Optimizing PCC EHR

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User's Conference 2017

Goal of this Course

- PCC EHR changes constantly and we are always adding new and exciting features that can help optimize your use of PCC EHR.
- This course will focus on some of the new PCC EHR functionality.

Add Patients/Accounts in PCC EHR

- It is now possible to add patients, add accounts and reassign accounts in PCC EHR!
- The Assign Account option is available in the patient demographic section
- The Add Patient or Add Account option is only visible after you have performed a search for a patient or account

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Add Patient

Add Patient

Add Patient

Demographics

Han Solo Jr   28 years

Patient Demographics

Han Solo Jr
Date of Birth: 05/16/89
Sex: Male

Birth History
GA at Birth: Undetermined
Multiple Birth: Undetermined

Race, Ethnicity, and Preferred Language
Race:
Ethnicity:
Pref. Language:

Patient Information
Patient Flags:
PCP:
SSN:
School:
Alt Name:
Chart #:
Relation to Bill Payor:

Communication Preferences

Patient's Confidential Communication Preference
No Preference

Account Demographics

Home and Billing Account
Fred Flintstone (Account # 1980)

Address
1400 Rock Road
Winooski,VT05404

Phone
Primary: 802-555-0105
Secondary: 802-555-0146
Text Phone: 802-555-0112
Emg Phone:

Account Information
Account Flags: Billing Problem
EMG Contact: Wilma
EMG Phone #:   802-991-9911
Alt Last Name:
Mother SSN: 134-334-8932
Father SSN: 567-127-4815
Pharmacy #:

Recent Financial History
Last Service: 12/22/16
Last Bill Sent: 04/23/17

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Reassign Patient Account(s)

Add New Account

Add New Account

Reassign Account Options

Auto-calculated Well Codes for Billing

- The additional procedure section of the Electronic Encounter Form can utilize auto-calculated well codes
- Auto-calculated codes are available for modified codes and non-modified codes
- Lists correct code based on the age of the patient

Auto-calculated Well Codes for Billing

Est Pt Well w/o Imms
☐ 99393 Well Child 5-11 yrs

Est Pt Well
☐ 99391 Well Child Under 1 yr
☐ 99392 Well Child 1-4 yrs
☐ 99393 Well Child 5-11 yrs
☐ 99394 Well Child 12-17 yrs
☐ 99395 Well Child 18-39 yrs

New Pt Well w/o Imms
☐ 99383 New Pt Well Child 5-11 yrs

New Pt Well
☐ 99381 New Pt Well Child Under 1 yr
☐ 99382 New Pt Well Child 1-4 yrs
☐ 99383 New Pt Well Child 5-11 yrs
☐ 99384 New Pt Well Child 12-17 yrs
☐ 99385 New Pt Well Child 18-39 yrs

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Hiding Orders from Patient Reports

- When configuring orders in the EHR it is possible to hide particular items from patient reports (patient visit summary, visit history and patient portal).
  - Example: sensitive labs
- When the order is placed in the visit, there is also the option to hide for that patient specifically
- Changing the default under the configuration automatically hides that order for every patient

Hiding Orders from Patient Reports
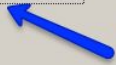
Hiding Diagnoses and Family Medical History from Patient Reports

- Diagnoses (both from the problem list and visit note) can be hidden from patient reports
- Diagnoses and family medical history SNOMED codes can be hidden from patient reports by default in Diagnosis Configuration
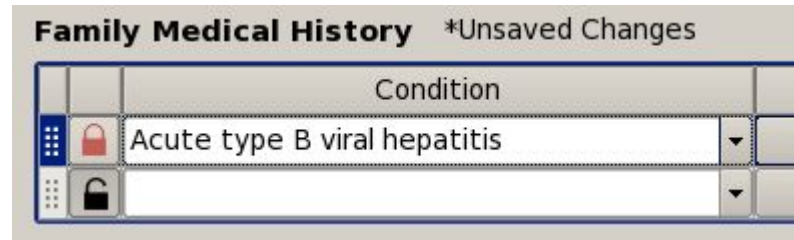
Hide Problem List Diagnoses

Hide Family Medical History Diagnoses

Hide Visit Diagnoses

Hide Diagnoses in Diagnosis Configuration

Confidential Notes

- Notes typed into confidential notes chart-wide component do not print anywhere in the chart or on patient-facing reports
- Use in adolescent protocols for more sensitive notes

Confidential Notes

○ ○ ○ History of recurrent joint pain or fractures

| notes | ▼ |

○ ○ ○ History of palpitations, chest pain, faintness, passing out

| notes | ▼ |

○ ○ ○ | add item | ▼ |

| notes | ▼ |

▼ **Confidential Notes (Chart-wide)** *Unsaved Changes   Editing

Any notes typed in this box will not print on any reports or with the visit history

Changes to Documents in PCC EHR

- When attaching a document to a patient's chart it is now possible to create a task from the Import Documents screen
- Tasks will be visible on the Messaging queue and in the patient's chart when viewing the document
  - If you look at the document in the Documents screen, the tasks will be visible
  - If a document is set to show in the Visit History Index, it will show that tasks are associated with the document
  - If a document is attached a visit, the document view in the visit will show that tasks are associated with the document
- If a document has been set to require a provider's signature, the document can now be signed from anywhere the document is viewed, not just on the signing list

Create Task for Document in Import Documents

Document Task in Messaging Queue

Viewing Document Task

Patient Demographics Included

Task Visible in Documents Screen

Edit/Sign Document

Show Documents in the Patient Portal

- When importing a document to a patient's chart you can choose to show the document in the patient portal
- Fill out the Title note box so that the document in the portal will have a label

Tags

Title

Lab results

Category

Lab

● **Attach Document**

06/04/16, Sick - Bright Futures

Lab - Influenza A/B

select an order

○ **File as Unattached Document**

Document Date:

☐ Display in the Visit History Index

Needs to be Signed by Provider:

select a provider

☒ Make available in the patient portal

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Documents From Parents/Patients in Patient Portal

- Parents/Patients can now attach PDF or JPG files to patient portal messages
- These documents will appear attached to the portal message in Messaging screen

Parent/Patient Attaches Document

Document Visible in Messaging Queue

Edit Document Attached to Portal Message

Title

IMG_2637.jpg

Category

Portal Message Attachments ▼

● **Attach Document**

06/13/17, Portal Message ▼

There are no orders for this visit.

○ **File as Unattached Document**

Document Date: [　　　]

☐ Display in the Visit History Index

Needs to be Signed by Provider:

select a provider ▼

☐ Display in Portal Documents

Document will be visible to all portal users
attached to the patient.

Note (Internal use)

[　　　　　　　　　　　　]

▼ **Tasks**

Task:

select a task ▼

To:

select a user ▼

Note:

Map Multiple ICD 10 Codes to SNOMED Code

- Map multiple, optional ICD 10 codes to a SNOMED code under Billing Configuration
- When selecting the SNOMED diagnosis in the visit, you can choose the ICD 10 code(s) to bill

Map Multiple ICD 10 Codes to SNOMED Code
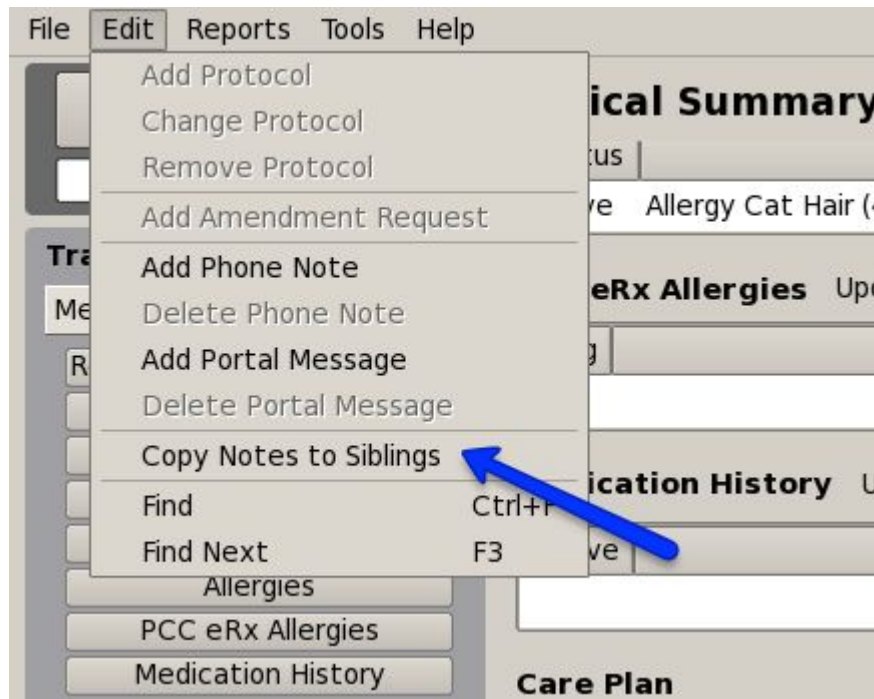
Map Multiple ICD 10 Codes to SNOMED Code

Copy Medical Summary Notes to Siblings

- The following components on the medical summary can be copied between siblings:
  - Medical History, Social History, Family Medical History, Reminders
- There are two options to access the option to copy notes:
  - Click Edit>Copy Notes to Siblings
  - Right-click on the component you want to copy

Copy Medical Summary Notes to Siblings

Copy Medical Summary Notes to Siblings

Copy Medical Summary Notes to Siblings

Access Problem List Diagnosis when Charting Visit

- With the diagnosis flowsheet it is important to consistently choose the same version of a diagnosis code
- The diagnosis component in the visit will access the problems on the problem list for selection when diagnosing the patient in the visit

Fenton Preterm Growth Charts

- PCC EHR now includes the Fenton preterm growth charts
- Enter the gestational age at birth in the patient's demographics screen
- If the gestational age is less than 37 weeks, the preemie growth charts will automatically appear
- The preterm growth chart will display until the patient is 50 weeks old (starting from their gestational age at birth)

Fenton Preterm Growth Charts
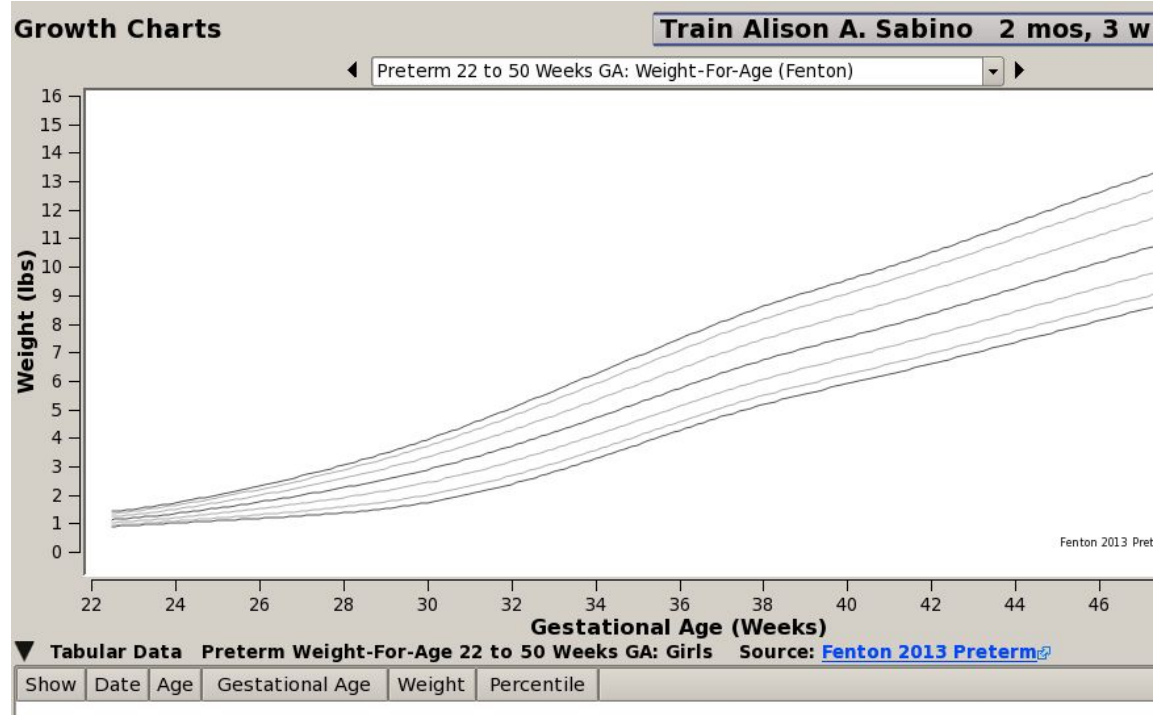
Down Syndrome Growth Chart

Down Syndrome Growth Chart
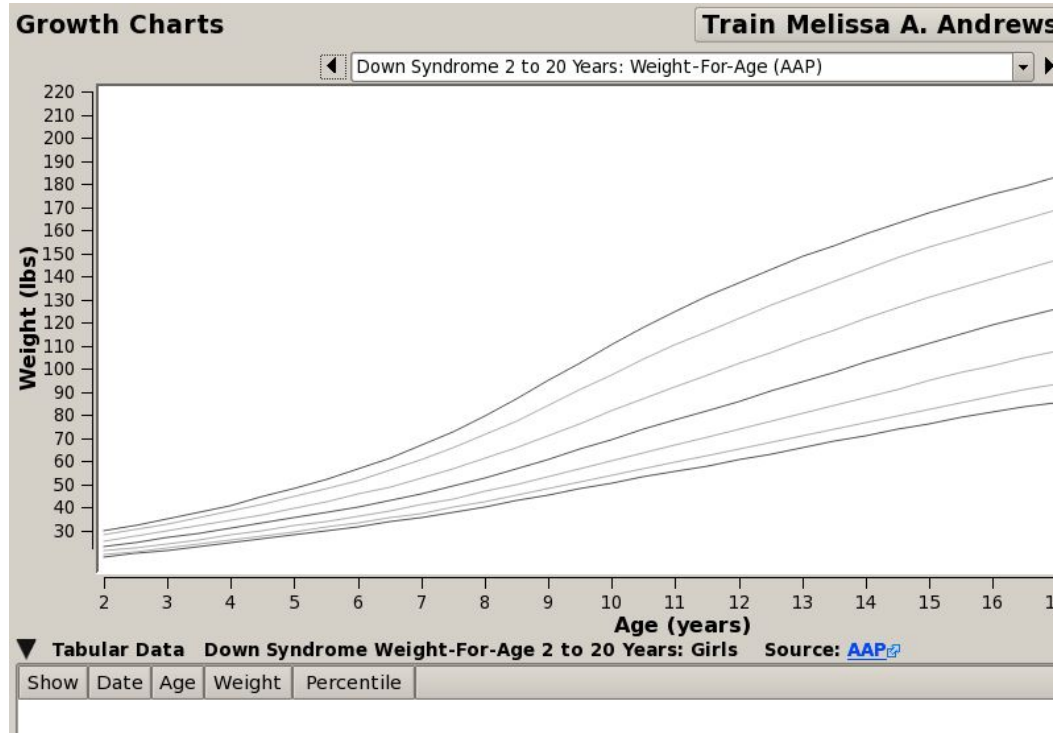
Reverting Status to Scheduled from Arrived

- If a patient is checked in by mistake or if the 'Arrive Patient' button is clicked in the EHR the patient's status can be reset to Scheduled
- The Revert to Scheduled option can be found under the Edit menu
- It will change the patient's EHR status to Scheduled and it will also move them back to the checkin screen in Partner
- If orders have been placed in the EHR, the Revert to Scheduled option will no longer be available

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Reverting Status to Scheduled from Arrived

Organize Assigned User Drop Down List

- Under Tools>User Administration there is a User Selection List option
- Using this tool you can organize the Assigned User drop down lists on the visit task and messaging queues
- This organization will not reflect when picking a user inside a visit

Organize Assigned User Drop Down List

Send Patient Education Materials to Patient Portal

- When accessing patient education for a patient, click Save As Document to attach the information to the patient's chart and also send it to the patient portal.

Send Patient Education Materials to Patient Portal

List of 10 Previous Patients

- The drop down arrow to the right of the patient finder box will show the previous 10 patients you worked with
- The list of patients is user specific
- Patients are added to that list for a number of reasons
  - Opened their chart - either from the schedule screen or from patient finder
  - Opened a messaging or visit task
  - Signed something for that patient
  - Attached a document
  - Attached an eLab

List of 10 Previous Patients
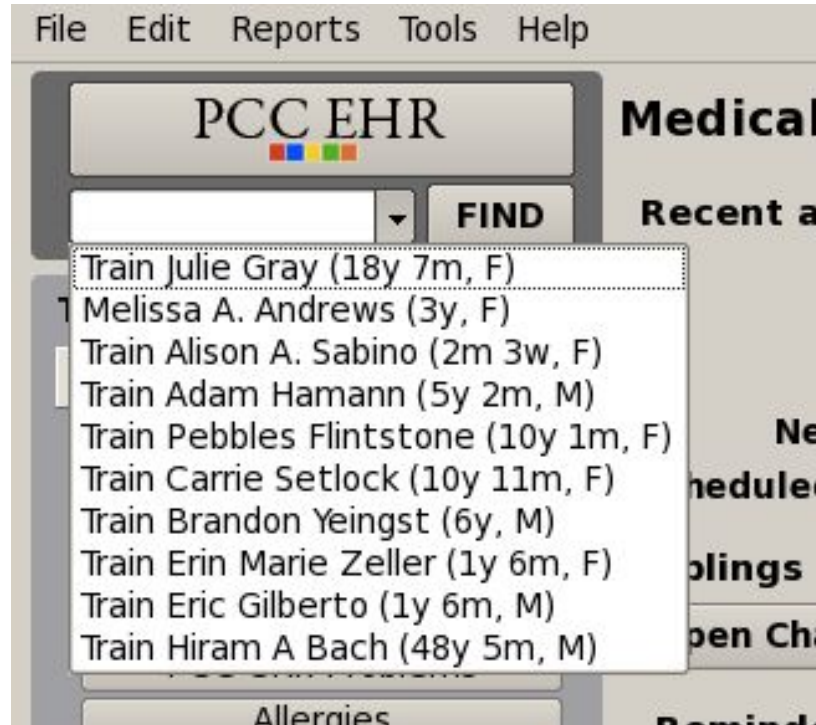
Additional Patient Information

- The string of patient information in the top right hand corner of the patient's chart and other screens is now clickable.
- The drop down will show the patient's most recent weight and their PCP

Train Julie Gray   18 yrs, 7 mos   10/21/97   F

Weight: 130 lbs (58.967 kg)   61st percentile(CDC)
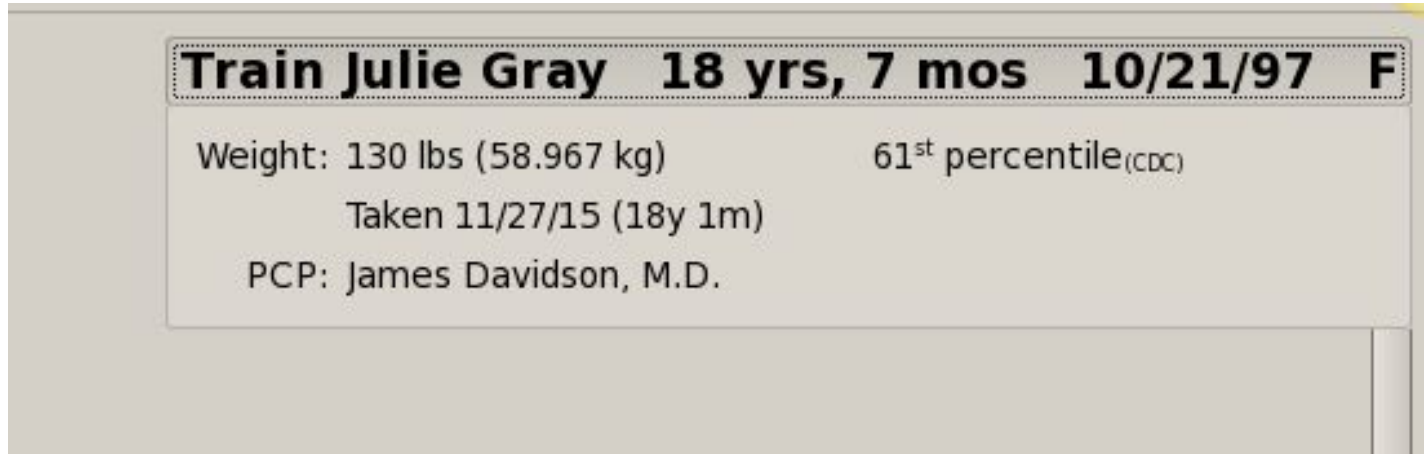
Taken 11/27/15 (18y 1m)

PCP: James Davidson, M.D.

Configure Patient Visit Summary

- Tools>Patient Visit Summary Configuration allows your practice to configure the data that shows on the printed visit summary
- It is possible to add note components from the visit, for example plan, so that the notes print on the visit summary
- For those using the patient portal, there is now a Patient Portal Configuration Tool that allows you to show plan notes on the portal

Configure Patient Visit Summary

Configure Patient Visit Summary

Visit Summary for 06/17/16

Mark Williams, M.D.
PCC Pediatrics Main Office
Sick - Pirate Peds

Plan
Supportive Care
Lots of fluids, change toothbrush, Tylenol for pain

PCC EHR Audit Log

- The new PCC EHR Audit Log shows more detail about chart access and modification
- Criteria can be set to look at a particular patient, a particular reporting period, by a particular PCC EHR user and look for a particular event (login, modification, etc)

PCC EHR Audit Log

PCC EHR Audit Log

Find Other Diagnosis

- The drop down list available in the problem list and the diagnosis component in the visit shows only a favorite list of diagnoses
- To search the full list: right click on either the problem list of the diagnosis component and select the Find Other Diagnosis option
- Once the full list has opened you can search based on SNOMED description or based on ICD 10 code or description

Find Other Diagnosis

Personal Contacts

- Personal Contacts is the only portion of the patient demographics screen that is EHR-only
- Additional contacts for the patient can be added with contact information and notes
- Can be used to list the other parent, if only one is listed under the accounts section

Personal Contacts

Personal Contacts have not been entered.

select a personal contact

Add Patient Contact
Kevin Setlock (Custodian)

Primary Insurance   Secondary Insurance

Personal Contacts

Vaccine-Preventable Diseases

- The Immunization History section of the chart and the immunization order component will list vaccine-preventable diseases
- The disease is added manually to the immunization section if it is diagnosed in a visit or added to the problem list

Status	Problem
Active ▼	Bronchiolitis
Active ▼	Asthma
Active ▼	Eczema
Active ▼	Varicella|
Active ▼	

☒ Varicella

Refine the diagnosis of Varicella

ICD-10: B01.9 Varicella without complication

notes

☐ Add to Problem List   Onset: mm/dd/yy   Problem Note: problem note

Vaccine-Preventable Diseases

Varicella	03/29/12	
DTaP/HIB	06/28/12	
HepB/HIB	05/26/11	10/25/11
Prevnar 7	06/28/12	09/25/12
Ordered		
Diseases		
Varicella	06/17/16	*date unknown*

Configure Visit Statuses

- The Visit Status Configuration tool can be used to:
    - Add new visit statuses
    - Change the color of visit statuses
    - Set which statuses are part of the click rotation on the schedule screen

Visit Status Configuration Tool

Add New Visit Status

Visit Status Options on Schedule Screen

Choose Visit Status Counters in My Account

Visit Status Counters in the EHR
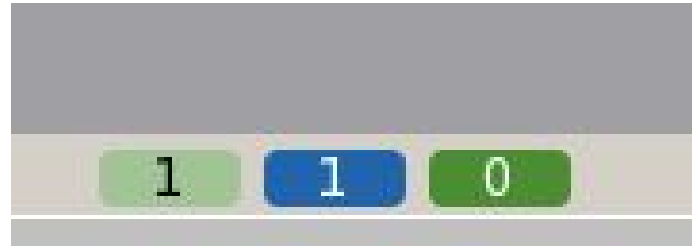
Designate a "Super Trainer"

- PCC EHR is constantly changing as we add new, exciting features. We hold weblabs for the new releases the Wednesday and Thursday 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.

On-Line Documentation

- PCC EHR on-line documentation is available 24/7 at: learn.pcc.com

Questions?