

# Getting the most out of your Client Advocate

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# Goals

- 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



# 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
  - 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.

