tools Help  
PCC EHR  
FIND  
Dino Flintstone PCC# 3335  
Medical Summary  
Recent and Upcoming Appointments  
Last Visit: 03/05/12 (1y 2m ago) Dr. Casey  
Diagnosis: Well Infant/Child Care  
Last Physical: 03/05/12 (1y 2m ago)  
Next Physical Due: 03/11/13 (2m overdue)  
Scheduled Appointments: none  
Siblings  
Open Chart: Pebbles Flintstone 10 years 04/24/03 F  
Reminders No Saved Notes  
Problem List Modified 05/15/13 Display: All Statuses  
Status Problem Problem Note Onset Resolved  
Resolved Obstructed Nasolacrimal Duct (375.55)  
Allergies Modified 05/15/13 Display: All Statuses  
Status Allergy Reaction Onset Resolved  
Edit Add Phone Note Close Save Save + Exit  
Loaded In: elizabeth



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## 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.



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## Copy Family History Notes

**Medical Summary** Pebbles Flintstone 10 years 4/24/03 F

Status Allergy Reaction Onset Resolved  
Active Allergy Cat Hair (477.8)

**PCC eRx Allergies** Updated 05/17/13 11:24 AM  
Drug Reaction Onset

**Medication History** Updated 05/17/13 11:24 AM Display: All Statuses  
Active Drug Formula Details

**Medical History** Modified 05/16/13  
Notes here.

**Family History** Modified 05/16/13  
Mom had stroke at age 25. Copy Family History to Siblings

**Social History** No Saved Notes

**Confidential Notes** Modified 05/16/13

Edit Add Phone Note Close Save Save + Exit



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## Copy Medical Summary Notes to Sibling

**Medical Summary** Pebbles Flintstone 10 years 4/24/03 F

Status Allergy Reaction Onset Resolved  
Active Allergy Cat Hair (477.8)

**PCC eRx Allergies** Updated 05/17/13 11:24 AM  
Drug Reaction Onset

**Medication History** Updated 05/17/13 11:24 AM Display: All Statuses  
Active Drug Formula Details

**Medical History** Modified 05/16/13  
Notes here.

**Family History** Modified 05/16/13  
Mom had stroke at age 25.

**Social History** No Saved Notes

**Confidential Notes** Modified 05/16/13

Edit Add Phone Note Close Save Save + Exit



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## Copy Options for Notes

**Copy Medical Summary Notes**

From: Pebbles Flintstone 10 years 4/24/03 F

**Family History (Reviewable)**  
Mom had stroke at age 25.

To: Dino Flintstone 4 yrs, 2 mos 3/02/09 M

Append  Replace  Custom  Do Not Copy Notes for this Patient

**Family History (Reviewable)**  
Mom had stroke at age 25.

Back Save Cancel



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## 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

Diagnosis	Lab	Medical Test	Radiology	Screening	Vitals
Otitis Media Acute Active on Problem List					02/16/03 (15y)
West Intussusception Case Active on Problem List					02/16/03 (15y)
Immunization					02/17/03 (15y)
Conjunctivitis					02/19/03 (15y)
Adenoviral Pharyngitis Active on Problem List					02/20/03 (15y)
Otitis Media Acute Active on Problem List					02/20/03 (15y)
Otitis Media Acute Resolved on Problem List					02/21/03 (15y)
Otitis Media Acute Resolved on Problem List					02/21/03 (15y)
Otitis Media Acute Resolved on Problem List					02/21/03 (15y)
Otitis Media Acute Resolved on Problem List					02/21/03 (15y)



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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

File Edit Reports Tools Help

PCC EHR  
5 Yr Well - (client v. I) Bright Futures Adam Hamann 5 yrs, 2 mos 3/08/08 M

Immunization History

DTPa	02/02/08	07/11/08	10/02/08
HB	07/11/08		
Influenza	12/01/12		
IPV	05/03/08	07/11/08	12/06/08
MMR	06/06/09	03/10/12	
Varicella	03/07/09		
DTPa/HIB	06/06/09		
HepB/HIB	05/03/08	10/02/08	
Prevnar 7	06/06/09	09/03/09	
Ordered			

Immunization Orders

Order	Refuse	DTPa
Order	Refuse	IPV
Order	Refuse	MMR
Order	Refuse	Varicella
Order	Refuse	select an immunization

Previous Next Bill Sign Close Save Save + Exit

Loaded by: elizabeth



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## Default Orders

File Edit Reports Tools Help

PCC EHR  
18 Mo Well - Bright Futures Heather James 13 yrs, 3 mos 1/28/00 F

Lab

Order	Hemoglobin
Order	Hematocrit
Order	Lead Screen
Order	select a lab

Medical Test

Order	select a medical test
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Medical Procedure

Order	select a medical procedure
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Screening

Order	Hearing Screen
Order	Vision Screen
Order	select a screening

Previous Next Bill Sign Close Save Save + Exit

Loaded by: elizabeth



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## 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.



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## Anchor Buttons in Protocol

The screenshot shows a patient protocol interface for Heather James. The patient is 13 years, 3 months old, with a date of birth of 1/28/00. The protocol is for a 18 Mo Well - Bright Futures visit. The interface includes a left-hand menu with categories such as Lab, Medical Test, Medical Procedure, Screening, and Immunizations. Each category has an 'Order' button. The 'Immunizations' section shows 'Immunization History' with a note that there are no immunizations recorded for this patient. At the bottom, there are buttons for 'Previous', 'Next', 'Bill', 'Sign', 'Close', 'Save', and 'Save + Exit'. The user is logged in as 'elizabeth'.

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## 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

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## Orange Ball on Schedule Screen

The screenshot shows a schedule screen for Wednesday, 01/23/12. The schedule is filtered by 'Schedule (10)', 'Visit Tasks (83)', 'Rx Tasks (0)', and 'Signing (99+)'. A table lists the following visits:

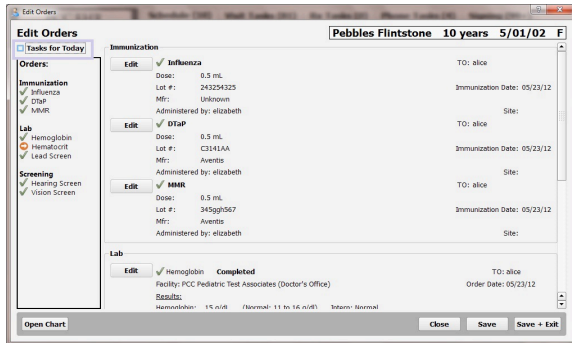
Visit Status	Room	Tasks	Arrival	Time	Last	First	DOB/Sex	Age	Visit Reason	Provider	Billed
Scheduled			8:30am	Jetson	Judy	04/02/01	F	11y 1m	10yr - 11yr Well Visit	Gomez	
Arrived		Orange Ball	10:02am	Hartstone	Allison	03/01/07	F	5y 1m	11yr Well Visit	Casy	
Scheduled			10:00am	Larive	Allison	02/27/12	F	2m 2w	2mo Well Visit	Gomez	
Scheduled			10:02am	Hartstone	Dino	01/09/08	M	4y 2m	4yr Well Visit	Casy	
Scheduled			10:30am	Karper	Allison L.	03/08/08	F	4y 1m	4yr Well Visit	Casy	
Scheduled			11:00am	Gardner	Andrew S.	07/24/10	M	1y 9m	12mo Well Visit	Casy	
Scheduled			2:00pm	James	Diana	06/29/08	F	5y 10m	2yr Well Visit	Casy	
Scheduled			2:00pm	Frestone	Abigail Joy	09/07/08	F	3y 8m	3yr Well Visit	Gomez	
Scheduled			3:30pm	Flaherty	Alyssa	01/17/10	F	2y 4m	3yr Well Visit	Casy	
Scheduled			4:00pm	Harris	Matthew D.	09/05/10	M	1y 8m	18mo Well Visit	Casy	

At the bottom, there are filters for 'Providers: All Providers' and 'Locations: All Locations'. There are also checkboxes for 'Display: Unbilled Visits' and 'The Following Visit Statuses: Scheduled, Here, Gone'. The user is logged in as 'elizabeth'.

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### Tasks for Today Check box




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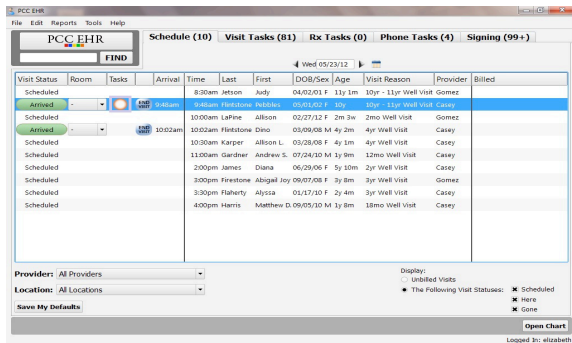
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### Orange Ring on Schedule Screen




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### 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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## 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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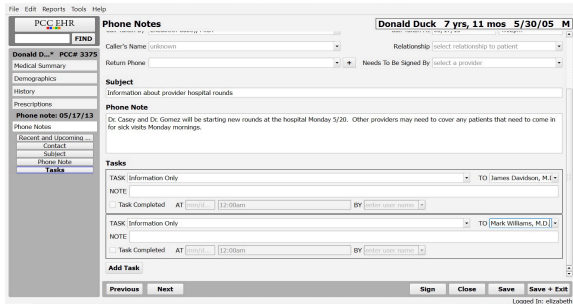
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## Creating Phone Note for Fake Patient



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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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## 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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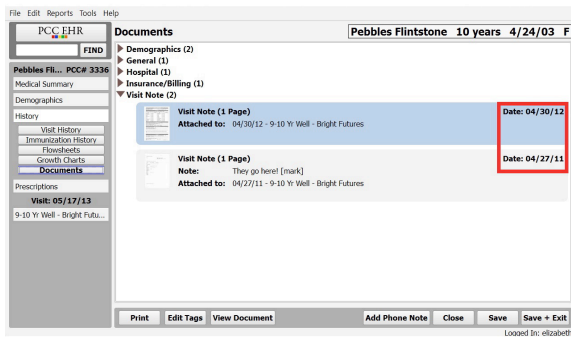
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## Documents in Patient's Chart



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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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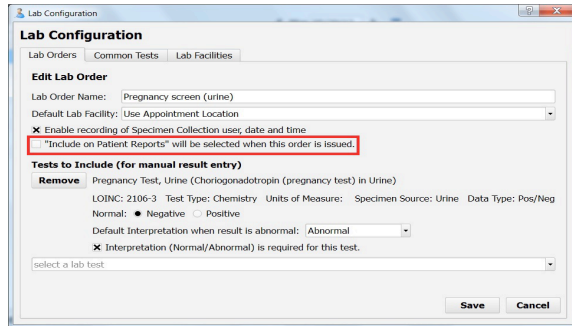
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## Configure Hidden Lab in Lab Configuration Tool




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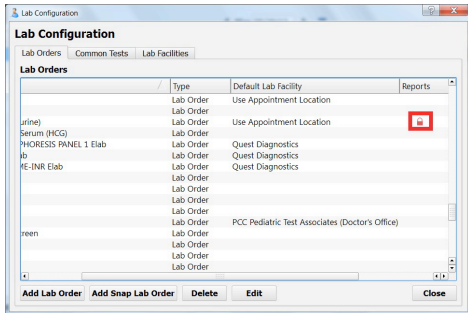
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## Configure Hidden Lab in Lab Configuration Tool




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## 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.

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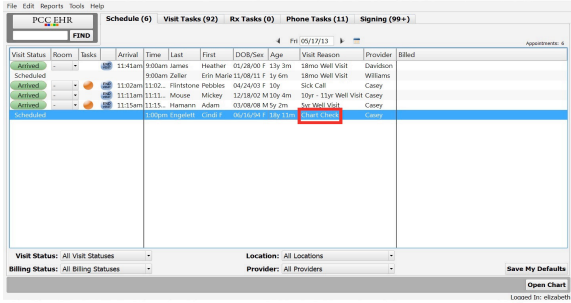
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## Chart Check Visit on Schedule Screen



Visit Status	Room	Tasks	Arrival	Time	Last	First	DOB/Sex	Age	Visit Reason	Provider	Eligible
Scheduled			11:41am		100am James	Headler	01/28/01 F 1y 3m	18mo	Well Visit	Dawson	
Scheduled			11:41am		100am Zeller	Edin Maria	11/06/11 F 3y 6m	18mo	Well Visit	Williams	
Active			11:02am		11:02am	FRITSTONE PREKLES	04/24/03 F 10y		Sick Call	Casey	
Active			11:11am		11:11am	Moosey	12/08/02 M 5y 4m	50y+	1st Well Visit	Casey	
Active			11:15am		11:15am	Hammann Adam	03/08/08 M 5y 2m		Sick Well Visit	Casey	
Scheduled					100am Engelett	Cindi F.	06/16/94 F 18y 11m		Chart Check	Casey	



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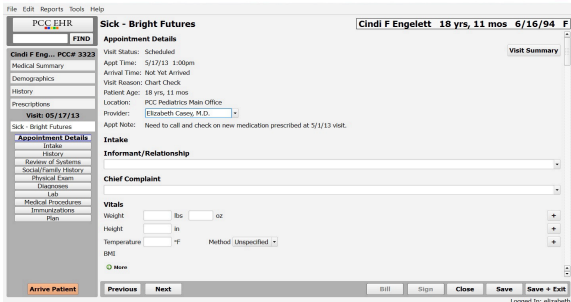
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## Appointment Notes on Chart Check Visit



**Sick - Bright Futures** **Cindi F Engelett 18 yrs, 11 mos 6/16/94 F**

**Appointment Details**

Visit Status: Scheduled  
Appt Time: 05/17/13 1:00pm  
Arrival Time: Not Yet Arrived  
Visit Reason: Chart Check  
Patient Age: 18 yrs, 11 mos  
Location: PCC Pediatrics Main Office  
Provider: Elizabeth Casey, M.D.  
Appt Note: need to call and check on new medication prescribed at 5/17/13 visit.

**Appointment Details**

Intake  
Informant/Relationship  
Chief Complaint  
Vitals  
Weight:  lbs  oz  
Height:  in  
Temperature:  °F Method: Unspecified  
BP:  /   
 None

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



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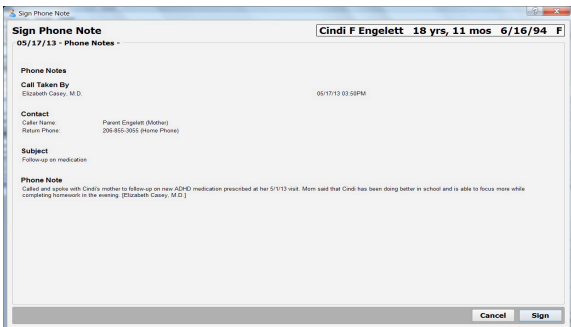
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## Creating Phone Note for Chart Check Visit



**Sign Phone Note** **Cindi F Engelett 18 yrs, 11 mos 6/16/94 F**

05/17/13 - Phone Notes -

**Phone Notes**

Call Taken By: Elizabeth Casey, M.D. 05/17/13 03:58PM

**Contact**  
Caller Name: Parent Engelett (Mother)  
Return Phone: 206-895-3655 (Home Phone)

**Subject**  
Followup on medication

**Phone Note**  
Called and spoke with Cindi's mother to follow-up on new ADHD medication prescribed at her 5/17/13 visit. Mom said that Cindi has been doing better in school and is able to focus more while completing homework in the evening. (Elizabeth Casey, MD)

Cancel Sign



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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 are 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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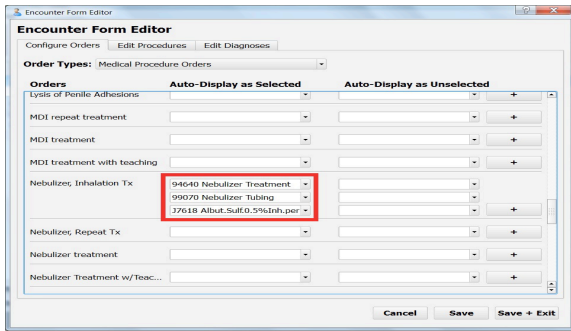
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## Configure All Billing Codes for Procedures



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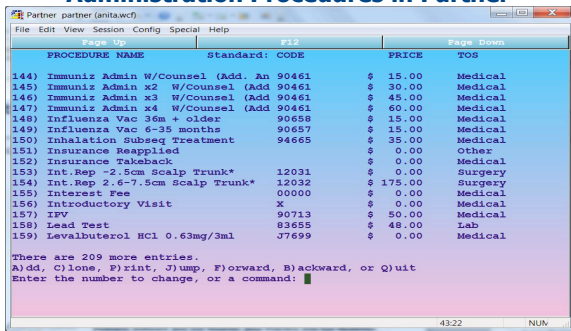
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## Create Multiple Immunization Administration Procedures in Partner



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## 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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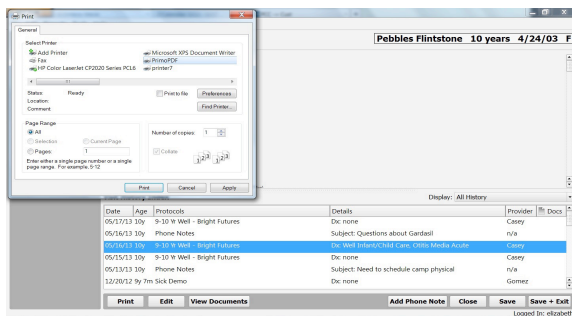
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## Save Documents Directly to PDF



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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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