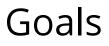
Getting the most out of your Client Advocate

Nirav Shah Jen Perren 2019 Users' Conference Burlington, VT







• Be able to identify the purpose of and services that PCC Client Advocates provide to our clients

• Determine how to incorporate and utilize those services, based on the needs of your practice





What is a Client Advocate?

- Integral piece of PCC's support services PCC's primary goal: To remove the obstacles that pediatricians face so that they can practice medicine.
 - Regular point of contact and liaison between clients/PCC
 - Proactive approach to issues





Functions of a PCC CA

- Regular check-in calls
- Contribute to Practice Growth Potential
- Facilitator for PCC resource allocation
- Resolution follow up
- Upcoming PCC functionality and updates
- Relationship Building





Regular Check-ins

- First point of contact to facilitate projects, tasks, and PCC resource allocation
- Task management for issues, projects, and milestones
 - Managing expectations and timelines
- Client investment in project process and outcomes
- Tracking the pulse of your practice
- Updates on PCC Release features and functionality





Practice Growth

- Accomplish long term projects together as a common goal
- Collaborate on efficiencies, improved workflows, best practices
- Assist with long term/strategic plans
- Provide guidance with change management

Examples:

- -Moving offices/ new owners/new providers
- -Contract negotiations
- -Reporting Requests
- -Training on new features
- -Enhancement requests Pediatric EHR Solutions



Facilitator for PCC Resource Allocation/Follow up:

• CAs are a wealth of knowledge, but can and often do enlist the help of other departments (experts) within the company (PedSol, Dev, Interop, etc) to accomplish more long term, complex projects and goals with our clients.

Pediatric Solutions:

- Certified Coder on staff-
 - Chart Audits
 - Bright Futures Protocols
 - ICD-10/SNOMED updates
 - Coding Weblabs
- Data Wrangling
 - Dashboards
 - Government Mandates and reporting
- Development Teams:
 - Software enhancements
 - Custom Projects
 - Software issues



Interop:

- Clinical
 - Immunization Registries
 - Patient Engagement Tools
 - PCC Patient Portal
- Development
 - PCC eRx
 - QBCDE
 - o DSM
 - Real Eligibility
 - Clearing house connections
 - 3rd Party Vendor connections
- Billing

Resolution Follow up:

Manages open issues and and follows up with appropriate resources

Relationship Building

More than just the software, more than the the implementation...

- CAs aim to understand your personalized practice needs and challenges
- Meeting your practice where you are
- Provide a personal touch to help facilitate your practice goals
 - Technical literacy
 - Training opportunities
 - Workflow assessment





Support Teams

It takes a village!

• NCI

- Not just famous for phenomenal implementations!
- Resource for Workflow assessments
- Protocol Best Practices

• RRT

- Triage for in-the-moment pain points & quickly addressable issues
- Critical liaisons for team-wide support for your practice

• TST

 Hardware, network, and security experts!



Beyond the Scope of a CA...

PCC's Client Advocates appreciate the trust and working relationships we've established with our clients, but we don't want to lead you astray

CAs are not:

- Medically trained professionals or certified in clinical consultation
- Authorized to e-prescribe or give medication advice
- Legal consultants

PCC Community may better serve you in collaborating with your peers for these types of issues





Takeaways:

To do:

- Ensure that you are on a regular call rotation
- Ensure that the frequency of calls fits your practice needs
- Ensure the appropriate people are available for calls
- Prepare ahead of time to gather necessary resources





Next Steps:

What new projects/services will you enlist from your PCC Client Advocate after hearing this presentation

1.

- 2.
- 3.



