Managing Complex Family Structures within PCC EHR

Jim Leahy
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Agenda

- Review family structures in PCC
- Review features that you can use to assist with complex family setups, including:
  - Personal Contacts
  - Flags/Reminders/Alerts
- Review Patient Portal & information sharing
- Discuss & share best practices, processes and policies
Goals

By the end of the course, participants will:

○ Understand how families are structured in PCC
○ Be aware of ways to build and document complex family structures in PCC
○ Be aware of how information is shared with families through the Patient Portal
○ Better understand how to document complex family structures in PCC
Family structures

- PCC is a family billing system
- Patient database
- Account database
  - Custodian/Home Account
  - Guarantor/Billing Account
- Documenting changes in family structure
Demographics

- Patient demographic fields
  - Custom fields - searchable
  - Communication preference
- Account demographics
  - Custom fields - searchable
Flags

- Patient Flags
- Account Flags
- Flagset functions in letters/forms
EHR Clinical Alerts

- Demographics criteria
- Periodicity for alerts
- Alerts by role & functional area of EHR
EHR & Partner Notes

● Medical Summary reminders
● EHR Demographics notes boxes
● Partner notes
  ○ fame
  ○ notjane
  ○ Account history/oops via forms & letters
EHR Personal Contacts

- Adding Personal Contacts to EHR
- Authorized Contacts
- Adding Personal Contacts component to protocols (Phone notes, portal messages, etc.)
Patient Portal

- Portal users vs EHR/Partner accounts
- Information sharing with Portal Users
Wrap Up & Questions