Care for Patients Monthly Drop-In

Tuesday, February 21
1:00-2:30pm ET

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Our Team's Products & Services

- Patient Charting
- Communicating with Patients
- Patient Portal
- CHADIS
- Appointment Book
- Check-In
- Protocol/Component Configuration
- Orders Workflow
- Referrals
- AAP Patient Education
- pocketPCC

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Purpose of the Drop-In

- A chance to network with each other
- Ask questions of each other and PCC
- Input into our development of PCC products
    - If it's not something our team develops, we will share your feedback with the appropriate PCC team(s)

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Today’s Drop-In Topics

1. Design Preview
2. Portal Configuration
3. Patient Portal Usage
4. Portal Messaging Templates
5. Open Q&A

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Design Preview

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Patient Portal Messaging & Configuration

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Patient Portal Configuration

- Your practice can configure what details and options appear in your patient portal.
- The portal offers some optional features, like Portal Payments and Messaging Templates.

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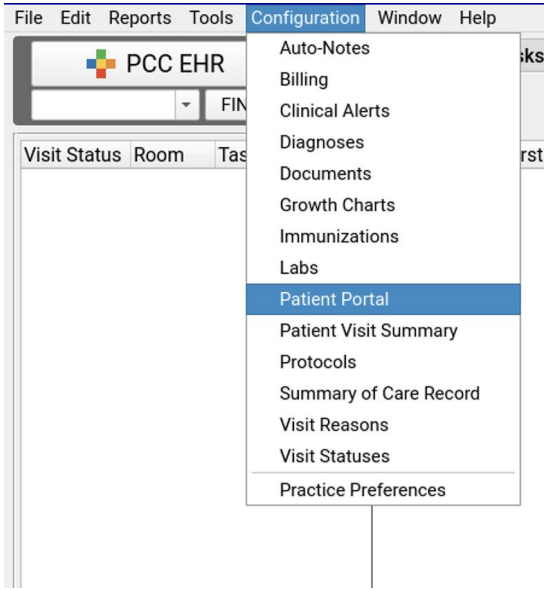
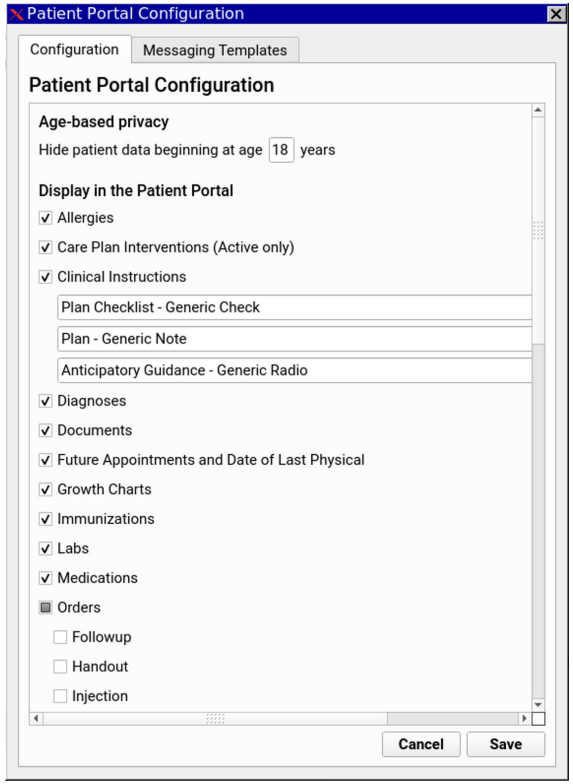
Patient Portal Configuration





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Patient Portal Configuration

- The vast majority of PCC clients (84%) have their emancipation age set to 18 years of age. Only 12% of our clients have the age less than 18, and some go as low as 12 years of age.
- Nearly ⅔ of PCC practices (65%) use the Portal Payments feature.
- For practices that display labs (82%), patients can print copies of their lab results for sharing with schools and other entities that require proof of a lab test result.

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Patient Portal Usage

- PCC offers resources that support the usage of the Portal at our practices.
  - Patient Portal Starter Kit
    - Handout: Reasons to Use The Portal
    - My Kid's Chart User Guide
    - Sample Portal Registration Form

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Patient Portal Usage

- Patient Portal Flyer

Our Patient Portal is Here

Sign Up Now

Speak with a member of our staff to start using
https://practice.pcc.com/portal

Access your child's medical records on your smartphone, tablet or PC.

Adding Convenience to Your Life

Life is busy. Juggling your day-to-day and staying on top of your family's health care can be a challenge, but we've set up our new portal to help. Our practice's online tool at: https://allstarr.pcc.com/portal lets you communicate with us easily, any time and from anywhere.

You can access your child's medical records on your smartphone through Practices' secure patient portal at https://practice.pcc.com/portal.

Using your secure password and user ID, you can log into our practice at https://practice.pcc.com/portal 24/7 from your home or office. All you need is a mobile phone, tablet device or a computer with internet access.

Information You Can Access Through My Kid's Chart

When you access our patient portal, you can review a complete health information summary for each child in your care, including:

- Most recent physical date
- Upcoming appointments
- Historical visits
- A summary of labs and medical tests
- A problem list, allergy list and medications list
- A complete immunization record

You can download or print your child's immunization record directly from Practices' portal at https://practice.pcc.com/portal, and you can review a detailed visit summary for any appointment.

Secure Messaging and Online Bill Pay

You will be able to communicate with your pediatrician by sending and receiving secure messages via our portal.

You can pay your bill through the portal at any time.

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Practice Name
Street
City State Zip
Phone

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Patient Portal Usage

Portal usage across our practices

	Total	Avg	Median
Active Patients	1912356	7441.07	4650
Patients w/Portal User	1298915	5054.14	2937
% Portal Users	67.92%	67.92%	63.16%
Patients w/Portal Msg Past Yr	484116	1883.72	935
% Msg	25.32%	25.32%	20.11%
Patients w/Portal Login Past Yr	928553	3,613.05	2103
% Login	48.56%	48.56%	45.23%

n=257

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Portal Messaging Templates

- Since Portal Messaging templates have been available, PCC clients have made widespread use of this feature.
- Many clients use more than the standard (4) available templates:
  - Appointment Request
  - Medication Refill Request
  - Referral Request
  - Other
    - *“Other” was made available for editing as of PCC EHR 9.4*

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Portal Messaging Templates

- Some other templates created by PCC clients:
  - Form Requests
  - Billing Questions
  - Insurance Card
  - ID/Driver's License
  - HSA Receipt Request
  - Telemedicine Consent
  - Upload Previous Medical Records
  - Provider-Specific Messaging
  - Financial Policy
  - Demographics Update
  - Patient Screening (M-CHAT, Depression, etc.)
  - COVID Screening
  - Test Result Questions
  - Privacy Policy
  - Immunization Record Request
  - Medical Record Request
  - Lactation Support

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Portal Messaging Templates

Building a Portal Message Template

- Determine who should receive the inbound messages
- Decide what information you need to gather
- As you create the template:
  - Preview it often
  - Test the data entry experience
  - Review how the inbound message looks in the EHR

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Portal Messaging Templates

Portal Messaging Template Components

- **Agreement:** Adds the option to upload a document, such as a policy document, and the option for the user to electronically sign the document.
- **Appointment Date:** Adds a Calendar selection tool to your template. The selected date will default to the current date.
- **Appointment Location:** Creates a drop-down selection field that includes all of your practice's scheduling locations. An "Any Location" option will also be included and selected by default.
- **Appointment Provider:** Creates a drop-down selection field that includes all of your practice's scheduling providers. An "Any Provider" option will also be included and selected by default.
- **Attachment:** Adds the option to attach an image or PDF file, and a text field for a label.
- **Block of text:** Display-only sentence or paragraph. Use this to create an introduction, instructions, or comment.
- **Checkbox list:** Creates a list of custom checkbox items. Any or all of the options may be selected. None of the boxes will be checked by default.
- **Dropdown list:** Creates a drop-down selection field where one choice can be made from a list of options you create. PCC recommends using this field type for lists with three to ten options. The field will be blank by default.

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Portal Messaging Templates

Portal Messaging Template Components (cont'd)

- **Input box-large:** Creates an expanding entry field within which the portal user can input several lines of text. This field type is recommended when you want a sentence or paragraph length answer.
- **Input box-small:** Creates an entry field within which the portal user can enter one line of text. This field type is recommended when you want a one-word or short answer.
- **Medication Allergies:** Displays a bulleted list of the patient's active medication allergies, followed by radio buttons for the portal user to verify the allergies or provide updates. If the portal user indicates that the list needs updating, an entry field will appear in which they can enter comments. Nothing will be automatically updated; the updated information will need to be manually added to the patient's chart.
- **Medication To Refill:** Displays a checkbox list of active medications from the patient's Medication History. Any or all of the options may be selected. None of the boxes will be checked by default. Additionally, entry fields are included for the portal user to record additional medications they want refilled, and the name and location of the pharmacy they want to use.No prescriptions will be automatically generated; a prescriber will need to manually create the medication refill, if appropriate.
- **Radio button list:** Creates a radio button selection field where one choice can be made from the options you create. Nothing will be selected by default.
- **Title:** Display-only larger sized bold text. Use this to create a form title and for section headings.

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Portal Messaging Templates

Agreement Component

- Created with the intention of speeding up your check-in process.
- Patients can review and electronically sign policy documents before they arrive.

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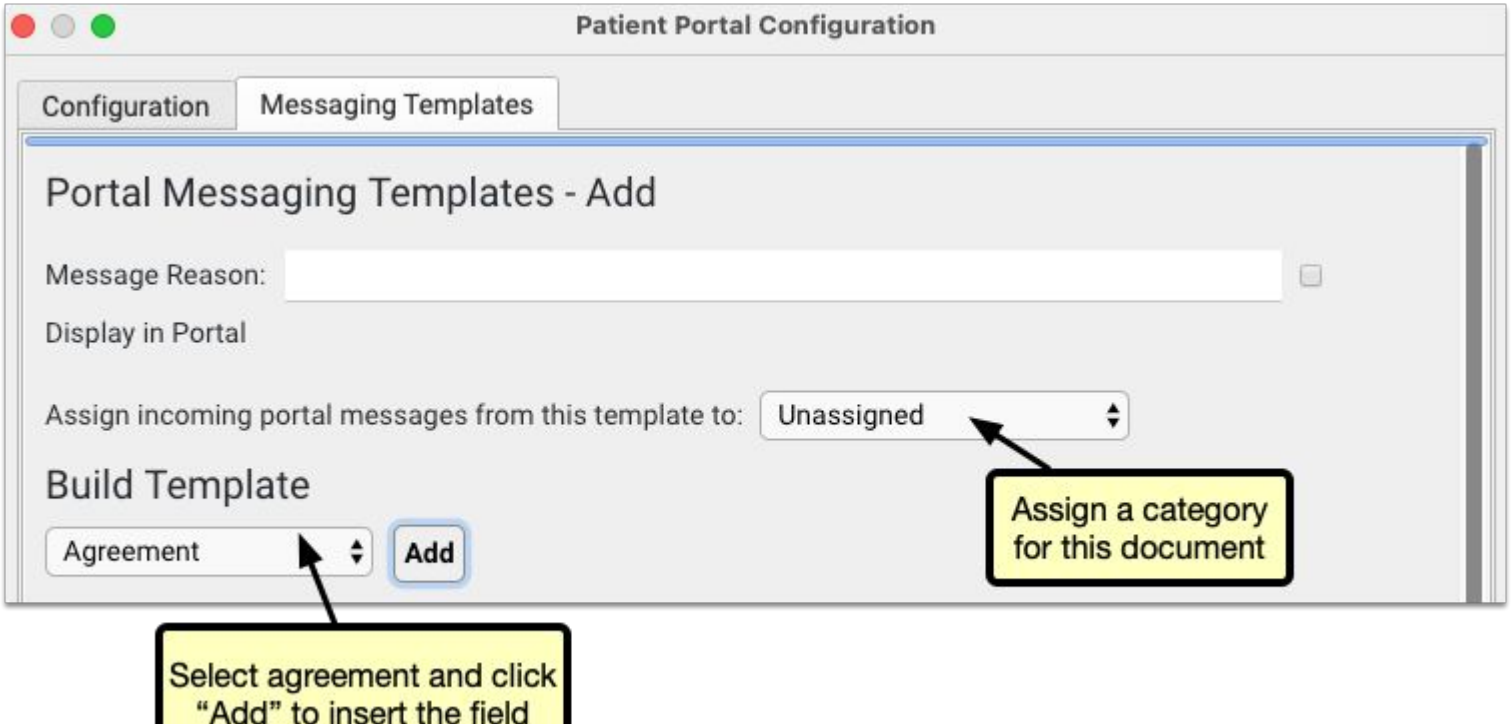
Portal Messaging Templates

1. Add the Agreement component to a template



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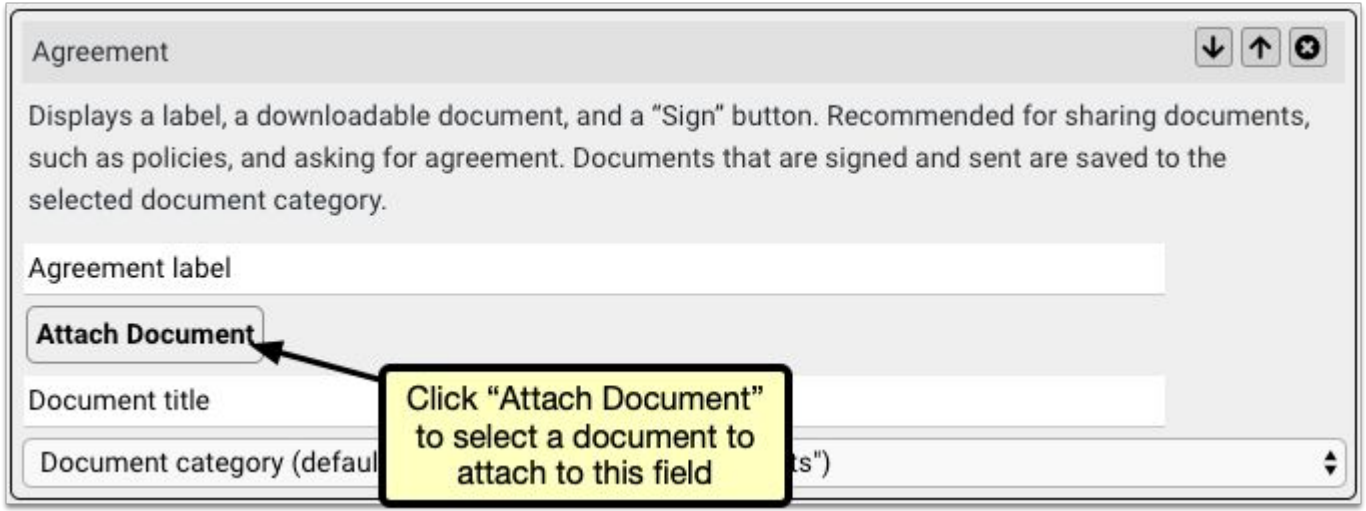
Portal Messaging Templates

2. Attach a document for agreement/signature



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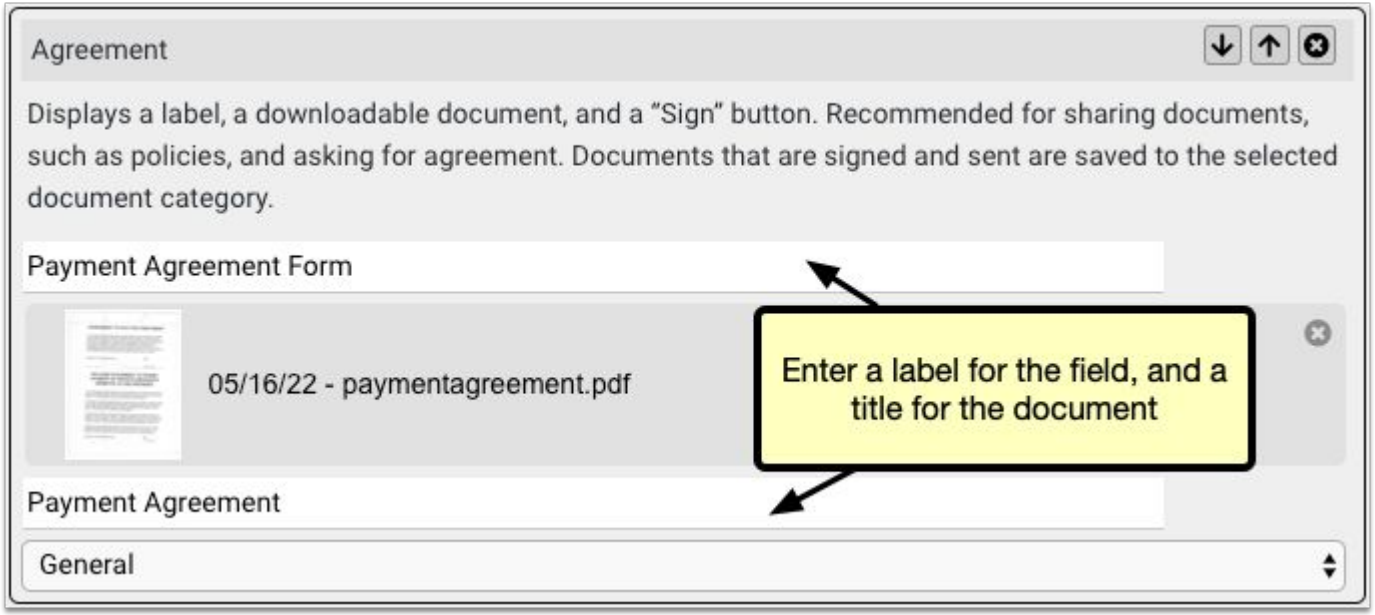
Portal Messaging Templates

3. Add a field label and document title



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Portal Messaging Templates

4. Portal users review and electronically sign the document

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Open Q&A

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