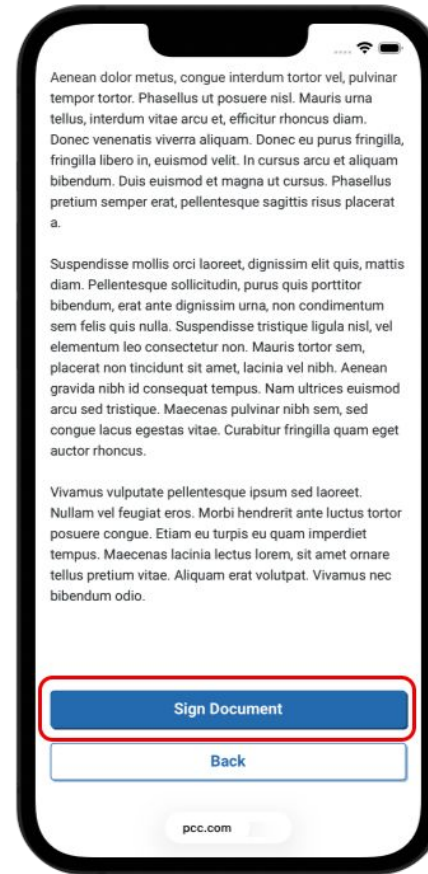
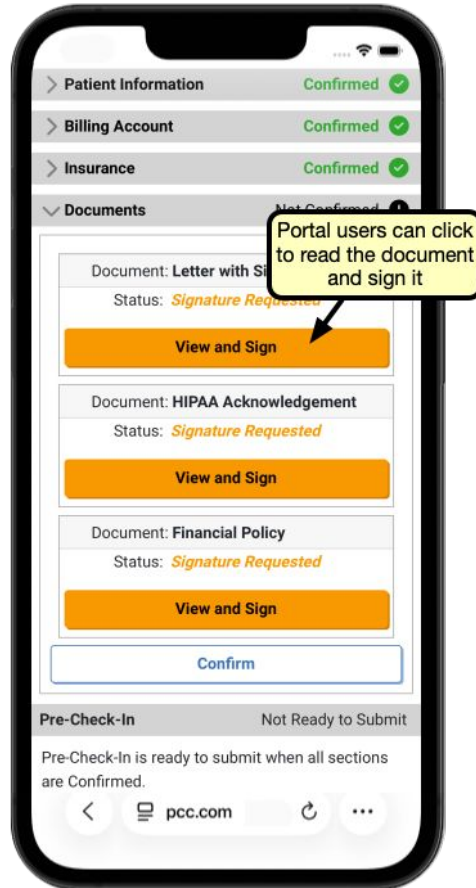
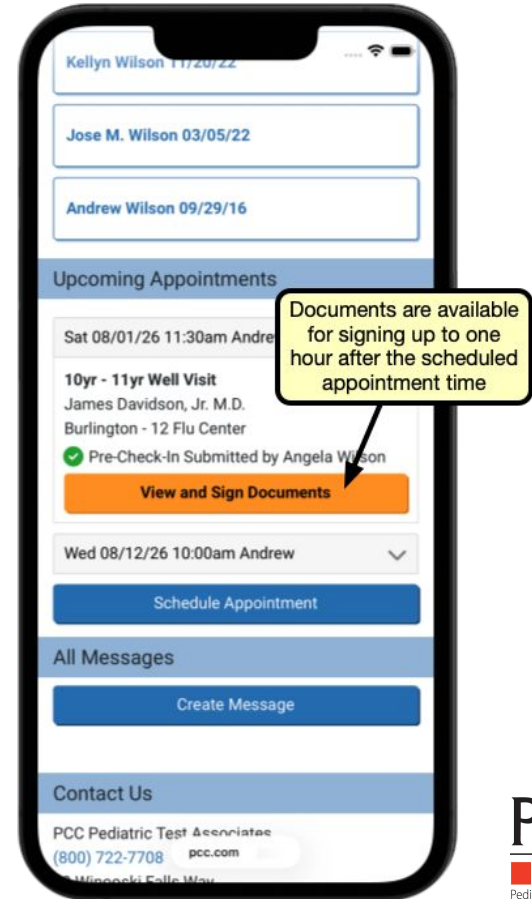
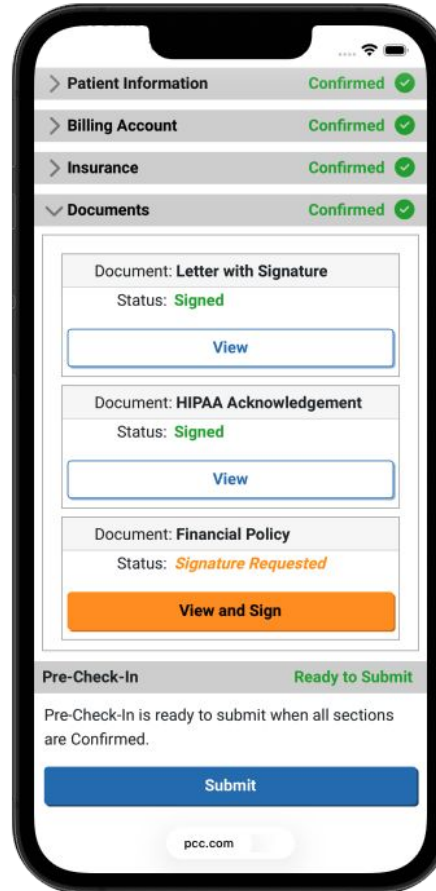
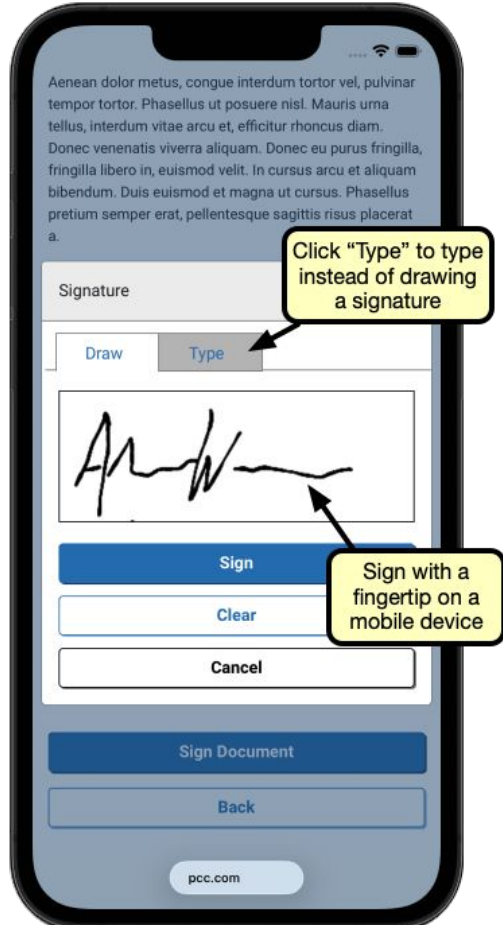


Include Signable Documents in Pre-Check-In



Sign Forms During Pre-Check-In



Signed documents appear within “Pre-Check-In Documents”

If a document has not been signed, **“Signature Required”** and the **Print** button appear in orange.

The family can log back into the Portal to sign OR staff can print the document and have the family sign a hard copy

▶ Pre-Check-In  Confirmed - Information is up to date	
Pre-Check-In Documents	
Documents	Status
 Letter with Signature	Signed, saved to Andrew's documents
 Privacy Policy	Signed, saved to Angela's documents
 Financial Policy	Signature Requested, not saved

Prepare Forms for Signing in Patient Portal

Account Forms Configuration - Edit Form

Form Name:

Active ☒ Inactive ☐

Variables

Search Filter:

Variable Name	Description
Practice Website	Web address for the practice.
Response	Free text with a prompt to be filled out when the form is generated
Signature - Image	Image of the signature of the provider selected as the form signer.
Signature - Provider First Name	First name of the provider selected as the form signer.
Signature - Provider Full Name	Full name of the provider selected as the form signer.
Signature - Provider Last Name	Last name of the provider selected as the form signer.
Signature - Provider License Number	Medical License number of the provider selected as the form signer.
Signature - Provider Middle Name	Middle name of the provider selected as the form signer.
Signature - Provider National Provider ID number	National Provider ID number for the provider selected as the form signer.

Form Content:

3 or more no-shows may result in dismissal from the practice.

5. Past Due Accounts & Collections
Balances due are available in the Patient Portal, and statements are mailed monthly. Payments are due within 30 days of the statement date.

Balances left unpaid after 90 days may be referred to an external collection agency, and an additional collection fee may be applied to your account.

may result in the suspension of non-emergency care or dismissal of your practice.

Patient Acknowledgement
I have read, understand, and agree to the terms of this Financial Policy. I understand that I am ultimately financially responsible for all charges incurred for the children listed below regardless of insurance coverage.

Date:

Footer:
PCC PEDIATRIC TEST ASSOCIATES
10000 E. 10th Ave., Suite 100, Denver, CO 80231
(303) 755-1000
www.pccpa.com

Last Saved: 07/30/2026 3:22pm

Buttons: Cancel, Save, Save + Exit, Insert

- Create Document Groups
- Assign to Visit Reasons
- Set Display Names
- Assign Document Categories for auto-filing
- Set Frequency
- Set Age Range (Patient Forms)

Scheduling Configuration

Visit Reasons | Visit Types | Portal Scheduling | Pre-Check-In Documents | Preferences

Pre-Check-In Documents - Add Document Group

Name:

Assigned to: ▶ 36 Visit Reasons

Forms

▼ Privacy Policy

Account Form:

Display Name:

Category:

Use information from the

Present this form to the Pre-Check-In recipient

▼ School Forms Policy Update

Patient Form:

Display Name:

Category:

Present this form to the Pre-Check-In recipient per patient

☐ Present this form to the Pre-Check-In recipient for patients years through years old

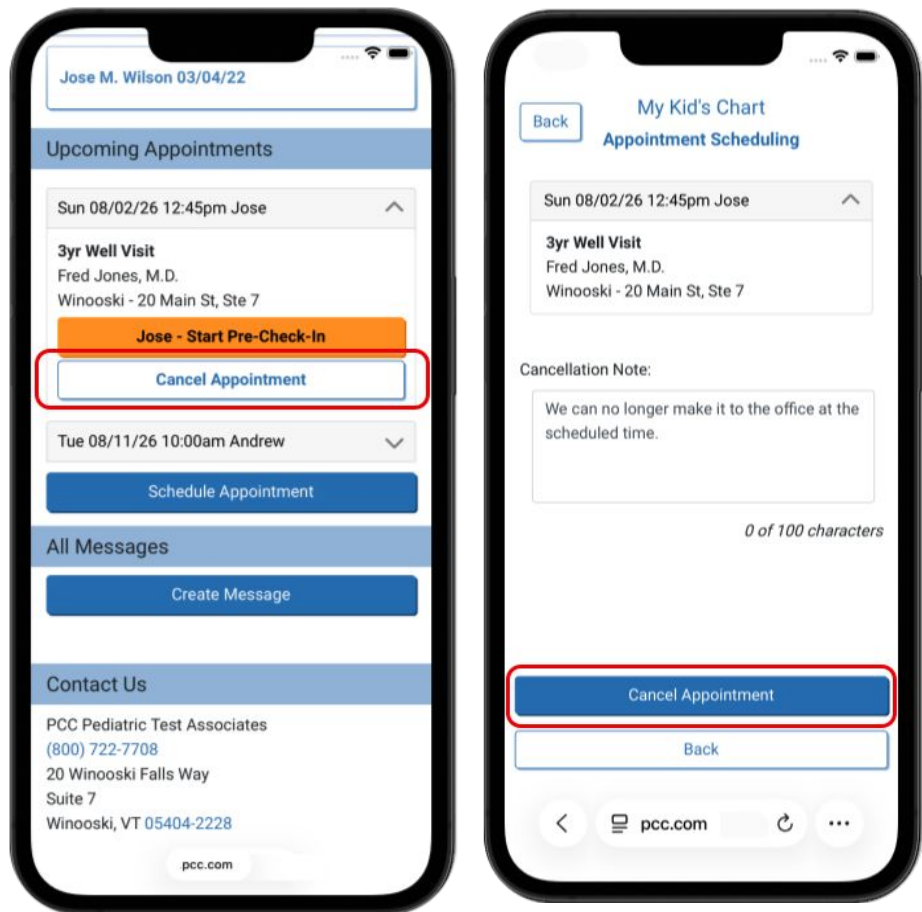
Annotations:

- Name this document, and select a category to be assigned to the completed form
- Select a source to use for form variables
- Select how frequently this form should be included during Pre-Check-In
- If applicable, limit this form to patients within a range of ages

Families Can Cancel Appointments from Patient Portal

When enabled, patient portal users have a “Cancel Appointment” button beneath each upcoming appointment.

While canceling, portal users can optionally include a cancellation note.



Find Appointments Canceled by Portal Users

Appointment History

Appointment History					1 - 7 of 8
Date	Reason	Provider	Location	Removal Reason	
08/02/26 12:45pm Sun	3yr Well Visit	Fred Jones, MD	Winooski Pediatrics	Canceled by Patient	
07/31/26 10:00am Fri	3yr Well Visit	James Davidson, MD	Burlington Peds - Old North End		
07/28/26 3:37pm Tue	Sick Call	Elizabeth Casey, MD	Lake Champlain Pediatrics		
05/28/26 6:15pm Thu	Sick Call	Mark Williams, MD	Burlington Peds - New North End		
03/23/26 6:15pm Mon	4yr Well Visit	Mark Williams, MD	Burlington Peds - New North End		
02/04/26 10:15am Wed	Sick Call	Mark Williams, MD	Burlington Peds - New North End		
10/19/25 2:00pm Sun	Sick Call	Mark Williams, MD	Burlington Peds - New North End		
▼ Details					Restore Reschedule Edit
Appt Note:					
Removal Note: We can no longer make it to the office at the scheduled time.					
Scheduling Details: Removed by portal user Daniel Wilson on 07/30/26 at 5:02pm Scheduled by PCC PCC on 07/30/26 at 4:50pm					

Report Library

Appointments Canceled via Patient Portal								
Review appointments canceled yesterday via the patient portal.								
Appointment Status: Canceled Appointments / Blocks: Appointments Only Appointment Cancellation Method: Portal Appointment Removal Date: From 09/14/2026 to 09/14/2026								
Columns: 9 Displayed		Group By: None		Search Filter:				
Appointment Date	Appointment Time	Appointment Provider	Patient Name	Appointment Reason	Appointment Cancellation Method	Appointment Removal Date	Appointment Removal Note	Last Scheduling Action
09/17/2026	8:15am	Alfred Woodward, M.D.	Bauer P.A., Garrett S	Pre-op exam	Portal	09/14/2026	They bumped Garret's surgery date. Need something next week.	Removed by portal user William Bauer on 09/14/26 at 2:34pm
09/17/2026	8:30am	Alfred Woodward, M.D.	Bahm, Isha	Test Pink/Short 5 min	Portal	09/14/2026	Conflict with dentist appointment.	Removed by portal user William Bauer on 09/14/26 at 2:33pm
09/17/2026	8:45am	Alfred Woodward, M.D.	Pietro, Corey	Medication Followup	Portal	09/14/2026	Corey has a basketball game that day. Can we reschedule?	Removed by portal user William Bauer on 09/14/26 at 2:33pm
09/17/2026	9:00am	Alfred Woodward, M.D.	Proietto, Bradley E.	Sick Call	Portal	09/14/2026	Went to urgent care	Removed by portal user William Bauer on 09/14/26 at 2:31pm

You can prevent selected visit reasons from being canceled, or limit how close to the scheduled time an appointment can be cancelled.

Configuration

Messaging Templates

Patient Portal Configuration

Age-based privacy
Hide patient data beginning at age years

Display in the Patient Portal

- ☒ Allergies
- ☒ Appointments and Date of Last Physical
 - ☒ Allow portal users to cancel appointments
Portal users can cancel any future appointment at any time.

Exceptions: Require the portal user to call your practice to cancel certain appointments.

Description	Visit Reasons	Portal Cancellation Limitations
Well Visits	26 Visit Reasons	Allow up to 48 Hours Prior

Add

Edit

Delete

Open the Report Library Faster

Find the reports you need faster and more easily with a new category layout in Report Library.

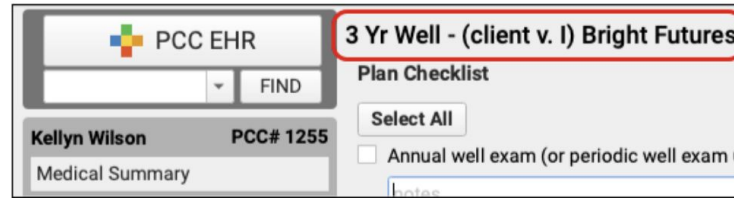
The screenshot displays the 'Report Library' interface. At the top, there are tabs for 'Reports', 'Scheduled Reports', and 'Saved Results'. Below these, the 'Reports' section is active, showing a search filter and a list of reports categorized by a sidebar menu. The sidebar menu includes categories like 'All Reports', 'Appointment', 'Billing', 'Clinical', 'Communication', 'Data Source', 'Financial Oversight', 'Front Desk', 'Immunization', and 'Patient'. The 'Appointment' category is selected, and the 'Huddle Sheet' report is highlighted. A mouse cursor is pointing at the 'Huddle Sheet' report. The report details are shown in a table with columns for 'Name' and 'Description'.

Categories	Name	Description
All Reports		together, reflected as Scheduled by Portal User .
Appointment	Forced Appointments	Find all appointments which are currently forced in.
	Forced Appointments - Custom	Appointment date is next 60 days, provider working hours out
Billing	Forced Appointments - custom, includes scheduled by column	Find all appointments which are currently forced in.
Clinical	Huddle Sheet	View today's appointments with relevant details to help plan for the day.
Communication	Huddle Sheet - Custom	appointment date next 7 days, removed appt note from columns to include, location winooski peds
Data Source	Huddle Sheet - custom, includes scheduled by column	View today's appointments with relevant details to help plan for the day.
Financial Oversight	Portal Users by Relationship	Find portal users by their relationship to linked patients.
Front Desk	Provider Schedule Utilization	View the utilization of provider scheduling resources with the ability to break down by appointment status. Appointments occurring outside of the shift time will not be counted.
Immunization		
Patient		

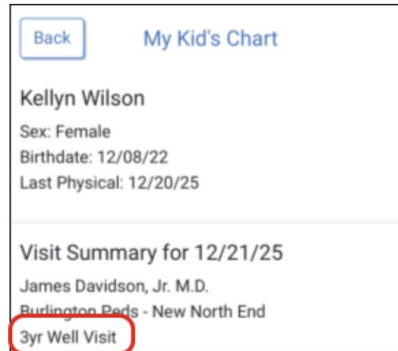
Manage Categories Close

Clearer Labeling for Visits in Patient Portal

Visits are now labeled only with the Visit Reason or Portal Display Name in the Visits component and Visit Summary.



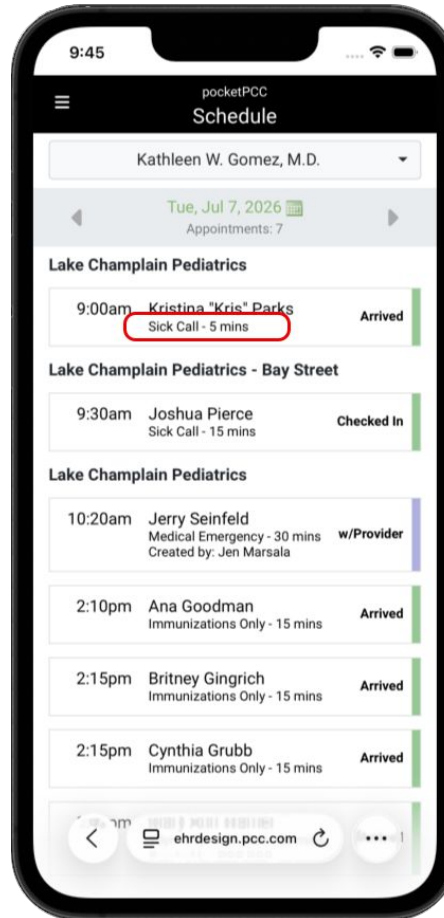
This screenshot shows the PCC EHR interface. At the top left is the PCC EHR logo. Below it is a search bar with a dropdown arrow and a 'FIND' button. To the right of the search bar is a red-bordered box containing the text '3 Yr Well - (client v. I) Bright Futures'. Below the search bar, the patient's name 'Kellyn Wilson' and PCC# '1255' are displayed. Below that is a 'Medical Summary' button. To the right of the patient information is a 'Plan Checklist' section with a 'Select All' button and a checkbox for 'Annual well exam (or periodic well exam u'.



This screenshot shows the Patient Portal interface. At the top left is a 'Back' button. To its right is the text 'My Kid's Chart'. Below this is the patient's name 'Kellyn Wilson', followed by 'Sex: Female', 'Birthdate: 12/08/22', and 'Last Physical: 12/20/25'. Below a horizontal line is the section 'Visit Summary for 12/21/25', which includes 'James Davidson, Jr. M.D.' and 'Burlington Beds - New North End'. At the bottom, the text '3yr Well Visit' is highlighted with a red circle.

View Appointment Durations in pocketPCC

The Schedule screen in pocket PCC now includes more information about each visit, so you can review your whole day at a glance.



More Transcription Options for PCC Scribe

Use pocketPCC on any device to transcribe audio for PCC Scribe. This is useful if you can't connect to a microphone within PCC EHR, or if you just want flexibility in your workflow.

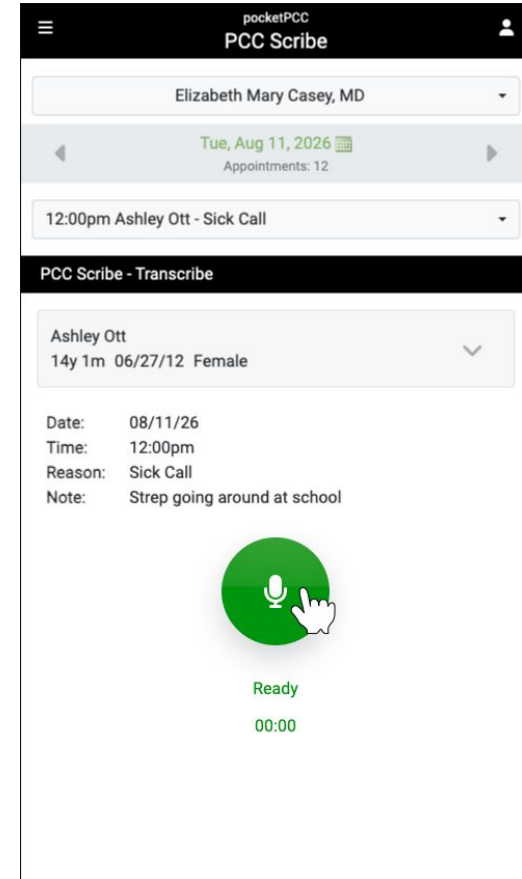
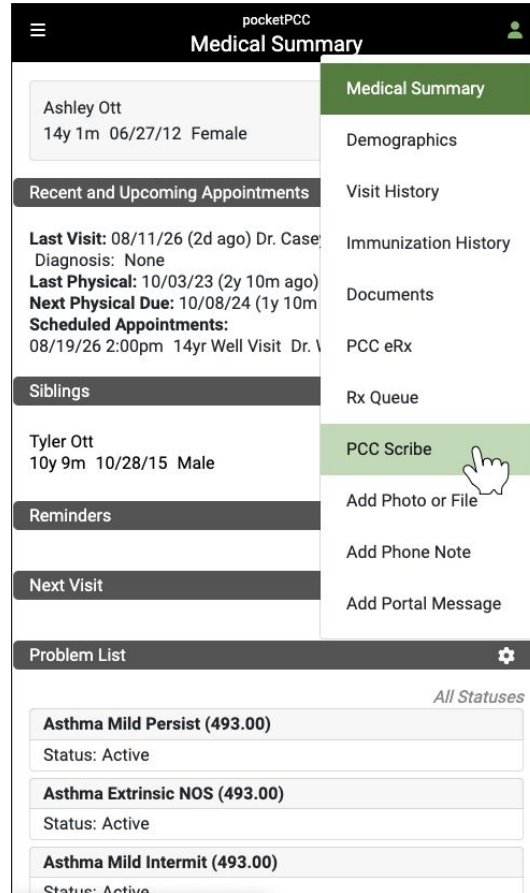


Chart Sibling Visits with PCC Scribe

 PCC EHR

Torrance Twin PCC# 3488

Medical Summary

Demographics

History

Billing

Sick - Bright Futures

 Listen 00:00  Scribe

Appointment Details

Visit Status: Ready-Prov Room: 4

Appt Time: 8/11/26 11:45am

Arrival Time: 8/11/26 11:46am

Visit Reason: Sick Call

Visit Summary:

Torrance "Tori" Twin II 8 yrs, 3 mos 04/28/18 F

Visit Summary:

 PCC EHR

Thomas Twin PCC# 3487

Medical Summary

Demographics

History

Billing

PCC eRx

Sick - Bright Futures

 Currently Recording Torrance Twin

Appointment Details

Visit Status: w/Provider Room: 4

Appt Time: 8/11/26 11:45am

Arrival Time: 8/11/26 11:46am

Visit Reason: Sick Call

Visit Summary:

Torrance "Tori" Twin II

Thomas "Tommy" Twin II

See the whole family while PCC Scribe transcribes the visit on one patient's chart

8/18 M

Visit Summary:

Chart Sibling Visits with PCC Scribe

PCC EHR

Torrance "Tori" Twin II Thomas "Tommy" Twin II

Sick - Bright Futures Thomas "Tommy" Twin II 8 yrs, 3 mos 04/28/18 M

Thomas Twin PCC# 3487

Medical Summary

Demographics

History

Billing

PCC eRx

Listen 00:00 Scribe

Appointment Details

Visit Status: w/Provider Room: 4

Appt Time: 8/11/26 11:45am

Arrival Time: 8/11/26 11:46am

Visit Reason: Sick Call

Visit Summary: Print Decline

Print Visit Forms

Scribe

Scribe Thomas "Tommy" Twin II 8 yrs, 3 mos 04/28/18 M

Draft Chart Note Transcript

Scribe - Draft Chart Note

Encounter: Sick Call 08/11/26 11:45am Protocol: Sick - Bright Futures

Template: Sick Generate

Context and Instructions:

A transcript is needed in order to generate.

Import Transcript from Torrance Twin's Encounter: Sick Call 08/11/26 11:45am

Listen 00:00 Draft Quality: ☆☆☆☆☆ Close Update Encounter

Scribe

Scribe Thomas "Tommy" Twin II 8 yrs, 3 mos 04/28/18 M

Draft Chart Note Transcript

Scribe - Draft Chart Note

Encounter: Sick Call 08/11/26 11:45am Protocol: Sick - Bright Futures

Template: Sick Generate

Context and Instructions:

Listen 09:17 Draft Quality: ☆☆☆☆☆ Close Update Encounter

Chart Sibling Visits with PCC Scribe

Scribe

Scribe

Thomas "Tommy" Twin II 8 yrs, 3 mos 04/28/18 M

Draft Chart Note

Transcript

Scribe - Draft Chart Note

Context and Instructions:

This note is for Tommy

Encounter: Sick Call 08/11/26 11:45am

Protocol: Sick - Bright Futures

Template: Sick

Regenerate

Component: Assessment Notes

Nontoxic child with no respiratory distress or signs of dehydration.
Likely diagnoses:
- Influenza A (J10.1)

Component: Plan Details

- Prescribe Oseltamivir (Tamiflu) for 5 days.
- Alternate ibuprofen and acetaminophen every 4-6 hours as needed for cough and body aches.
- Give 1 teaspoon of honey before bed to soothe the dry cough.
- Reasons to return or seek emergency care:
 - Labored breathing, including very fast breathing or chest retractions (ribs pulling in tightly when inhaling).
 - Signs of dehydration, such as going more than eight hours without urinating or having no tears when crying.

Listen

09:17

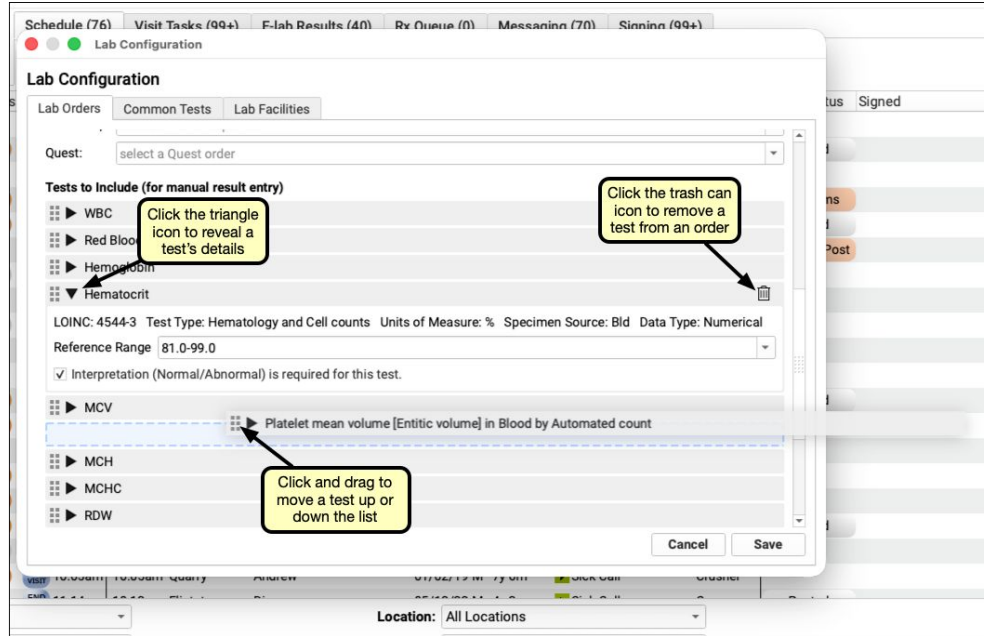
Draft Quality: ☆☆☆☆☆

Close

Update Encounter

Rearrange the Order of Lab Tests With A Few Clicks

The sequence of tests matters, and now your practice can review and rearrange lab tests with a few clicks. So when a LOINC code is deprecated, or a lab test has been added in the wrong order, you can fix your in-office labs quickly, without the monotony of rebuilding the entire lab.



Email your Client Advocate to learn more!

support@pcc.com