

Optimizing PCC EHR: Workflow & Configuration Improvements You Can Use Today

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Goals 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, providing you with takeaways that you can begin using at your practice.



Managing Patients/Accounts



Add Patients/Accounts in PCC EHR

- It is 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



Add Patient

Search Results for Name: han solo

| C # | PCP | Patient Flags |
|-----|-----|---------------|
|-----|-----|---------------|

Find Create Patient Add Phone Note Open Chart

Add Patient

PCC EHR

FIND

Create Patient

Patient Demographics

First Name:

Nickname:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Sex:

Deceased: No Yes

Birth History

GA at Birth: weeks days

Multiple Birth: No Yes

Race, Ethnicity, and Preferred Language

Race:

Ethnicity:

Pref. Language: +

Patient Information

Patient Flags:

PCP:

SSN:

School:

Alt Name:

Chart #:

Relation to Bill Payor:

Account Demographics

No Home and Billing Account

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, VT 05404

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



Pediatric EHR Solutions



Reassign Patient Account(s)

Demographics Train Adam Hamann 5 yrs, 3 mos 3/05/17

No Preference

Account Demographics

Home and Billing Account Reassign Account

Elaine B. Hamann (Account # 1612)

First Name: Elaine B.

Last Name: Hamann

Address

153 East Cherry Street

address 2

Readsboro VT 05350

Phone

Primary: 802-555-0108

Secondary: 802-555-0190

Text Phone: 802-555-0174

Emg Phone: 802-555-0163

Email:

Account Information

Account Flags:

EMG Contact:

EMG Phone #:

Alt Last Name:

Mother SSN:

Father SSN:

Pharmacy #:

Recent Financial History

Last Service: 04/14/17

Last Bill Sent:

Last Pers. Pmt: 04/14/17

Last Ins. Pmt: 05/02/17

Hold Bill Until:

Budget Amt: \$

Add New Account

Reassign Account x

Reassign Account Train Adam Hamann 5 yrs, 3 mos 3/05/12 M

Account Finder Current Home Account: Elaine B. Hamann (Account # 1612)
Select an account to be assigned to the patient. Current Billing Account: Elaine B. Hamann (Account # 1612)

ham

Search Results for Name: ham

| Last | First | Last Service | Address | Account # | Account Flags |
|----------|-----------|--------------|--|-----------|---------------|
| Hamann | Elaine B. | 04/14/17 | 153 East Cherry Street, Readsboro, VT | 1612 | |
| Hamann | Timothy | 04/26/17 | 35 Prospect Street, Putney, VT | 1301 | |
| Hamilla | Randy | 04/26/17 | 578 Springbrook Drive, Orleans, VT | 787 | |
| Hamilton | Steven | 03/01/17 | 554 W Granada Ave, Richford, VT | 389 | |
| Hammond | Michael | | 92 University Manor East, Coventry, VT | 459 | |

Add New Account

Reassign Account x

Reassign Account Train Adam Hamann 5 yrs, 3 mos 3/05/12 M

Create Account

Account
First Name:
Last Name:

Address

Phone
Primary:
Secondary:
Text Phone:
Emg Phone:

Email:

Account Information
Account Flags:
EMG Contact:
EMG Phone #:
Alt Last Name:
Mother SSN:
Father SSN:
Pharmacy #:

Recent Financial History
Last Service:
Last Bill Sent:
Last Pers. Pmt:
Last Ins. Pmt:
Hold Bill Until:
Budget Amt:

Reassign Account Options

Reassign Account Train Adam

Selected account:
Denise Hamann (Account # 4014)

Assign as:

- Home Account
- Billing Account
- Home and Billing (Current Account: Elaine B. Hamann (Account # 1612))

Policies in PCC EHR

- Users can edit, add, and expire policies in PCC EHR.

| Policies | | | | | | | Edit Policy | Add Policy | Display: Active |
|----------|---------------|---------|-------------|-------|----------|-----|-------------|------------|-----------------|
| | Insurance | Copay | Certificate | Group | Start | End | Status | | |
| ▶ | 1. Aetna HDHP | \$15.00 | 34DFJH | | 10/13/15 | | Active | | |
| ▶ M | 2. Medicaid | \$0.00 | 123456789 | | 06/18/18 | | Active | | |

Policies in PCC EHR

Add Policy

Insurance: Payer ID:

Copay:

Certificate:

Group:

Start Date:

End Date:

Subscriber:

First Name:

Last Name:

Date of Birth:

Sex:

Address:

city: state: zip code:

Employer:

Pt. Relationship to Subscriber:

Auto-fill Last Modified: Aetna PPO 20% (PO Box 981106, El Paso, TX 79998-1106)

Aetna HDHP (PO Box 981106, El Paso, TX 79998-1106)

Aetna EPO \$10 Box 91522 (P.O. Box 91522, Arlington, TX 76015-0022)

Aetna EPO \$15 Box 91522 (P.O. Box 91522, Arlington, TX 76015-0022)

Aetna HDHP (PO Box 981106, El Paso, TX 79998-1106)

Aetna MC \$10 Box 1125 (PO Box 1125, Blue Bell, PA 19422)

Aetna MC \$15 Box 1125 (PO Box 1125, Blue Bell, PA 19422)

Aetna MC \$15,Full WC (PO Box 1125, Blue Bell, PA 19422)

Aetna MC \$25 (PO Box 1125, Blue Bell, PA 19422)

1106

at 1-800-345-1284 ext 111

- All active plans from Partner are searchable
- Can auto-fill last modified or sibling's policy info

Policies in PCC EHR

Add Policy

Insurance: Payer ID:

Copay: \$0.00

Certificate: 123456789

Group:

Start Date: 06/18/18

End Date:

Subscriber:

First Name:

Last Name:

Date of Birth: 05/14/08

Sex:

Address: 15 Quarry Lane

address 2

Winooski VT 05404

Employer:

Pt. Relationship to Subscriber:

- Medicaid plans are denoted with an “M”
- These plans auto-fill patient info in subscriber section

Personal Contacts

- Personal Contacts is EHR-only
- Additional contacts (including additional parents) for the patient can be added with contact information and notes.

Personal Contacts

Personal Contacts have not been entered.

select a personal contact

Add Patient Contact

Kevin Setlock (Custodian)

Primary Insurance

Secondary Insurance

Personal Contacts

Personal Contacts

Karen Setlock (Maternal Grandmother)

Phone: 240-304-3049

Note: Watches Carrie after school. Can bring in for appts and call with questions.

EDIT CONTACT

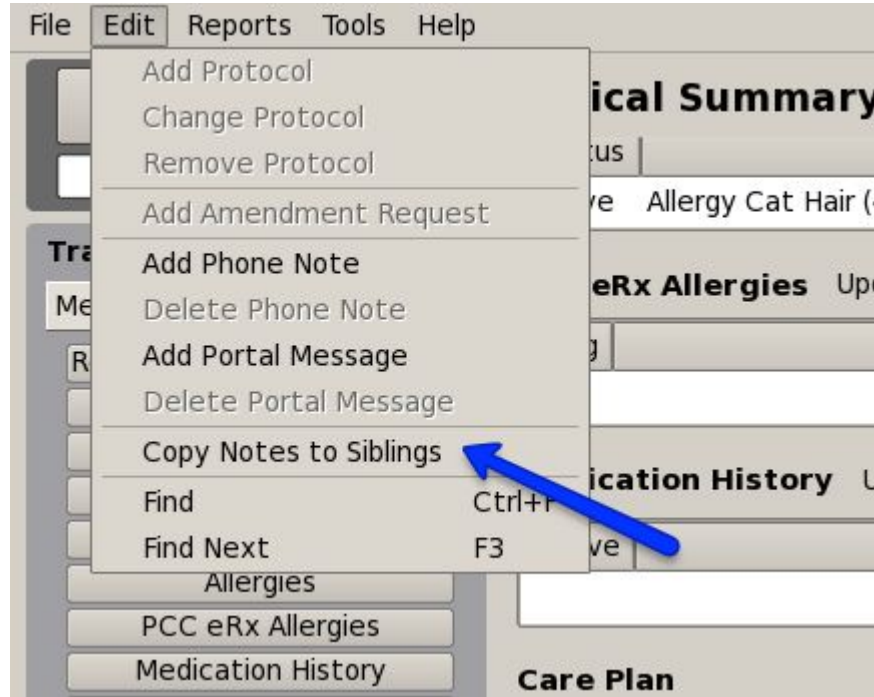
REMOVE

select a personal contact

Copy 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 Notes to Siblings



Copy Notes to Siblings

Family Medical History Modified 06/17/16

| Condition | Relationship | Note |
|-----------|------------------------|---|
| Eczema | Brother | |
| Anemia | Maternal A | Copy Family Medical History to Siblings |
| Epilepsy | Maternal Uncle, Mother | |



Copy Notes to Siblings

Copy Notes to Siblings

From: **Train Pebbles Flintstone 10 yrs, 1 mo 5/15/06 F**

Family Medical History

| Condition | Relationship | Note |
|-----------|-------------------------------------|------|
| Eczema | Brother | |
| Anemia | Maternal Aunt, Paternal Grandmother | |
| Epilepsy | Maternal Uncle, Mother | |

To: **Train Dino Flintstone 4 yrs, 2 mos 3/24/12 M**

Append Replace Custom Do Not Copy Notes for this Patient

Family Medical History

| Condition | Relationship | Note |
|-----------|-------------------------------------|------|
| Eczema | Brother | |
| Anemia | Maternal Aunt, Paternal Grandmother | |
| Epilepsy | Maternal Uncle, Mother | |

Back Save Cancel

Working with Documents



Documents in PCC EHR

- Possible to create a task from the Import Documents screen
- Tasks visible on Messaging queue and in patient's chart
- If a document has been set to require a provider's signature, the document can now be signed from anywhere the document is viewed

Create Task in Import Documents

tags

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: 1 (0 Completed)**

Task:
FYI

To:
Elizabeth Casey, M.D.

Note:

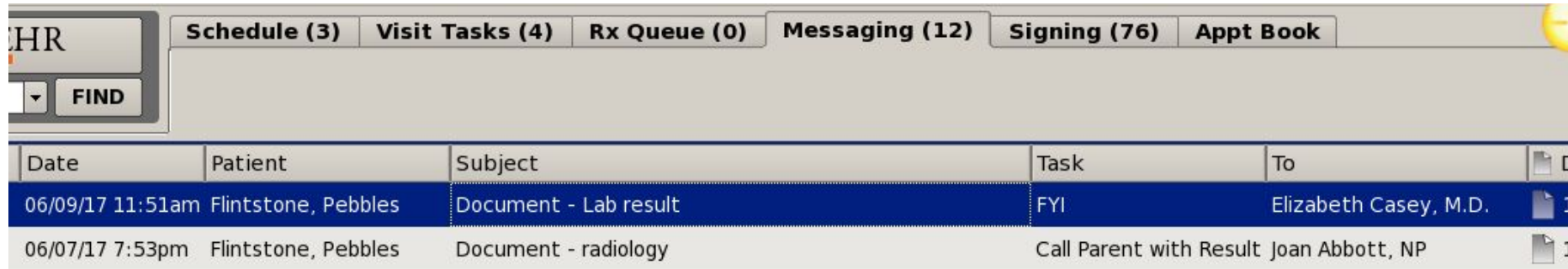
Task Completed

By: select a user

At: mm/dd/yy 12:00am

Add Task

Document Task in Messaging Queue



| Date | Patient | Subject | Task | To |
|------------------|---------------------|-----------------------|-------------------------|-----------------------|
| 06/09/17 11:51am | Flintstone, Pebbles | Document - Lab result | FYI | Elizabeth Casey, M.D. |
| 06/07/17 7:53pm | Flintstone, Pebbles | Document - radiology | Call Parent with Result | Joan Abbott, NP |

Viewing Document Task

Tags

▼ **Tasks: 2 (1 Completed)**

✓ Task:

FYI

To: Elizabeth Casey, M.D.

Note: Patient should be called with results.

Task Completed

By: Elizabeth Casey, M.D.

At: 06/09/17 11:53am

→ Task:

Call Patient with Result

To: Alice Normand

Note:

Task Completed

By: select a user

At: mm/dd/yy 12:00am

Add Task

Patient Demographics Included

Tags

Task:
Call Patient with Result

To:
Alice Normand

Note:

Task Completed

By: select a user

At: mm/dd/yy 12:00am

Add Task

Communication Preferences

Account Demographics

Home and Billing Account
Wilma & Fred Flintstone-Smith (Account # 1981)

Address
15 Quarry Lane
Colchester, VT 05446

Phone


| | |
|-------------|--------------|
| Primary: | 802-655-1234 |
| Secondary: | 802-555-0197 |
| Text Phone: | 802-555-0161 |
| Emg Phone: | 802-555-0168 |



Task Visible in Documents Screen

Documents Pebbles Flintstone 11 yrs, 1

- ▶ **Correspondence/Consults (1)**
- ▶ **Demographics (1)**
- ▶ **General (1)**
- ▶ **Hospital (1)**
- ▶ **Insurance/Billing (1)**
- ▼ **Lab (1)**



Title: Lab result
Category: Lab
Attached to: 05/11/17 - Sick - Bright Futures
Lab - Influenza A/B

▼ Tasks: 2 (1 Completed)

✓ Task: FYI
To: Elizabeth Casey, M.D.
Note: Patient should be called with results. [pcc 06/09/17 11:53am]
COMPLETED [elizabeth]

➔ Task: Call Patient with Result
To: Alice Normand

Last Modified: pcc 06/09/17 11:54am

Edit/Sign Document

Tags

Title: Lab result
Date: 05/11/17
Category: Lab
Pages: 1

Attached to: 05/11/17 - Sick - Bright Futures
Lab - Influenza A/B

▼ **Tasks: 2 (1 Completed)**

✓ Task: FYI
To: Elizabeth Casey, M.D.
Note: Patient should be called with results. [pcc 06/09/17 11:53am]
COMPLETED [elizabeth]

🕒 Task: Call Patient with Result
To: Alice Normand

▶ **Communication Preferences**
▶ **Account Demographics**

Last Modified: pcc 06/09/17 11:54am

Print Sign Edit Close

Keep Documents Open as You Chart

The screenshot displays the PCC EHR interface for a patient named Shaquana Padrone, 16 years, 9 months old, with a visit on 6/20/01. The main window shows the 'Lab' section with a 'Lead Screen' ordered to Alice Normand on 04/05/18. A dropdown menu is open, showing interpretation options: Normal, Abnormal, Below Low Normal, Low Urgent, Below Lower Panic Limits, Above High Normal, High Urgent, Above Upper Panic Limits, and Very Abnormal. A yellow callout box points to this menu with the text: 'Placing windows side-by-side allows you to easily copy data from an imported document into the patient's chart'. To the right, a 'Document Viewer' window shows a document titled '260 BEACH STREET WINDSOR, MA 02113' with patient information and a table of test results. The table includes columns for 'Date Sample Taken', 'Date Received by Lab', 'Date Sample Tested', 'Lab Identification #', 'Sample Type', and 'Blood Lead Concentration'. The concentration is listed as '<2 #g/dL'. Below the table is an 'Interpretation of Pediatric Test Results' section with text explaining concentration levels and their significance. The document viewer also shows 'Page 1 of 1', a timestamp 'lab.PNG 04/03/18 05:45pm', and buttons for 'Print', 'Sign', 'Edit', and 'Close'.

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

Communicating w/Patients & Families



Portal Users Component

- You can use the Patient Portal Users component in PCC EHR to quickly review portal information and help get all of your families using the patient portal.
- The component allows you to manage portal users and can confirm whether portal balances are enabled & privacy is enabled.



Portal Users Component

Patient Portal Users

Manage Portal User

Name: Wilma Flintstone Last Login: 07/11/18 11:30am
Email: wilma@bedrock.com Unread Messages: 0
Phone: 800-722-1082 Unviewed Documents: 0
Balances: Personal balances not displayed

Manage Portal User

Name: Fred Flintstone Last Login: never
Email: fred@bedrock.com Temporary Password: WSyeHRcv
Phone: 800-722-1082 Unread Messages: 0
Balances: Fred Flintstone (Account # 1980) Unviewed Documents: 0

Add Portal User

Review portal users who can view this patient, along with their recent activity

Portal Users Component

Patient Portal Users

This patient has no associated portal users.

[Add Portal User](#)

[Add Portal User](#)

[Manage Portal User](#)

Add Portal User

*Email Address:

*First Name:

*Last Name:

Phone Number:

*required

Sign In details will be automatically sent to the Portal User's email address.

Portal Users Component

Open the Patient Portal Manager to reset a password, adjust patient access, and more

[Manage Portal User](#)

Name: Fred Flintstone Last Login: *never*
Email: fred@bedrock.com Temporary Password: WSyEHRcv
Phone: 800-722-1082 Unread Messages: 0
Balances: Fred Flintstone (Account # 1980) Unviewed Documents: 0

Manage Portal User: Fred Flintstone [Back](#)

[Edit Portal User](#) [Delete Portal User](#)

Portal User Name: Fred Flintstone
Email Address: fred@bedrock.com
Phone Number: 800-722-1082
Temporary Password: WSyEHRcv [Print Password](#) [Reset Password](#)

Patients connected to this portal user [Add Siblings](#) [Add Patients](#)

| | Name | Hide at age 18 | DOB | Age | PCC # | Custodian |
|------------------------|-----------------|---------------------|----------|-------|-------|------------------|
| remove | Dino Flintstone | Yes | 04/24/14 | 4y 2m | 3335 | Wilma Flintstone |

Select billing account for personal balance display
The balance will not include charges for patients in *italics*. These patients have privacy enabled or are not connected to the portal user.

Fred Flintstone
Patients: Dino Flintstone, *Pebbles Flintstone*

Do not display balance



Portal Users Component

Patient Portal Users

Manage Portal User

Age-based privacy is enabled. Patient information cannot be viewed by this portal user.

| | | | |
|-----------|--------------------------------|---------------------|------------------|
| Name: | Terry Manning | Last Login: | 07/19/18 11:36am |
| Email: | tmanning@kobolds.net | Unread Messages: | 0 |
| Phone: | | Unviewed Documents: | 0 |
| Balances: | Kevin M Manning (Account # 56) | | |

Manage Portal User

| | | | |
|-----------|---------------------------------|---------------------|------------------|
| Name: | Wilma Flintstone | Last Login: | 07/11/18 11:30am |
| Email: | wilma@bedrock.com | Unread Messages: | 0 |
| Phone: | 800-722-1082 | Unviewed Documents: | 0 |
| Balances: | Personal balances not displayed | | |

Wilma Flintstone does not see personal balances in the portal for this patient. If she should, you can click "Manage Portal User" to adjust

Attach Documents to Portal Messages

Portal Message Abigail Addington 9 yrs, 11 mos 5/03/09 F

Portal Messages

Subject: Tips for Getting Started with Diabetes Management? TO:

Date: 05/02/19 1:39pm
From: Ansel Addington
Phone: 802-846-8177

Hi Dr.,
Abigail's grandmother (who watches Abb after school) wanted to learn what she should know about her diagnosis.
Anything useful to share?
-Ansel

Reply

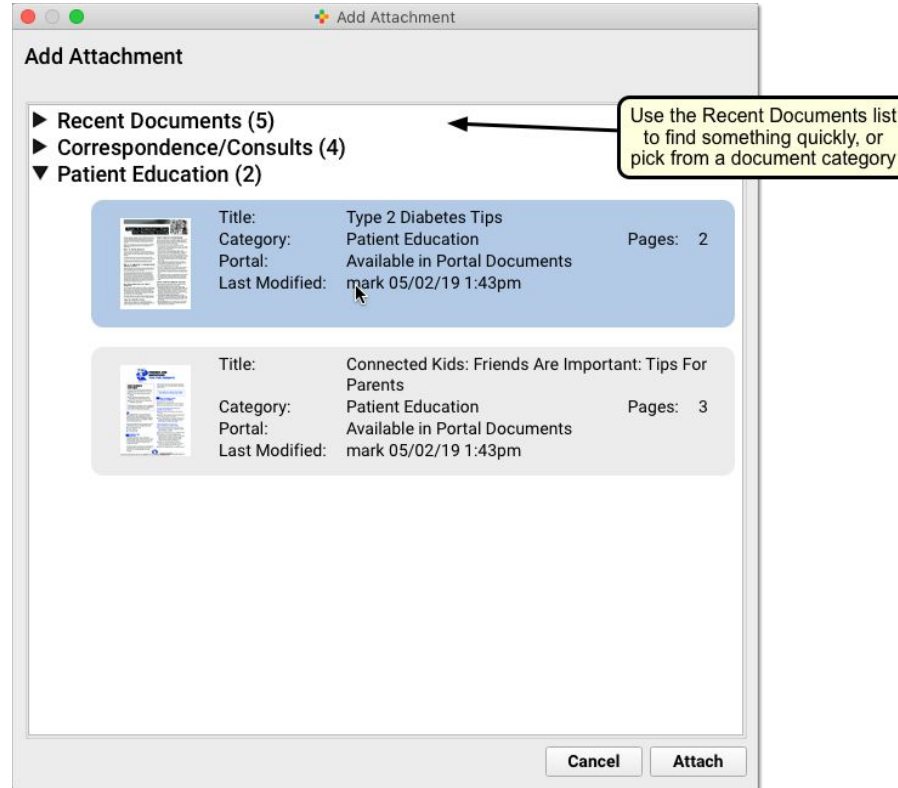
Hello,
Our care coordinator can talk with Abigail's grandmother, either over the phone or you can schedule time to talk in person.

I've attached the handout that we provided at our last appointment.

Call the office (800-722-1082) or send a message for our scheduler, and we can set up an appointment.

-Nurse Mark

Attach Documents to Portal Messages



Attach Documents to Portal Messages

Portal Message Abigail Addington 9 yrs, 11 mos 5/03/09 F

Portal Messages

Subject: Tips for Getting Started with Diabetes Management? TO:

Date: 05/02/19 1:39pm
From: Ansel Addington
Phone: 802-846-8177

Hi Dr.,
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-Ansel

Reply


Hello,
Our care coordinator can talk with Abigail's grandmother, either over the phone or you can schedule time to talk in person.

I've attached the handout that we provided at our last appointment.

Call the office (800-722-1082) or send a message for our scheduler, and we can set up an appointment.

-Nurse Mark

Attachments

| | | |
|---|--|----------|
|  | Title: Type 2 Diabetes Tips Category: Patient Education Portal: Available in Portal Documents Last Modified: mark 05/02/19 1:43pm | Pages: 2 |
|---|--|----------|

Attach Documents to Portal Messages

Back My Kid's Chart Reply

Abigail Addington
Sex: Female
Birthdate: 05/03/09
Last Physical: 12/07/18

Subject: Tips for Getting Started with Diabetes Management?

Thu 05/02/19 2:00pm
Mark Williams, M.D.



Hello,
Our care coordinator can talk with Abigail's grandmother, either over the phone or you can schedule time to talk in person.

I've attached the handout that we provided at our last appointment.

Call the office (800-722-1082) or send a message for our scheduler, and we can set up an appointment.

-Nurse Mark

Attachments

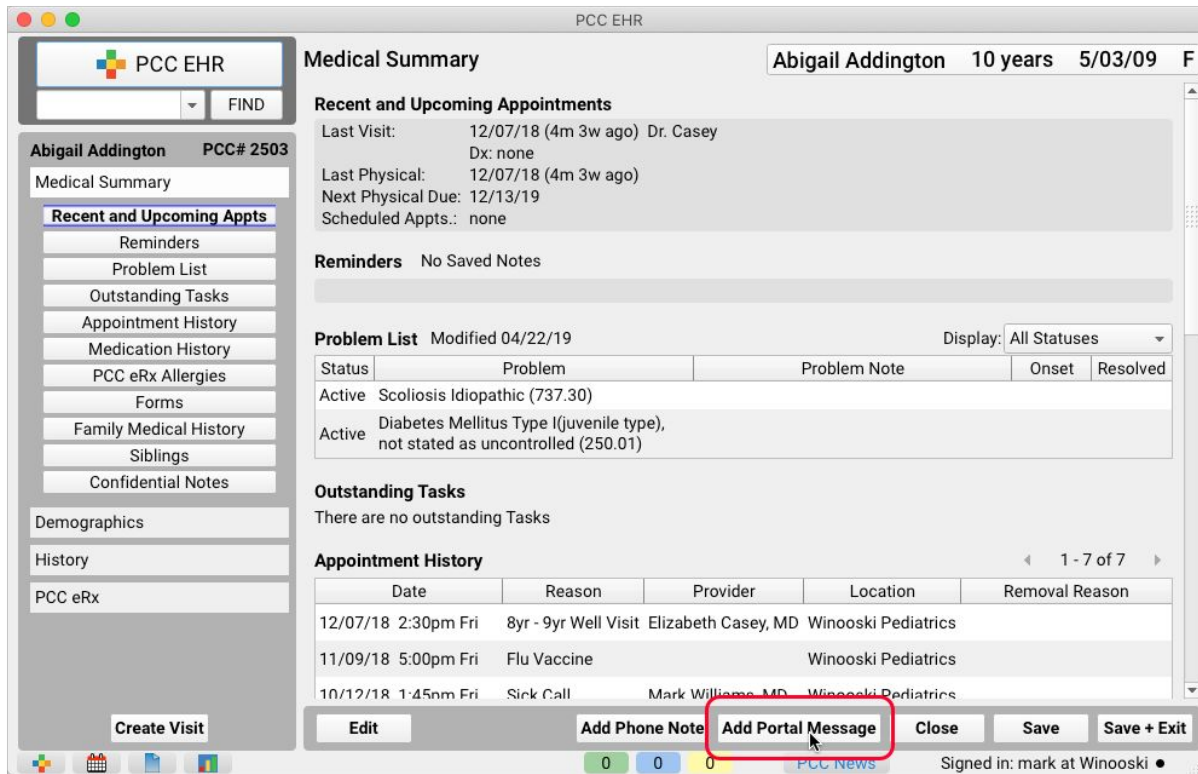
 05/02/19 - Type 2 Diabetes Tips 

Thu 05/02/19 1:39pm
Ansel Addington

Hi Dr.,
Abigail's grandmother (who watches Abb after school) wanted to learn what she should know about her diagnosis. Anything useful to share?

-Ansel

Add Portal Message Button



The screenshot shows the PCC EHR interface for a patient named Abigail Addington, 10 years old, with a medical summary. The interface includes a sidebar with navigation options, a main content area with sections for appointments, reminders, problem list, outstanding tasks, and appointment history, and a bottom toolbar with buttons for 'Add Portal Message', 'Close', 'Save', and 'Save + Exit'. The 'Add Portal Message' button is highlighted with a red box.

PCC EHR
Abigail Addington PCC# 2503
Medical Summary

Recent and Upcoming Appts

- Reminders
- Problem List
- Outstanding Tasks
- Appointment History
- Medication History
- PCC eRx Allergies
- Forms
- Family Medical History
- Siblings
- Confidential Notes

Medical Summary Abigail Addington 10 years 5/03/09 F

Recent and Upcoming Appointments

Last Visit: 12/07/18 (4m 3w ago) Dr. Casey
Dx: none
Last Physical: 12/07/18 (4m 3w ago)
Next Physical Due: 12/13/19
Scheduled Appts.: none

Reminders No Saved Notes

Problem List Modified 04/22/19 Display: All Statuses

| Status | Problem | Problem Note | Onset | Resolved |
|--------|--|--------------|-------|----------|
| Active | Scoliosis Idiopathic (737.30) | | | |
| Active | Diabetes Mellitus Type I(juvenile type), not stated as uncontrolled (250.01) | | | |

Outstanding Tasks There are no outstanding Tasks

Appointment History 1 - 7 of 7

| Date | Reason | Provider | Location | Removal Reason |
|---------------------|----------------------|---------------------|---------------------|----------------|
| 12/07/18 2:30pm Fri | 8yr - 9yr Well Visit | Elizabeth Casey, MD | Winooski Pediatrics | |
| 11/09/18 5:00pm Fri | Flu Vaccine | | Winooski Pediatrics | |
| 10/12/18 1:45pm Fri | Sick Call | Mark Williams, MD | Winooski Pediatrics | |

Bottom Toolbar: Edit, Add Phone Note, **Add Portal Message** (highlighted), Close, Save, Save + Exit

Signed in: mark at Winooski

Documents From Parents/Patients in Patient Portal

- Parents/Patients can 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

[Back](#) My Kid's Chart

This message service is intended for non-critical questions only! If you require assistance immediately, please call the office. If you have a medical emergency, call 911.

Patient


Pebbles Flintstone

Subject

Rash

Message

I am attaching a picture of a rash Pebble's has on her arm after playing outside this afternoon. I am wondering if I need to bring her in, or how to treat it.

 IMG_2637.jpg

[Send](#)

[Attach a Photo or PDF](#)

Document Visible in Messaging Queue

| Date | Patient | Subject | Task | To | |
|------------------|---------------------|-----------------------|----------------|----|---|
| 06/13/17 10:56am | Flintstone, Pebbles | Portal Message - Rash | Portal Message | | 1 |

Edit Portal Message Document

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:

Working with the Patient Chart



Outstanding Tasks

- The Outstanding Tasks component in the Medical Summary shows all outstanding tasks for the patient.
- Icons indicate if the task is attached to an order, phone note or document.
- You can add this component to other sections of the chart or protocols.



Outstanding Tasks Component

Medical Summary Rudy Blanchard 1 yr, 6 mos 12/19/16 F




Recent and Upcoming Appointments

Last Visit: 07/10/18 (1d ago) Dr. Casey
Dx: none
Last Physical: none
Next Physical Due: none
Scheduled Appts.: none


Reminders No Saved Notes

Outstanding Tasks

Icons indicate whether tasks are associated with orders, documents or messages. Click on an icon to go directly to the task

| Tasks | Date | Provider | Order/Subject | Task | To |
|---|----------|--------------------------|--------------------------------|-------------------------------|-------------|
|  | 07/10/18 | Elizabeth Mary Casey, MD | Immunization - IPV | Immunization Needed | |
|  | 07/10/18 | | Document - Records Request | Additional Information Needed | Anita Sharp |
|  | 07/05/18 | Elizabeth Mary Casey, MD | Amendment Request from a Visit | Amendment Request | |

Problem List Modified 07/05/18 Display: All Statuses

| Status | Problem | Problem Note | Onset | Resolved |
|--------|--|--------------|-------|----------|
| Active |  Attention deficit hyperactivity disorder | | | |

Edit **Add Phone Note** **Close** **Save** **Save + Exit**

Outstanding Tasks Component

File Edit Reports Tools Help

PCC EHR

Orange chart sections and components help you quickly find outstanding tasks in the patient's chart

- Recent and Upcoming Apps
- Reminders
- Outstanding Tasks
- Problem List
- Medication History
- PCC eRx Allergies
- Family Medical History
- Care Plan
- Siblings
- Forms
- Demographics
- History
- PCC eRx
- Visit: 07/10/18
- 18 Mo Well - (client v. I) Brig...

PCC EHR

Rudy Blanchard PCC# 3313

Visit History

07/10/18 - 18 Mo Well - (client v. I) Bright Futures

Appointment Details

Appt Time: 07/10/18 9:00am
Arrival Time: 07/09/18 2:29pm
Visit Reason: 18mo Well Visit
Patient Age: 1 yr, 6 mos
Location: Winooski Pediatrics
Provider: Elizabeth Mary Casey, MD

Click on an icon to go directly to the task

Hover your mouse over each icon to get details about the task(s) associated with a visit

Visit History Index

| Tasks | Date | Age | Protocols | Details |
|-------|----------|-------|---|----------|
| | 07/10/18 | 1y 6m | 18 Mo Well - (client v. I) Bright Futures | Dx: none |

| Status | Date | Document Title | Task | To |
|-------------|----------|----------------------------|-------------------------------|-------------|
| Outstanding | 07/10/18 | Document - Records Request | Additional Information Needed | Anita Sharp |


Due Dates for Tasks

- You can add a due date to a task and then use PCC EHR's tools to track down work that needs to be done today or later.
- When you create a task, the default due date will be today. You can change it at any time, and edit orders to update their due dates.

Due Dates for Tasks

Followup

EDITING

Call to Schedule Followup  Ordered


Result:

Signature Required

Include on Patient Reports

▼ **Tasks: 1 (0 Completed)**

Task To

 Due

Note

Task Completed At By

ADD TASK **DISCARD CHANGES** **SAVE ORDER**

I want my staff to call the family on 03/01/2019 to schedule their followup

Due Dates for Tasks

The screenshot shows the PCC EHR interface with the 'Visit Tasks (1)' queue selected. The queue contains one task: a Cardiology Referral Order for patient Barr, Kristen, due on 01/17/19. The interface includes a search bar, a task list table, and a filter panel at the bottom. Two callout boxes provide additional information: one points to the task row stating that the queue defaults to showing due or past due tasks, and another points to the filter panel stating that the current view is filtered by 'Referral Order' tasks due on or before 01/17/19.

| Completed | Date | Due | Patient | Visit Status (Rm.) | Provider | Order | Task | To | Docs | In Use |
|-----------|------------------|----------|---------------|--------------------|----------|------------|----------------|------------|------|--------|
| | 01/02/19 08:46am | 01/17/19 | Barr, Kristen | Gone | Crusher | Cardiology | Referral Order | Unassigned | | |

Task: Referral Order | **Location:** All Locations | **Due:** 01/17/19 | **Display:** Not Completed

Assigned User: All Users | **Provider:** All Providers

Page Up **Page Down** Page 1 / 1 **Open Chart** **Edit Order**

By default, the Visit Tasks queue will only list tasks that are due or past due


You can filter the queue. I'm viewing all Referral Orders that are due on or before 01/17/19



Due Dates for Tasks

Medical Summary Taleda M Simmons 3 yrs, 1 mo 11/23/15 F

Outstanding Tasks

| Tasks | Date | Due | Provider | Order/Subject | Task | To |
|--|----------|----------------------|--------------------------|---|---------------------------------------|----|
|  | 01/17/19 | 03/01/19 01/30/19 | James Davidson, Jr. M.D. | Followup - Call to Schedule Followup Referral - Speech Therapy | Appointment Needed Confirm Outcome | |

The Outstanding Tasks component displays the due dates for tasks in incomplete orders

Hiding Orders from Patient Reports

- When configuring orders in the EHR it is possible to hide items from patient reports (patient vis. summary, health info. summary & patient portal).
 - Example: sensitive labs
- When the order is placed, there's an 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

Screening Orders - Add Order

Order Name:

- "Include on Patient Reports" will be selected when this order is issued
- Allow this order to be Refused
- Allow this order to be Contraindicated



Lab Configuration

Lab Orders Common Tests Lab Facilities

Edit Lab Order

Lab Order Name:

Default Lab Facility:

- Enable recording of Specimen Collection user, date and time
- "Include on Patient Reports" will be selected when this order is issued
- Allow this order to be Refused
- Allow this order to be Contraindicated



Uncheck this box

Hiding Diagnoses & Family Medical History from Patient Reports

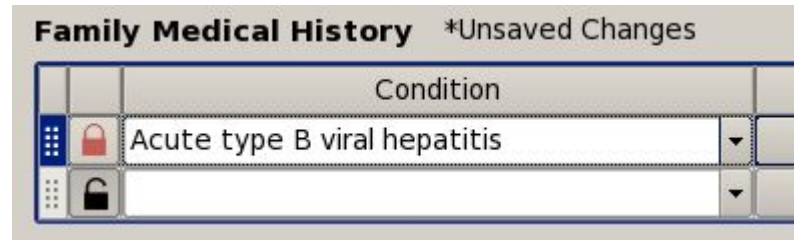
- Diagnoses (both from the problem list and visit note) can be hidden from patient reports
- Diagnoses and family medical history SNOMED codes can be hidden from patient reports by default in Diagnosis Configuration

Hide Problem List Diagnoses

Problem List *Unsaved Changes Display: All Statuses ▾

| | Status | Problem | Problem Note | Onset | Resolved |
|---|----------|---------------------------|--------------|-------|----------|
| ⋮ | Active ▾ | Asthma ▾ | | | |
| ⋮ | Active ▾ | Eczema ▾ | | | |
| ⋮ | Active ▾ | Pregnancy test positive ▾ | | | |
| ⋮ | Active ▾ | | | | |

Hide Family Medical History Diagnoses



Hide Visit Diagnoses



Disorder of respiratory system

Refine the diagnosis of Disorder of respiratory system

ICD-10: J98.9 Respiratory disorder, unspecified

Include on Patient Reports

notes

Add to Problem List

Onset:

Problem Note:



Pregnancy test positive

Refine the diagnosis of Pregnancy test positive

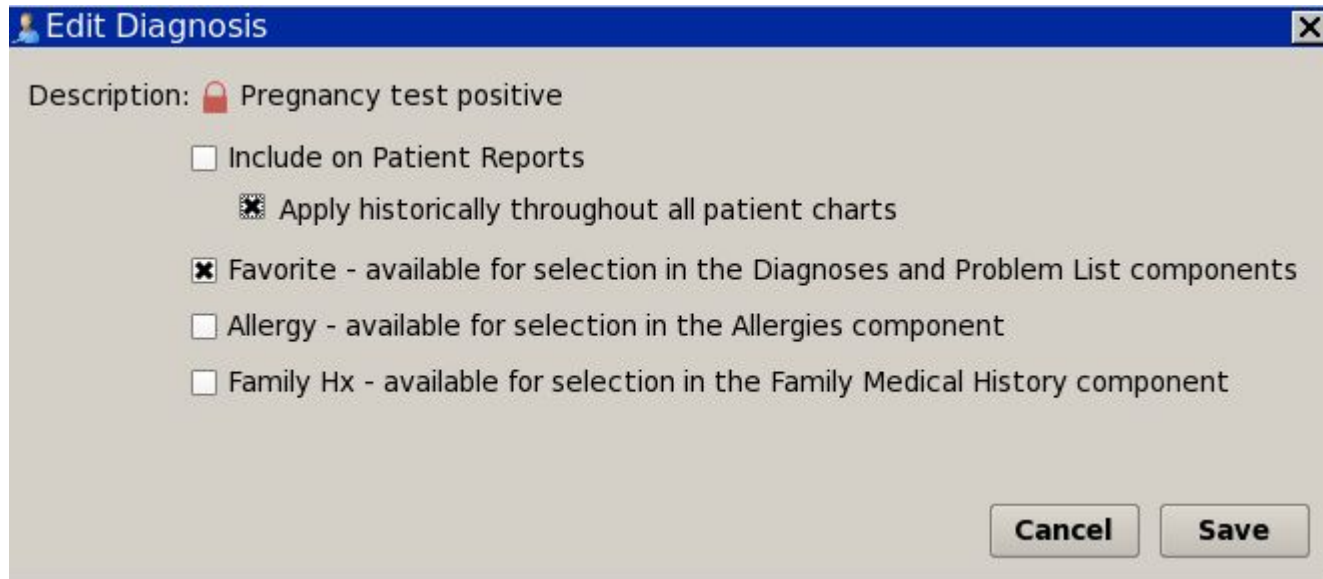
ICD-10: Z32.01 Encounter for pregnancy test, result positive

Include on Patient Reports


notes

ACTIVE ON PROBLEM LIST: Pregnancy test positive

Diagnosis Configuration



Edit Diagnosis

Description:  Pregnancy test positive

- Include on Patient Reports
 - Apply historically throughout all patient charts
- Favorite - available for selection in the Diagnoses and Problem List components
- Allergy - available for selection in the Allergies component
- Family Hx - available for selection in the Family Medical History component

Cancel **Save**

Access Problem List Diagnosis in Visit

- The diagnosis component in the visit will access the problems on the problem list for selection when diagnosing the patient in the visit

The screenshot shows a software interface for a medical visit. At the top, there is a checkbox for "Well child visit" and a dropdown menu to "Refine the diagnosis of Well child visit". Below this are two ICD-10 code fields: "Z00.129 Encounter for routine child health examination without abnormal findings" and "Z68.52 Body mass index (BMI) pediatric, 5th percentile to less than 85th percentile for age". There is also a "notes" field and a section for "Add to Problem List" with "Onset" and "Problem Note" fields.

The main part of the interface is a dropdown menu titled "select diagnosis or active problem". The list of options includes:

- Bronchiolitis (highlighted with a blue box and a blue arrow pointing to it from a text box that says "From the patient's problem list")
- Asthma
- Eczema
- 18 month examination normal
- Abdominal bruit
- Abdominal colic
- Abdominal colic in child less than or equal to 12 months
- Abdominal discomfort
- Abdominal muscle pain

At the bottom of the interface, there are buttons for "Previous", "Next", "Bill", "Sign", "Close", "Save", and "Save + Exit".

Fenton Preterm Growth Charts

- PCC EHR includes the Fenton preterm growth charts
- Enter the gestational age at birth in the patient's demographics
- If gestational age < 37 wks, Fenton charts will display until the patient reaches 50 weeks of gestational age.

Demographics Train A

Patient Demographics

Train Alison A. Sabino

First Name: Train Alison

Nickname:

Middle Name: A.

Last Name: Sabino


Suffix:

Date of Birth: 03/24/16

Sex: Female

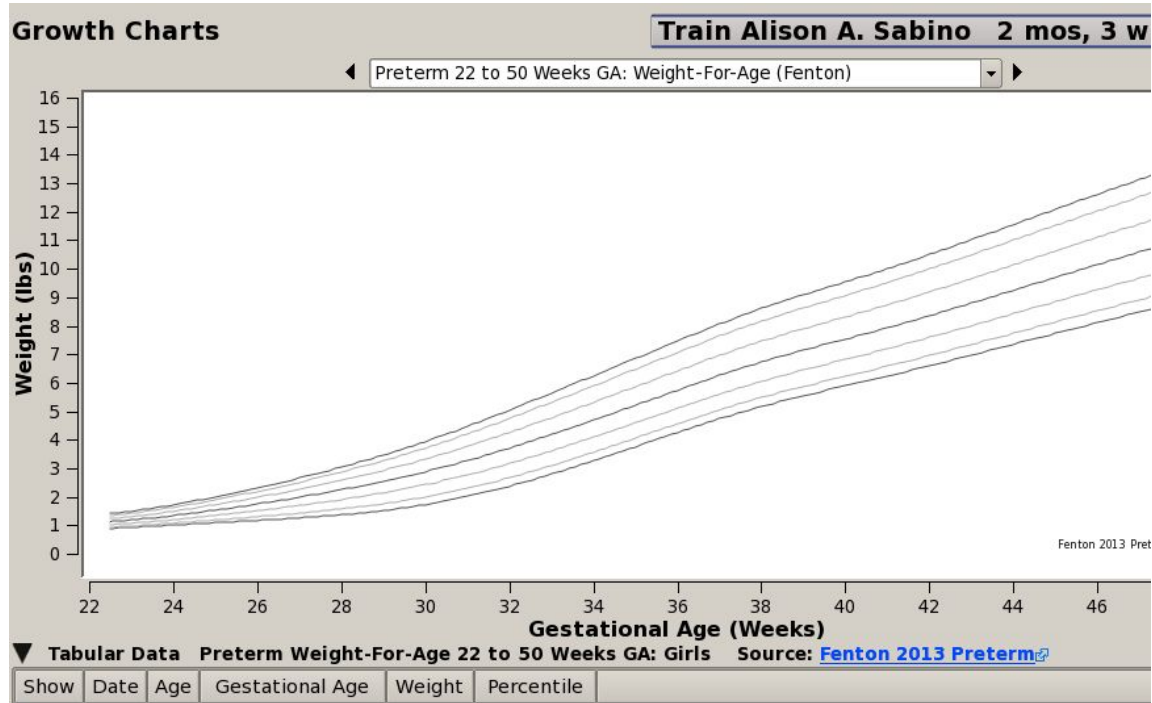
Deceased: No Yes

Birth History

GA at Birth: 26 weeks 3 days 

Patient
Patient
PCP:
SSN:
School:
Alt Name:
Chart #

Fenton Preterm Growth Charts



Down Syndrome Growth Chart

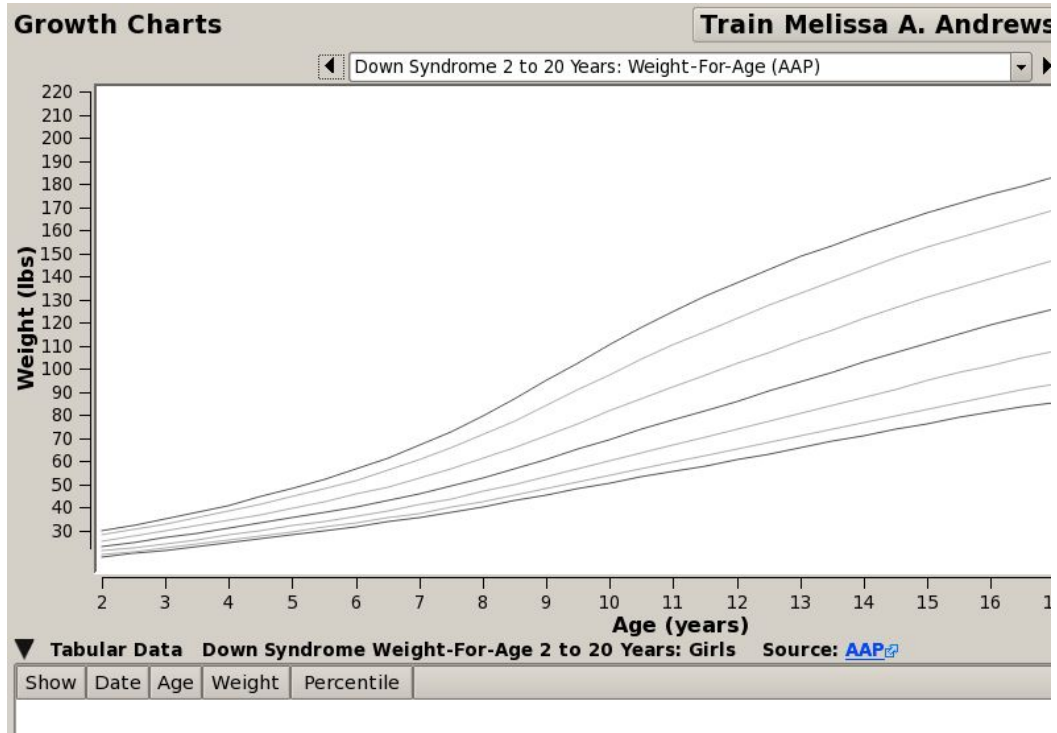
- If a diagnosis of Down Syndrome is added to the patient's problem list, the Down Syndrome growth chart will appear automatically.

Medical Summary Train Melissa

Problem List Modified 06/17/16

| Status | Problem | Problem |
|--------|---------------------------------------|---------|
| Active | Partial trisomy 21 in Down's syndrome | |
| Active | | |

Down Syndrome Growth Chart



Using PocketPCC for Charting



Enter Vitals in Pocket PCC

Vitals

Weight +

88 lbs 1 oz (39.940 kg)
81st percentile (CDC)

Height +

57 in (144.78 cm)
82nd percentile (CDC)

Temperature +

98 °F

Oral

BMI (Estimated)

19.1 kg/m²
Height: 57 in - 07/11/18
78th percentile (CDC)
Healthy Weight

More

Visit: 07/05/18

Sick - Bright Futures

- Appointment Details
- Intake**
- History
- Review of Systems
- Social/Family History
- Physical Exam
- Diagnoses
- Lab
- Medical Test
- Radiology
- Medical Procedures
- Immunizations
- Plan
- Forms
- Prescriptions
- Visit Documents
- Amendment Requests

Vitals

Weight lbs oz
88 lbs 1 oz 81st percentile_(CDC) (39.944 kg)
Entered by Dr. Casey

Height
57 in 83rd percentile_(CDC) (144.78 cm)

Temperature °F
Unspecified Method

98 °F
Oral

98.4 °F
Tympanic

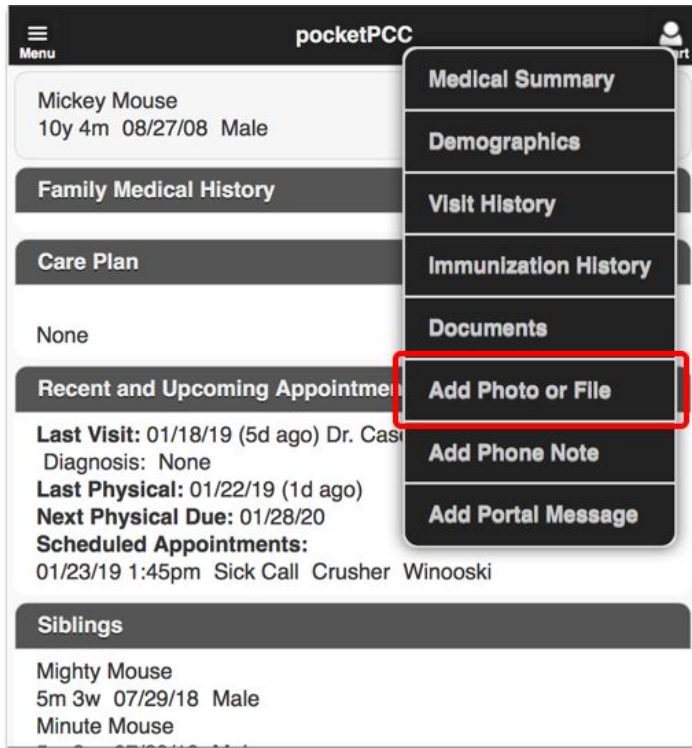
BMI 19.1 kg/m² 78th percentile_(CDC)
Healthy Weight

More

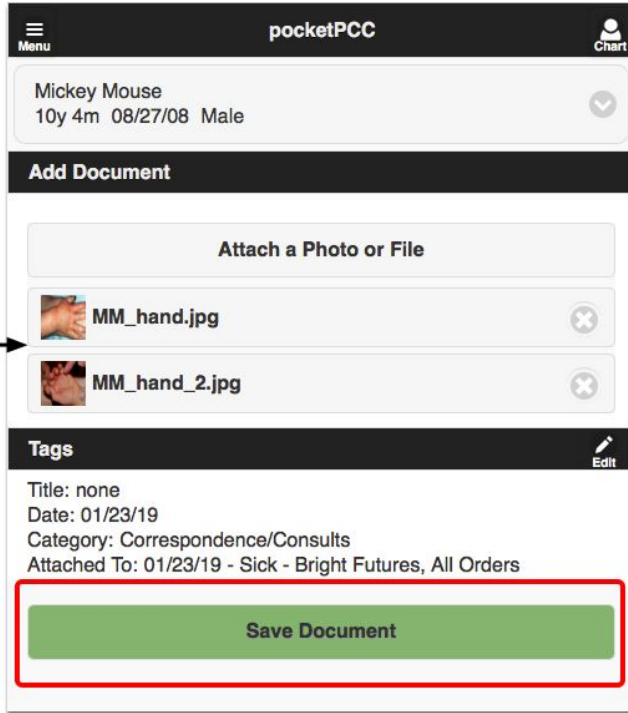
Hover over vitals to see who entered them



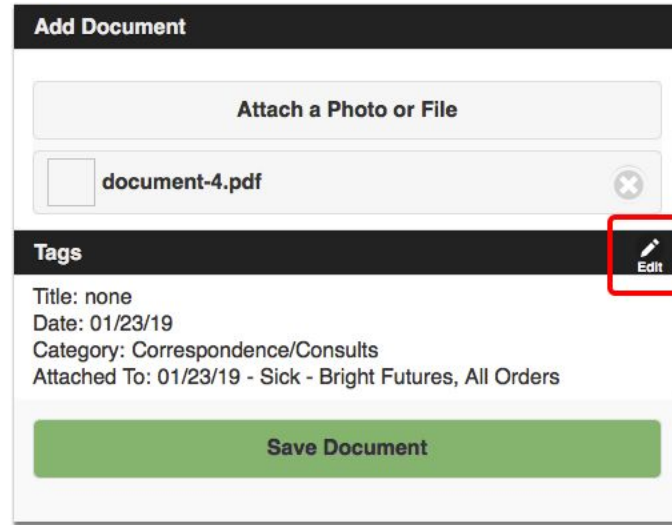
Attach Photos to Charts via Pocket PCC



Attach Photos to Charts via Pocket PCC



You can take or upload multiple files at one time, up to 30mb



Edit tags before saving

Attach Photos to Charts via Pocket PCC

PCC EHR Sick - Bright Futures Mickey Mouse 10 yrs, 4 mos 8/27/08 M

Order: select a referral

Followup
Order: select a followup

Forms
Generate School Nurse Meds Admin
Generate School/PE Excuse
select a form

Visit Documents

| Thumbnail | Title | Category | Attached to | Last Modified | Date | Pages | Action |
|-----------|-------|-------------------------|--|---------------------------|----------|-------|-------------------------------|
| | none | Correspondence/Consults | 01/23/19 - Sick - Bright Futures, All Orders | elizabeth 01/23/19 4:06pm | 01/23/19 | 1 | View Document |
| | none | Correspondence/Consults | 01/23/19 - Sick - Bright Futures, All Orders | elizabeth 01/23/19 3:24pm | 01/23/19 | 2 | View Document |
| | none | pocketPCC Files | 01/23/19 - Sick - Bright Futures, All Orders | elizabeth 01/23/19 9:15pm | 01/23/19 | 3 | View Document |

You can see the photos/files in the chart note immediately. Click "View Document" to edit tags

Previous Next Billed Sign Close Save Save + Exit



Sending Records Electronically



Attach Document to Direct Secure Msg

Summary of Care Record

Summary of Care Record

Continuity of Care Document

| | |
|-----------------------------------|--|
| Patient | Megan Marciano |
| Date of birth | May 28, 2010 |
| Sex | Female |
| Race | |
| Ethnicity | |
| Contact info | Home: 766 Irene Drive Windsor, VT 05089, US Tel: 802-555-0199 |
| Patient IDs | 3288 2.16.840.1.113883.3.2402.400.100.3 |
| Document Id | 79049752-08c6-44c4-a99e-bcaa42614292 |
| Document Created: | May 3, 2019, 13:07:45 -0400 |
| Performer (primary care provider) | |
| Author | PCC EHR |

Select a referral or outbound transition of care:

select referral or outbound transition of care

Print
 Save as a PDF file
 Save as a C-CDA file
 Send via Direct Secure Messaging:

Cancel Print

| | |
|-----------------------------------|--------------------------------------|
| Document Id | 79049752-08c6-44c4-a99e-bcaa42614292 |
| Document Created: | May 3, 2019, 13:07:45 -0400 |
| Performer (primary care provider) | |
| Author | PCC EHR |

Select a referral or outbound transition of care:

Related to an outbound transition of care

Print
 Save as a PDF file
 Save as a C-CDA file
 Send via Direct Secure Messaging:

Cancel Send to...

After selecting "Send via Direct Secure Messaging:", the "Print" button changes to a "Send to..." button

Attach Document to Direct Secure Msg

Direct Secure Message

To: hippocrates-0120@qa0226q2.sdirect.com

From: Mark Williams, M.D. (mark@ehrdoc.qa.pcc-direct.com)

Subject: Transition of care

Message:
C-CDA and related documentation for Megan Marcano.

Attachments (maximum 50MB):
Continuity of Care Document (23 KB)

Fill out the To and Subject fields, optionally add a message, and use the buttons at the bottom of the dialogue to add files or documents

Attach File Attach Document Cancel Send

Add Attachment

Recent Documents (1)

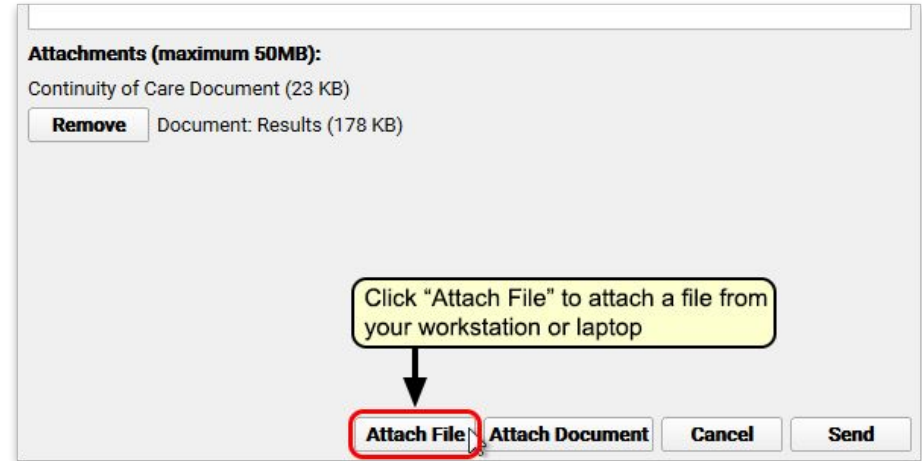
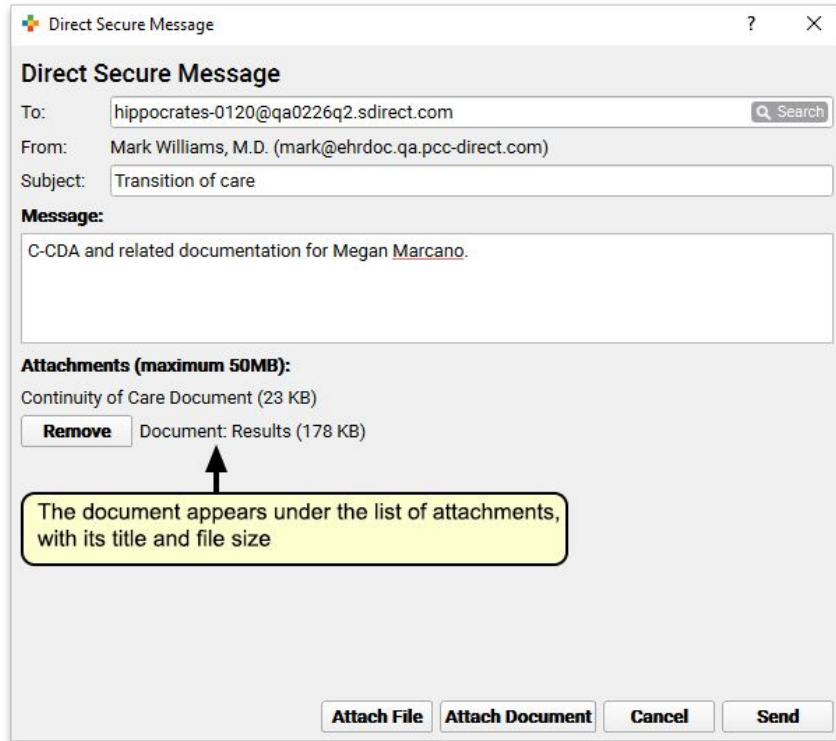
| | | |
|--|-------------------------------------|----------|
| | Title: Results | Pages: 1 |
| | Category: Correspondence/Consults | |
| | Last Modified: mark 05/03/19 1:01pm | |

Correspondence/Consults (1)

Select a document from the Recent Documents list or a document category, and click "Attach"

Cancel Attach

Attach Document to Direct Secure Msg



Immunizations & Inventory



Track Imms Admin with Barcodes

Medical Test

Radiology

Medical Procedures

Immunizations

Plan

Forms

Immunization Orders

Select Vaccine Lots

Edit Refuse → DTaP To: alice

Edit Refuse → Hepatitis A To: alice

Edit Refuse → Prevnar 13 To: alice

Order Refuse select an immunization

Once you've placed your immunization orders, click "Select Vaccine Lots"

Track Imms Admin with Barcodes

Select Vaccine Lots

Vaccines For Children
Insurance and Race as of 01/24/19
Primary: Health Assurance Healthstyles \$10 (Copay \$10)
Eligibility Status: select an eligibility status

Ready to scan...

DTaP
Lot #:

Hepatitis A
Lot #:

Pevnar 13
Lot #:

Select eligibility status, and then scan your vials

Cancel Save

Select Vaccine Lots

Vaccines For Children
Insurance and Race as of 01/24/19
Primary: Health Assurance Healthstyles \$10 (Copay \$10)
Eligibility Status: Medicare (V24)

Ready to scan...

DTaP
Lot #: HY2G7 (Public VFC) Scanned by mark 01/24/19 10:54am

Hepatitis A
Lot #: 5953X (Private funds) Scanned by mark 01/24/19 10:55am

Pevnar 13
Lot #: T94424 (Federal funds) Scanned by mark 01/24/19 10:55am

T94424 (Federal funds)
T94424 (Private funds)
Open Vaccine Lot Manager

The scanner will automatically select the lot. You can also use the drop-down arrows, before or after scanning, to manually select a lot or open the Lot Manager

Cancel Save

View Imms Admin in the Lot Manager

Immunization Configuration

Immunization Configuration

Lot Manager Immunization History Screen Diseases

When you select a lot . . .

Lot Manager

| Immunization (CVX) | Manufacturer (MVX) | Lot Number | Expiration | Funding Source |
|--------------------|------------------------------|---------------|-----------------|----------------------|
| DTaP (20) | Aventis Behring L.L.C. (AVB) | C3141AA | | Private funds |
| DTaP (20) | Crucell (CRU) | 444444 | 01/01/19 | Private funds |
| HIB (49) | Akorn, Inc. (AKR) | UB56789 | | State funds |
| HIB (49) | Akorn, Inc. (AKR) | UB56792 | | State funds |
| HIB Unspec (17) | Aventis Behring L.L.C. (AVB) | Uf673AA | | State funds |
| HPV (62) | Abbott Laboratories (AB) | lot number | 09/30/19 | Federal funds |
| Hepatitis A (83) | GlaxoSmithKline (SKB) | 3458dge | | Other funds |
| Hepatitis B (08) | Unknown Manufacturer (UNK) | 268646487665 | | Unspecified funds |

View Imms Admin in the Lot Manager

Immunization Configuration

Lot Manager | Immunization History Screen | Diseases

Lot Manager - Edit Lot

Lot
Immunization: DTaP CVX: 20
Manufacturer: Crucell MVX: CRU
Lot Number: 444444
Expiration Date: 01/01/19
Funding Source: Private funds
Location: Winooski Pediatrics

Status
 Available (Available lots can be selected for immunization orders)
 Reserved
 Depleted

Inventory Management
Adjustment Date: 10/16/18 12:09pm
Adjustment Reason: select an adjustment reason
Note:
Current Quantity: 95 Doses
New Quantity: 95 Doses

► Diluent

... you see a log of all transactions associated with that lot

Vaccine Inventory Transaction Log [Open in Report Library](#)

| Adjustment Date/Time | Adjustment Reason | Adjustment Note | Adjustment User | Patient Name | Patient PCC # | Patient DOB | Patient Sex | Adjustment Increase Amount | Adjustment Decrease Amount | Balance of Doses |
|----------------------|------------------------------|-----------------|---------------------|---------------------------|---------------|-------------|-------------|----------------------------|----------------------------|------------------|
| 09/10/2018 2:48pm | Increase - Shipment Received | | Mark Williams, M.D. | | | | | 100 | | 100 |
| 09/20/2018 1:00pm | Decrease - Wasted | | Douglas Beagley | | | | | | 2 | 98 |
| 10/06/2018 11:58am | Decrease - Administered | | Douglas Beagley | Deschutes, Brooklyn Dolly | 3430 | 04/21/2014 | F | | 1 | 97 |
| 10/08/2018 11:57am | Decrease - Administered | | Douglas Beagley | Marrero, Jordan | 3074 | 10/10/2015 | M | | 1 | 96 |
| 10/11/2018 11:57am | Decrease - Administered | | Douglas Beagley | Flintstone, Pebbles | 3336 | 09/10/2008 | F | | 1 | 95 |

Cancel Save

Vaccine-Preventable Diseases

- The Immunization History & immunization order component will list vaccine-preventable diseases
- The disease is added to the immunization section if diagnosed in a visit or added to 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: 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 | <i>date unknown</i> |

EHR Navigation



Open Multiple Windows in PCC EHR

The screenshot displays the PCC EHR application window. At the top is a menu bar with options: File, Edit, Reports, Tools, Configuration, Window, and Help. Below the menu bar is a search bar with the PCC EHR logo and a 'FIND' button. To the right of the search bar are three tabs: 'Schedule (17)', 'Visit Tasks (99+)', and 'E-lab Results'. The main area contains a table with the following columns: Visit Status, Room, Tasks, Arrival, Time, Last, and First. The table lists several scheduled visits, with the entry for '11:30am Marcano Megan' highlighted in blue. Below the table is a 'Billing Status' dropdown menu set to 'All Billing Statuses'. At the bottom of the window is a taskbar with four icons: a PCC EHR logo, a calendar, a document, and a window icon. A yellow callout box with a black border points to these icons, containing the text: 'Use these icons to jump directly to PCC EHR, the Appointment Book, the Import Documents window, or the Practice Management window'.

| Visit Status | Room | Tasks | Arrival | Time | Last | First |
|--------------|------|-------|---------|---------|-------------|--------------------|
| Scheduled | | | | 8:30am | Martin | Matthew M. |
| Scheduled | | | | 9:45am | Karper | Allison L. |
| Scheduled | | | | 10:45am | Jones | Aleksandra |
| Scheduled | | | | 11:30am | Marcano | Megan |
| Scheduled | | | | 2:15pm | Higgins P.C | Mackenzie "Lexi" A |
| Scheduled | | | | 2:45pm | Horricks | Courtney |
| Scheduled | | | | 3:15pm | Spatz | Avarie |
| Scheduled | | | | 3:30pm | Swartz P.A. | Lexi Jordyn |
| Scheduled | | | | 3:30pm | Leff III. | Megan "Lexi" Jean |

Open Multiple Windows in PCC EHR

The screenshot displays the 'Appointment Book' window in the PCC EHR system. The 'Window' menu is open, showing three options: 'PCC EHR', 'Appointment Book', and 'Practice Management'. A red box highlights the 'Window' menu and its options. A yellow callout box with a black border points to the 'Window' menu, containing the text: 'The "Window" drop-down shows you only the windows that are currently open'. The background shows a calendar grid for Sunday, 04/28/19, and Monday, 04/29/19, with a time slot from 8:00 am to 8:45 am. The appointment is for 'Sick Call' by 'Beverly Crusher, M.D.' at 'Winooski Pediatrics' on '04/28/19' at '12:00am' for a duration of '15 min'. The interface includes a 'Find' field, a 'Schedule Appointment' button, and an 'Add Block' button. The 'Appointment Note' field is empty. At the bottom, there are buttons for 'Clear', 'Open Chart', 'Details', and 'Save'.

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 & messaging queues. Also impacts Appt Book provider arrangement.
- This organization will not reflect when picking a user inside a visit

Organize Assigned User Drop Down List

User Administration

Users Roles User Selection List

User Selection List
Arrange the sequence of users in the user selection list.

Auto arrange by last name Keep disabled users on bottom
 Auto arrange by first name
 Manually arrange

Find:

| Enabled | User Name |
|---------|------------------|
| ✓ | Abbott, Joan |
| ✓ | Agent, Computer |
| ✓ | AgentFive, Test |
| ✓ | AgentFour, Test |
| ✓ | AgentOne, Test |
| ✓ | AgentThree, Test |
| ✓ | AgentTwo, Test |
| ✓ | Astle, Tom |
| ✓ | Ballou, Justin |
| ✓ | Beagley, Douglas |
| ✓ | Bergeron, Deb |
| ✓ | Blanchard, Jan |

Choose the format for how user names should be displayed.
User Name Format: Last, First



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

Visit Status Configuration

Visit Status Configuration

| Status | Include in the Visit Status Cycle |
|---------------|-----------------------------------|
| w/Nurse | ✓ |
| Ready-Prov | ✓ |
| w/Provider | ✓ |
| Ready-Nurse | ✓ |
| Breastfeeding | |
| Bathroom | |
| RM | |

Add Delete Edit Close

Add New Visit Status

Visit Status Configuration

Visit Status Configuration - Add

Visit Status:

Button Color:



Text Color:

Include in the Visit Status Cycle

Preview:

Select Color Cancel Save

Visit Status Options on Schedule Screen

| Visit Status | Room | Tasks | Arrival | Time | Last | First | DOB/Sex | Age | Visit Reason | Provider |
|--------------|------|---|---------|---------|--------------|----------|------------|--------|--------------|----------|
| Ready-Prov | - |  | 11:36am | 8:30am | Hamann Train | Adam | 03/05/12 M | 5y 3m | Sick Call | Gomez |
| Arrived | |  | 11:36am | 10:15am | Hamann Train | Brittany | 03/26/06 F | 11y 2m | Sick Call | Casey |

- Ready-Prov
- w/Nurse
- w/Provider
- Ready-Nurse
- Breastfeeding
- Bathroom
- RM

Choose Visit Status Counters in My Account

Visit Status Counters: Arrived, Ready-Prov, Ready-Nurse

- None
- Arrived
- w/Nurse
- Ready-Prov
- w/Provider
- Ready-Nurse
- Breastfeeding
- Bathroom
- RM

Visit Status Counters in the EHR



Patient Forms & Summaries



Generate Form Letters in PCC EHR

- You can add the new Forms component to PCC EHR as a way to print, save, and/or upload forms to the Patient Portal.
- Forms can be configured to be pre-populated with demographic data (and some clinical data)
- Forms can prompt you to enter additional info, rather than entering handwritten data on forms.



Generate Form Letters in PCC EHR

The screenshot shows the PCC EHR interface for a patient named Pebbles Flintstone. The main content area is titled "Medical Summary" and includes several sections:

- Forms:** A section containing two "Generate" buttons for "School/PE Excuse" and "Sports Form", and a dropdown menu labeled "select a form". This section is highlighted with a red border.
- Siblings:** A section with an "Open Chart" button and a listing for "Dino Flintstone 4 yrs, 2 mos 10/31/13 M".
- Reminders:** A section with a "Modified 01/12/18" date and two text entries: "Headed to regional soccer championships 10/11." and "Lost best friend to a neighborhood house fire in 12/10."

The left sidebar contains a navigation menu with the following items: "Medical Summary", "Family Medical History", "Care Plan", "Recent and Upcoming Appts", "Forms" (highlighted with a red box), "Siblings", "Reminders", "Problem List", "Allergies", and "PCC eRx Allergies".

Generate Form Letters in PCC EHR

Generate Form - Sports Form

What is the patient's HEIGHT:

What is the patient's WEIGHT:

What is the patient's BLOOD PRESSURE:

Enter the date of the patient's most recent Tetanus shot:

Generate Immunization Forms in PCC EHR

The screenshot shows the PCC EHR interface for a patient named Pebbles Flintstone, 10 years old, with a last visit date of 11/08/07. The window title is "PCC EHR" and the menu bar includes "File", "Edit", "Reports", "Tools", and "Help". The main content area is titled "Immunization History" and displays a table of vaccines and their dates. A "Print" button is highlighted with a red box.

| Vaccines | 02/11/08 | 04/19/08 | 05/19/08 | 05/11/09 | 11/12/12 |
|----------------|----------|----------|----------|----------|----------|
| DTaP | | | | | |
| Tdap | | | | | |
| Hepatitis A | | | | | |
| Hepatitis B | 12/16/07 | 02/11/08 | 04/19/08 | 05/19/08 | |
| HIB Unspec | 02/11/08 | 04/19/08 | 05/19/08 | 02/09/09 | |
| HPV | | | | | |
| Influenza | 11/14/10 | 09/17/16 | | | |
| IPV | 02/11/08 | 04/19/08 | 05/11/09 | 11/12/12 | |
| Menactra MCV4P | | | | | |
| MMR | 02/09/09 | 12/08/10 | | | |
| MMRV | | | | | |

Configure Patient Visit Summary

- Tools>Patient Visit Summary Configuration allows your practice to configure the data that shows on the printed visit summary
- It's possible to add note components from the visit (e.g. Plan), so that the notes print on the visit summary
- For those using the patient portal, there's a Patient Portal Configuration Tool that allows you to show plan notes on the portal



Configure Patient Visit Summary

Patient Visit Summary Configuration

Display problem notes with problems.

Include checked items on the standard Patient Visit Summary

- Demographics
 - Patient Name, DOB, Sex, and PCC#
 - Patient Race, Ethnicity, and Preferred Language
 - Future Appointments and Date of Last Physical
- Visit Information
 - Allergies
 - Chief Complaint (not configured)
 +
- Clinical Instructions
 - +
- Diagnoses
- Immunizations
- Labs
- Medications
- Orders

Cancel Save

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

Staying Up-to-Date on Features



Designate a “Super Trainer”

- PCC EHR is constantly changing as we add new, exciting features. We hold weblabs for the new releases before the update to show the new features and answer any questions.
- Designating a person (or a few people) who can attend the weblabs for each release and then disseminate that information to your office will help you take advantage of all the new functionality in PCC EHR.



Online Documentation

- PCC EHR online documentation is available 24/7 at: learn.pcc.com
- Stay on top of release documentation by joining PCC Community or scheduling a regular call with your Client Advocate.



Wrap Up & Questions

