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

Jim Leahy
Physician's Computer Company

PCC Pediatric EHR Solutions

THRIVING THROUGH CHANGE

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

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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

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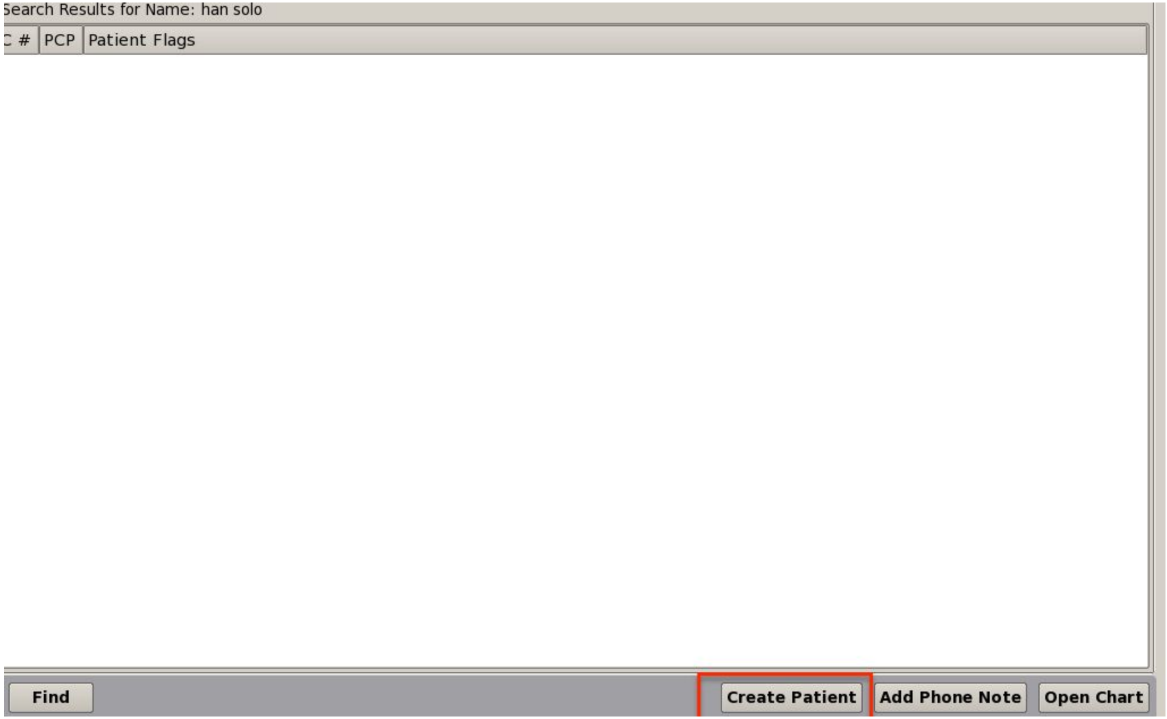
Add Patient



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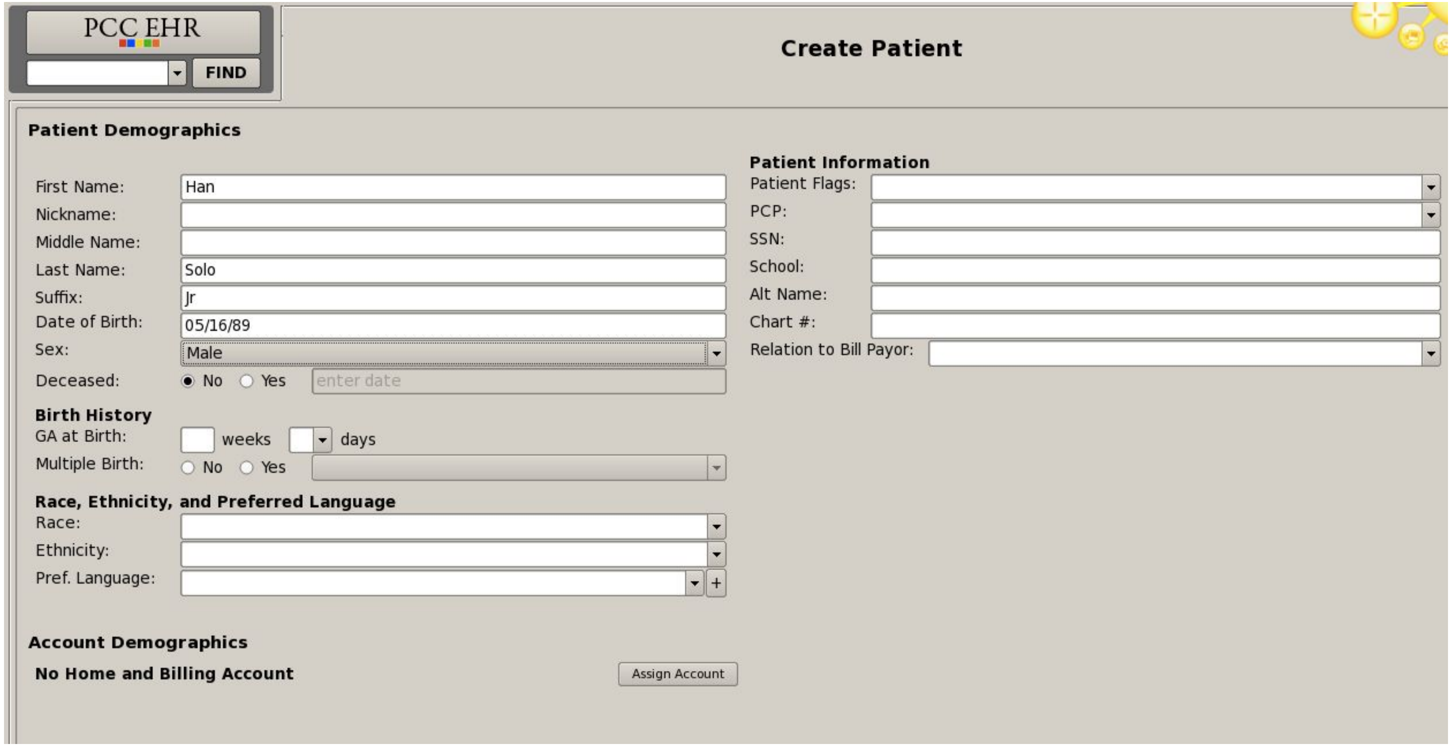
Add Patient



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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,VT05404

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

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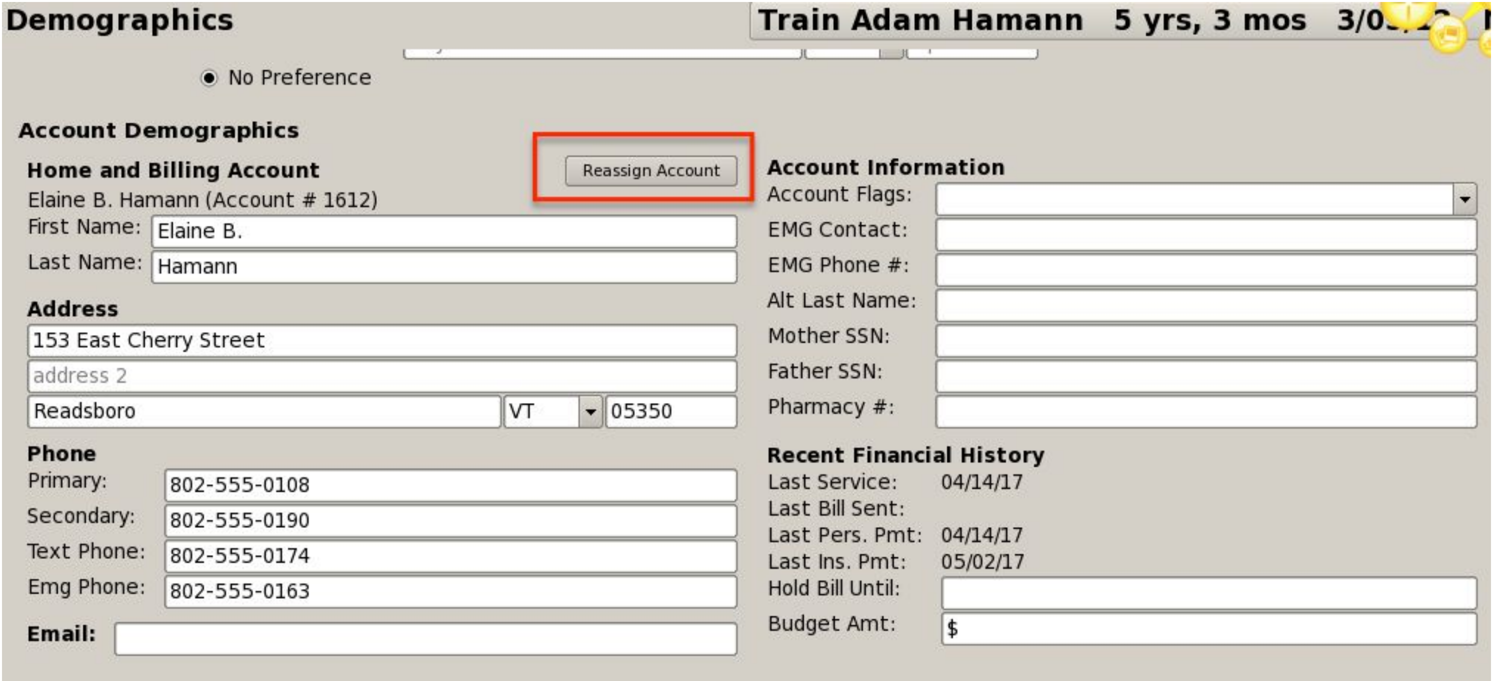
Reassign Patient Account(s)



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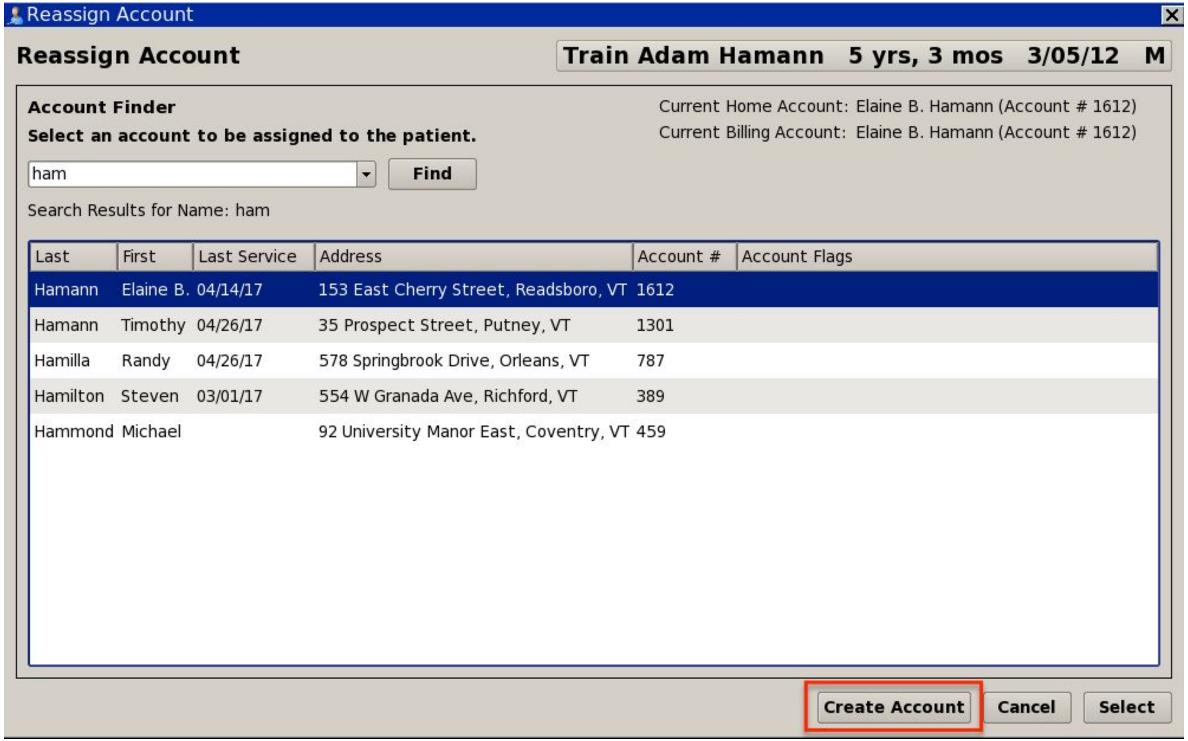
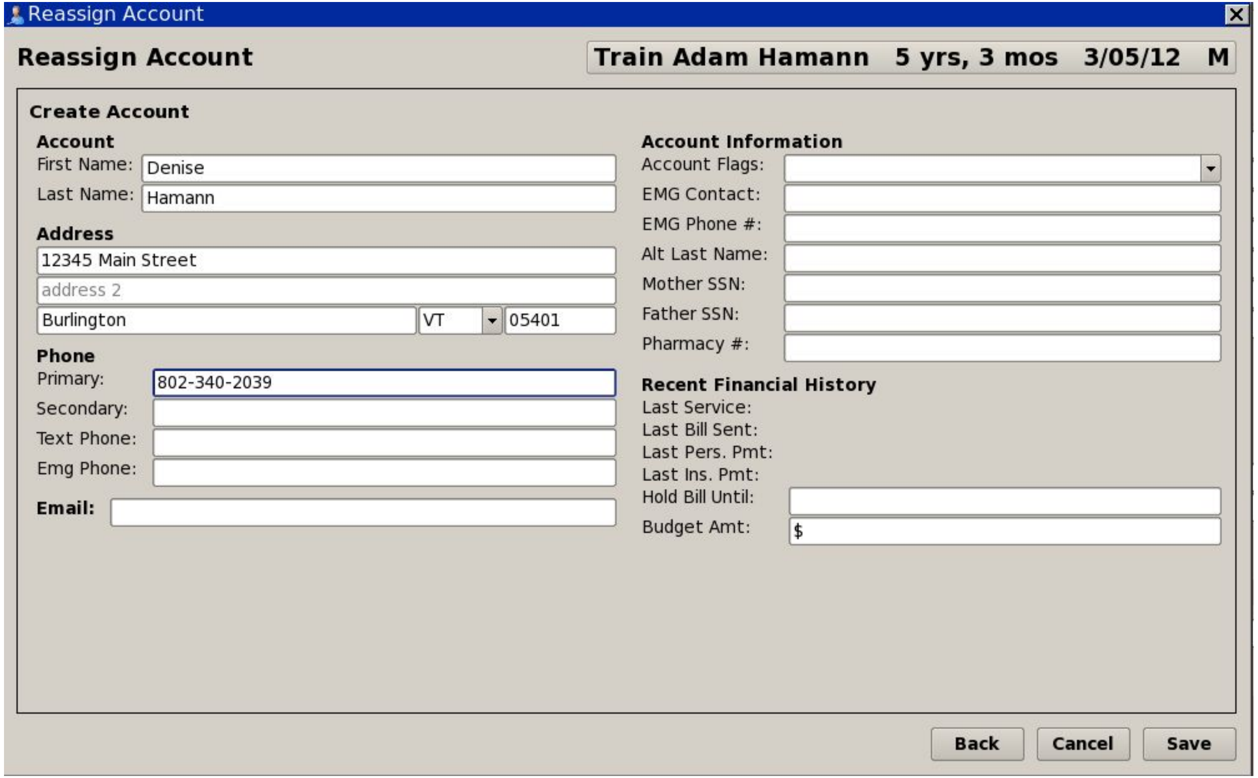
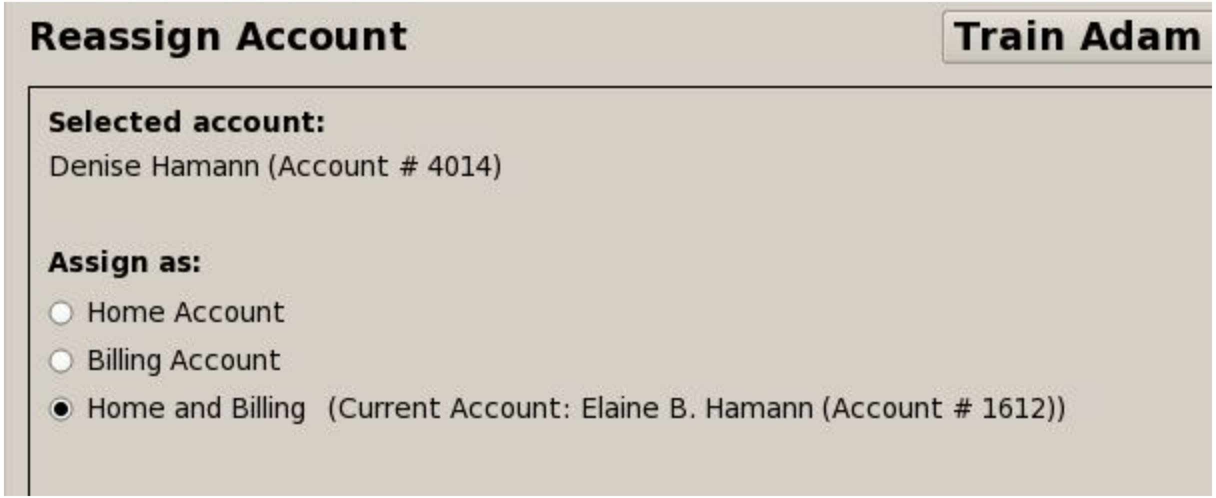
Add New Account



Add New Account



Reassign Account Options



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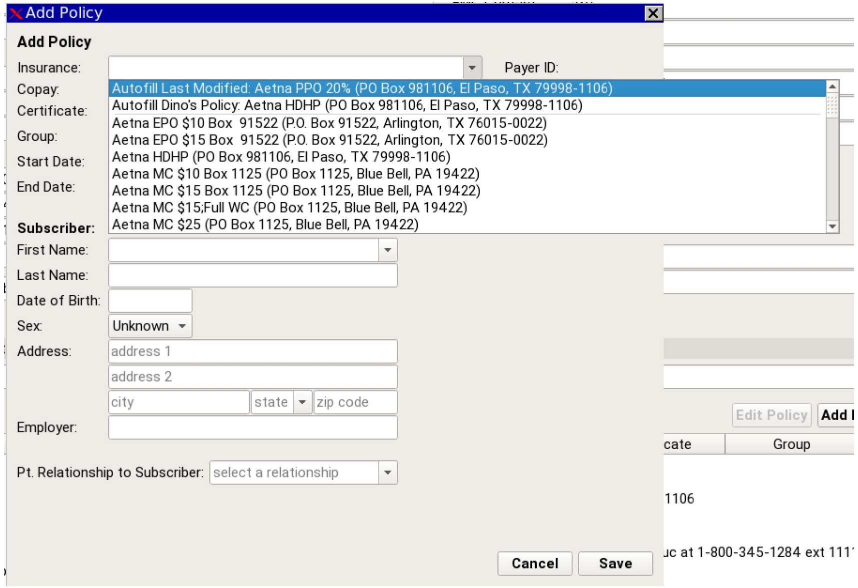
Policies in PCC EHR

- 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



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

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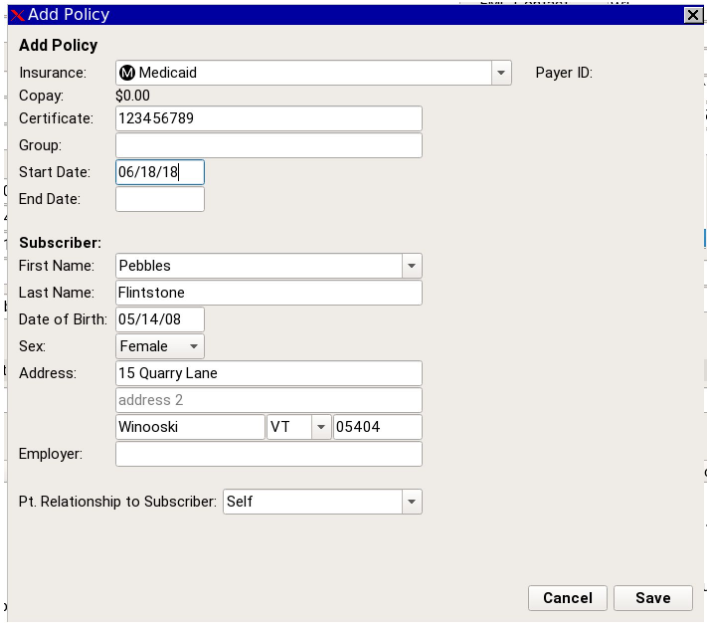
Policies in PCC EHR


Add Policy

Add Policy

Insurance: Ⓜ Medicaid Payer ID:
Copay: $0.00
Certificate: 123456789
Group:
Start Date: 06/18/18
End Date:

Subscriber:
First Name: Pebbles
Last Name: Flintstone
Date of Birth: 05/14/08
Sex: Female
Address: 15 Quarry Lane
address 2
Winooski VT 05404
Employer:

Pt. Relationship to Subscriber: Self

Cancel Save

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

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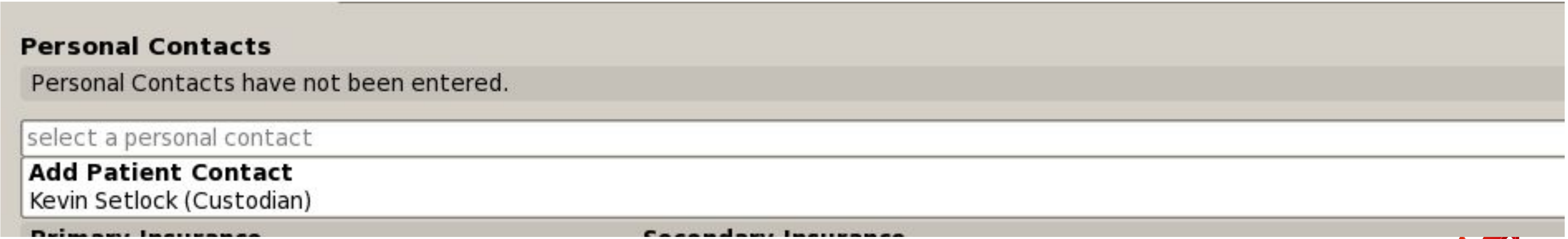
Personal Contacts

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



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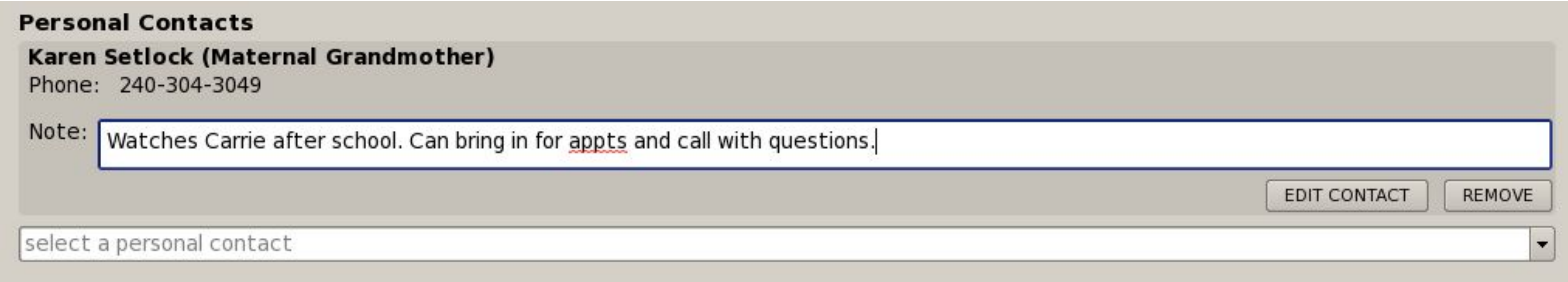
Personal Contacts



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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

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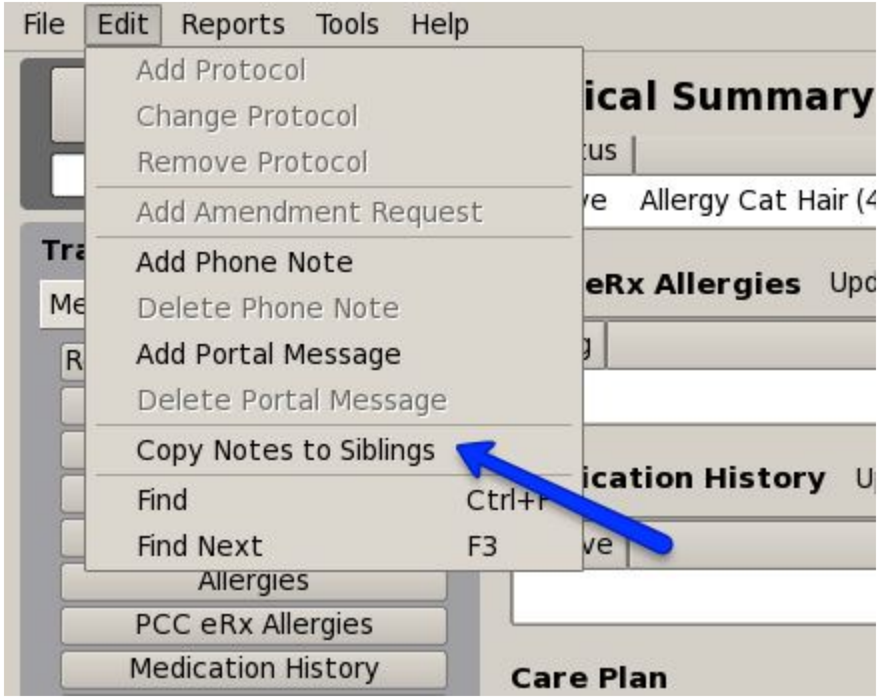
Copy Notes to Siblings



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Copy Notes to Siblings

Family Medical History Modified 06/17/16

Condition	Relationship	Note
Eczema	Brother	
Anemia	Maternal A	
Epilepsy	Maternal Uncle, Mother	

Copy Family Medical History to Siblings

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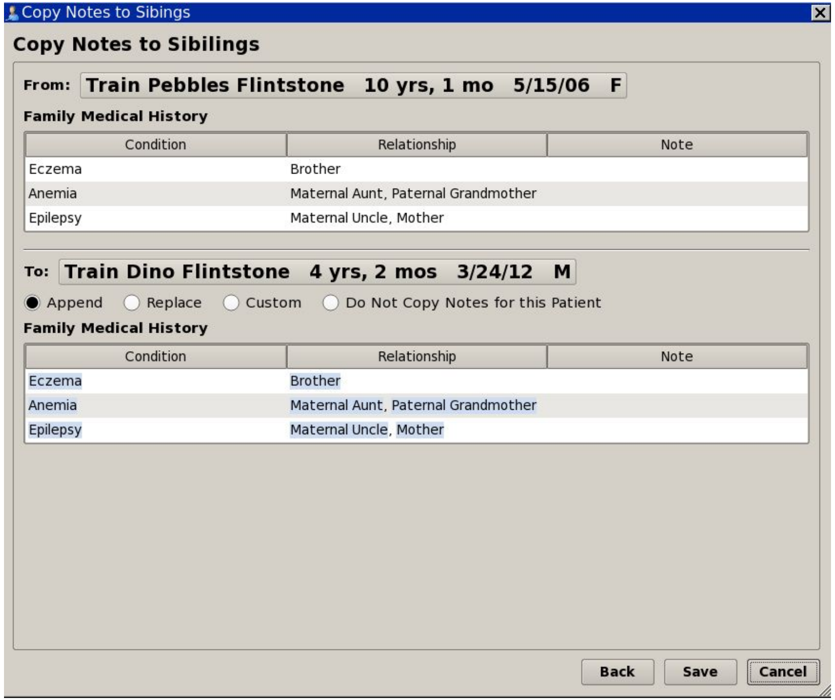
Copy Notes to Siblings



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Working with Documents

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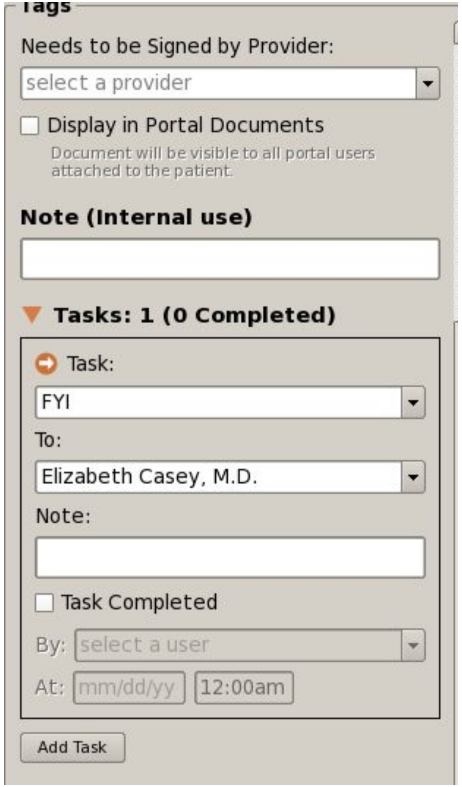
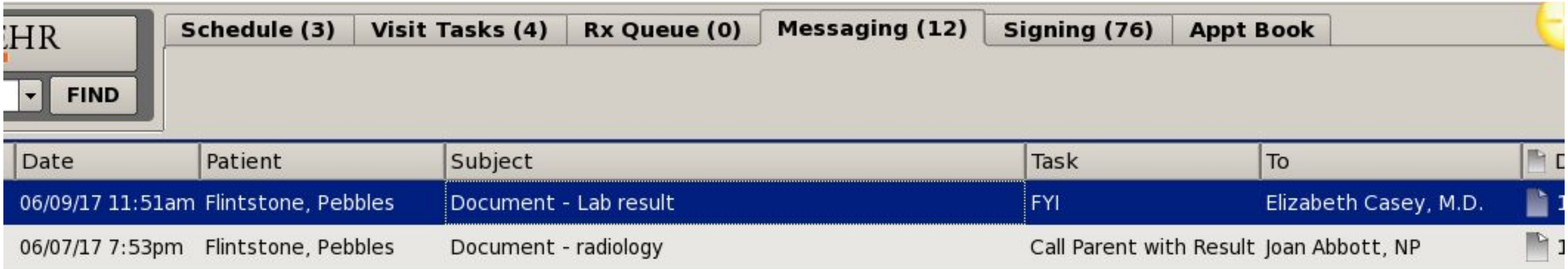
Documents in PCC EHR

- 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



Document Task in Messaging Queue



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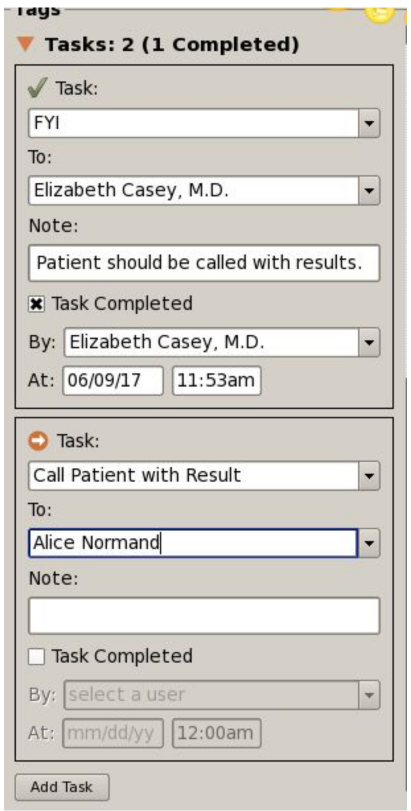
Viewing Document Task



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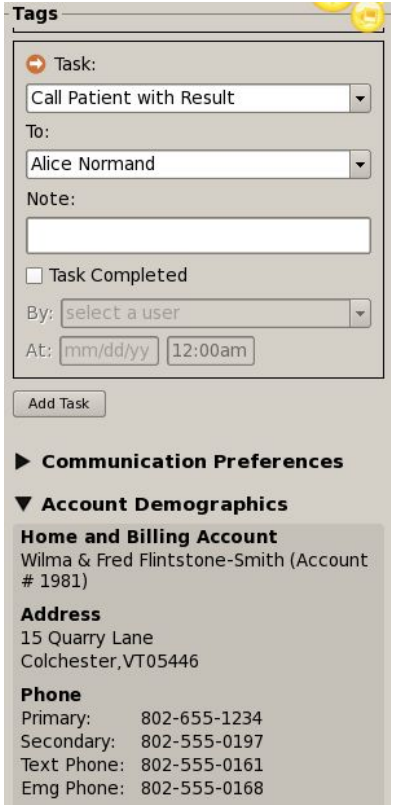
Patient Demographics Included



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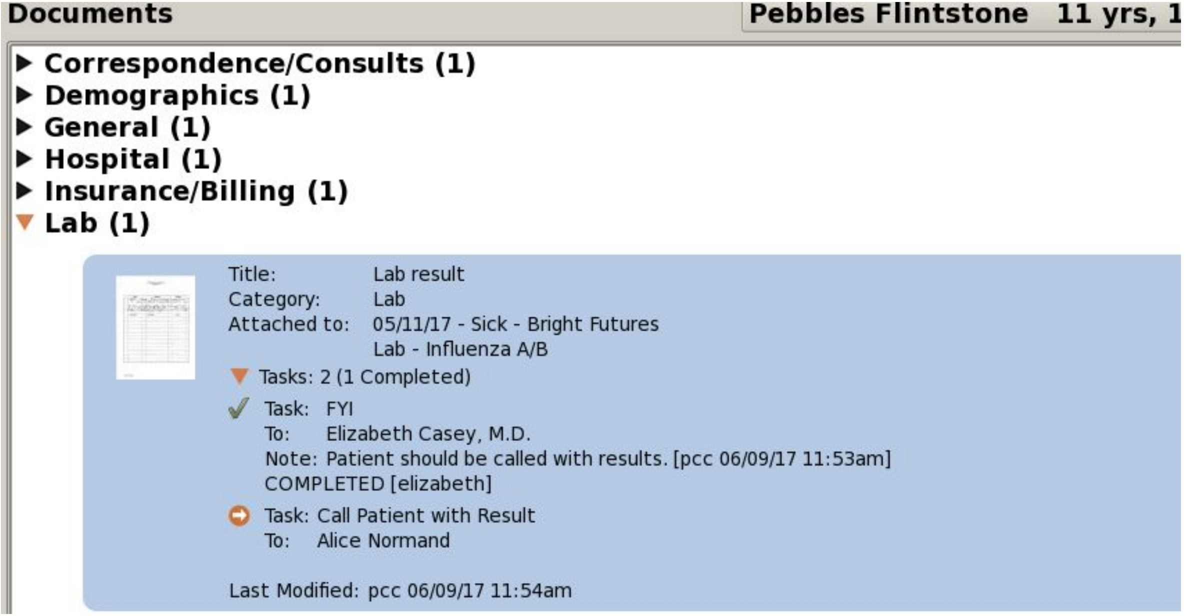
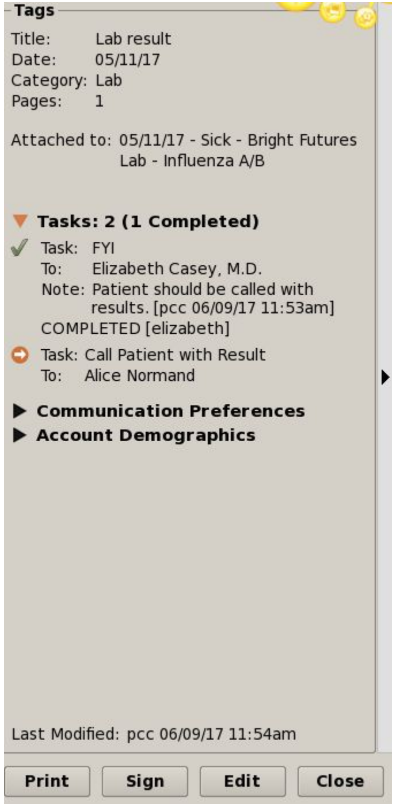
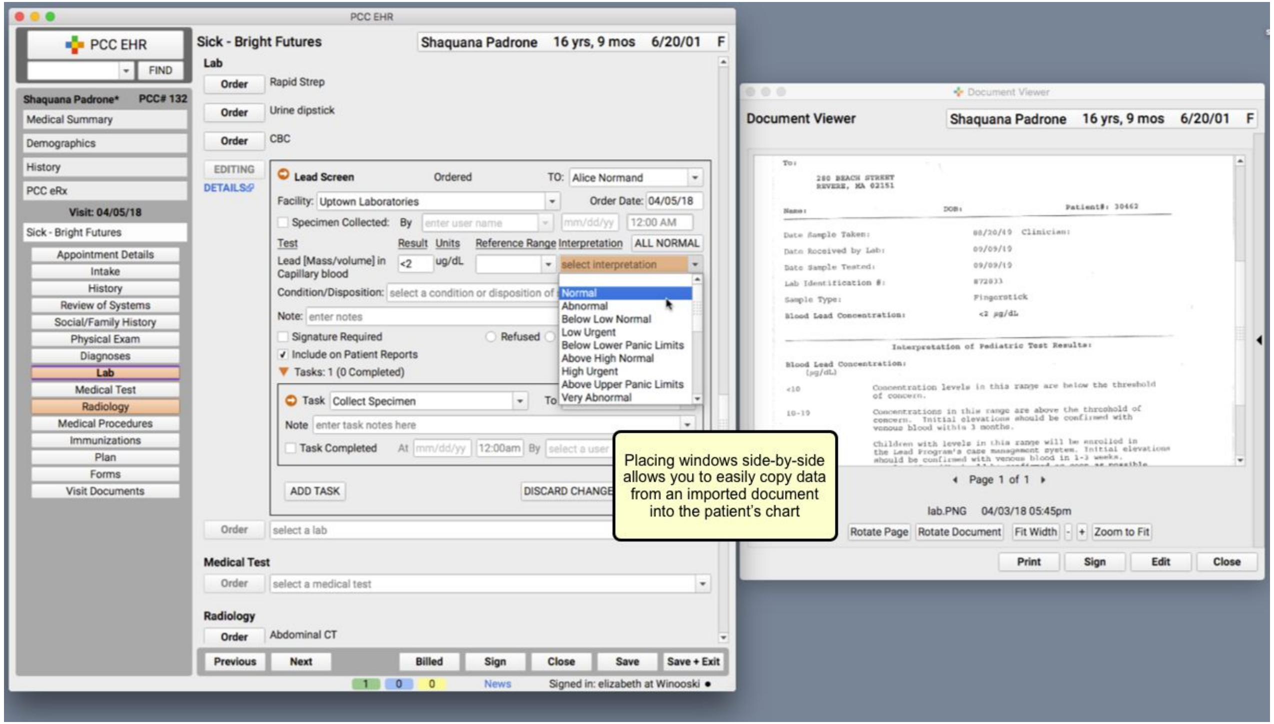
Task Visible in Documents Screen



Edit/Sign Document



Keep Documents Open as You Chart



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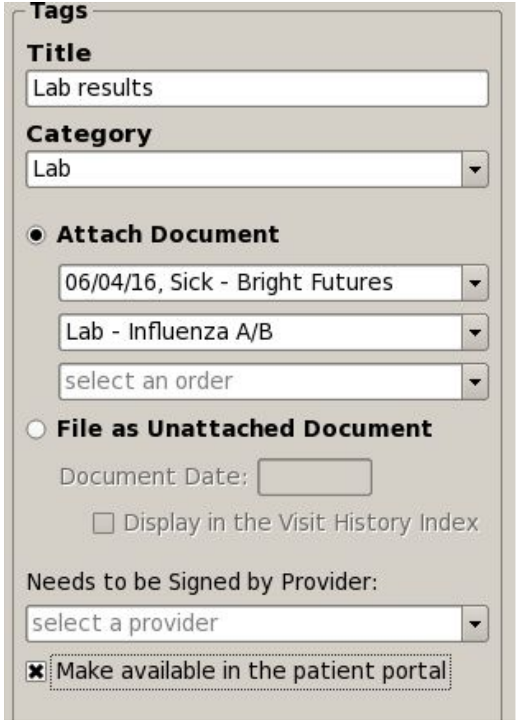
Show Documents in the Patient Portal

- 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



Communicating w/Patients & Families

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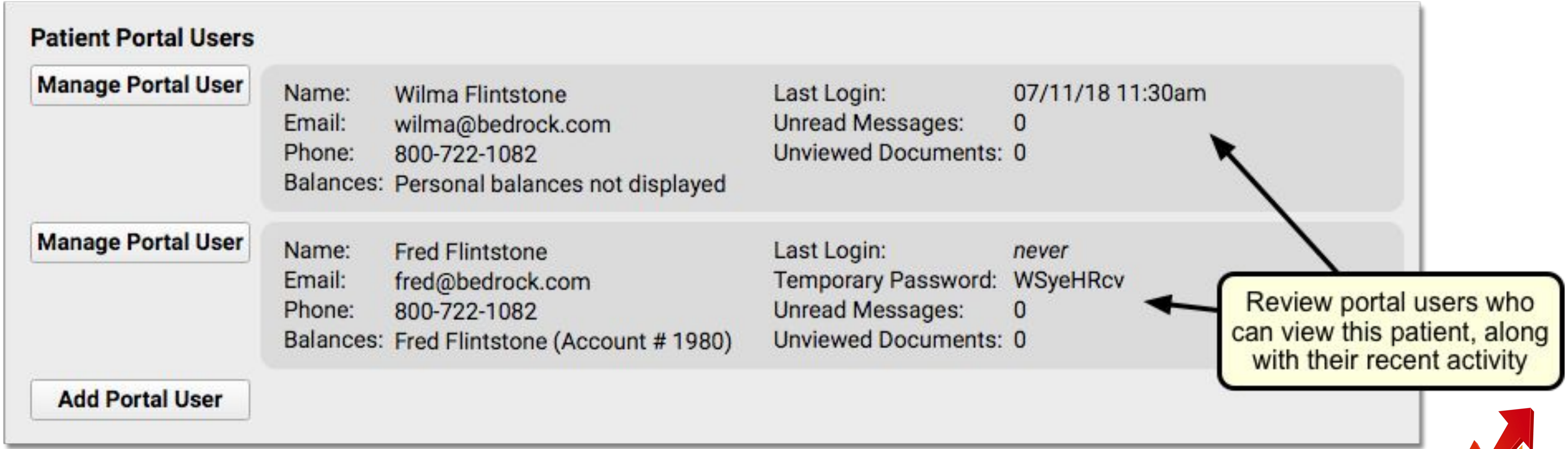
Portal Users Component

- 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 protal users and can confirm whether portal balances are enabled & privacy is enabled.

Portal Users Component



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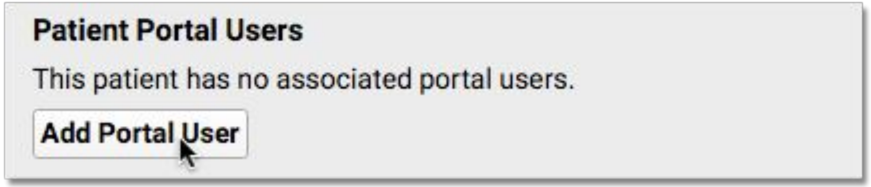
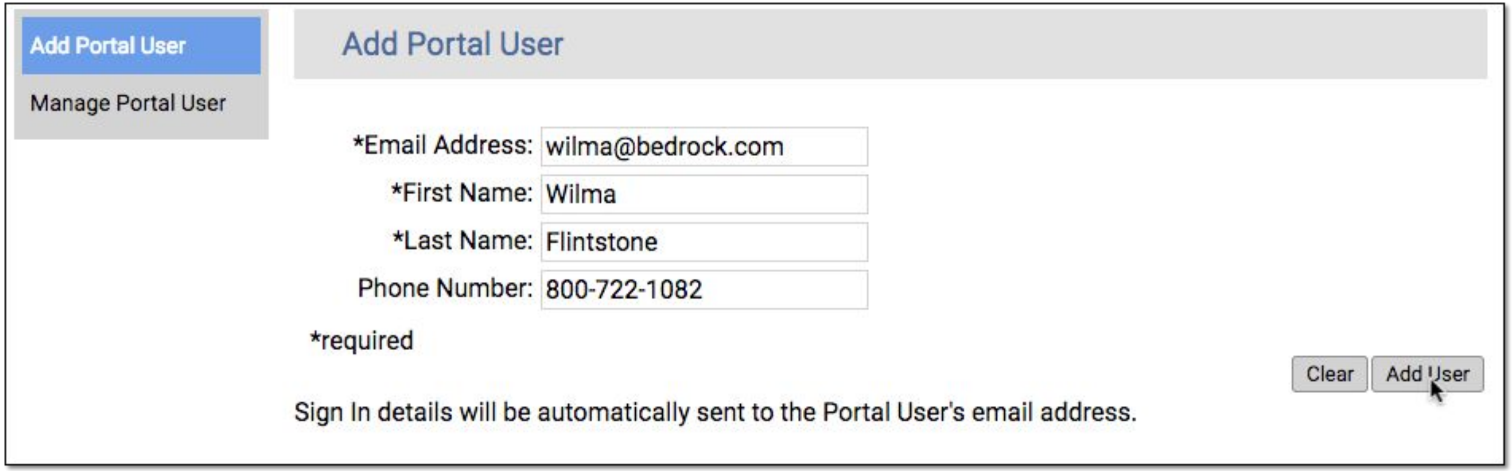
Portal Users Component





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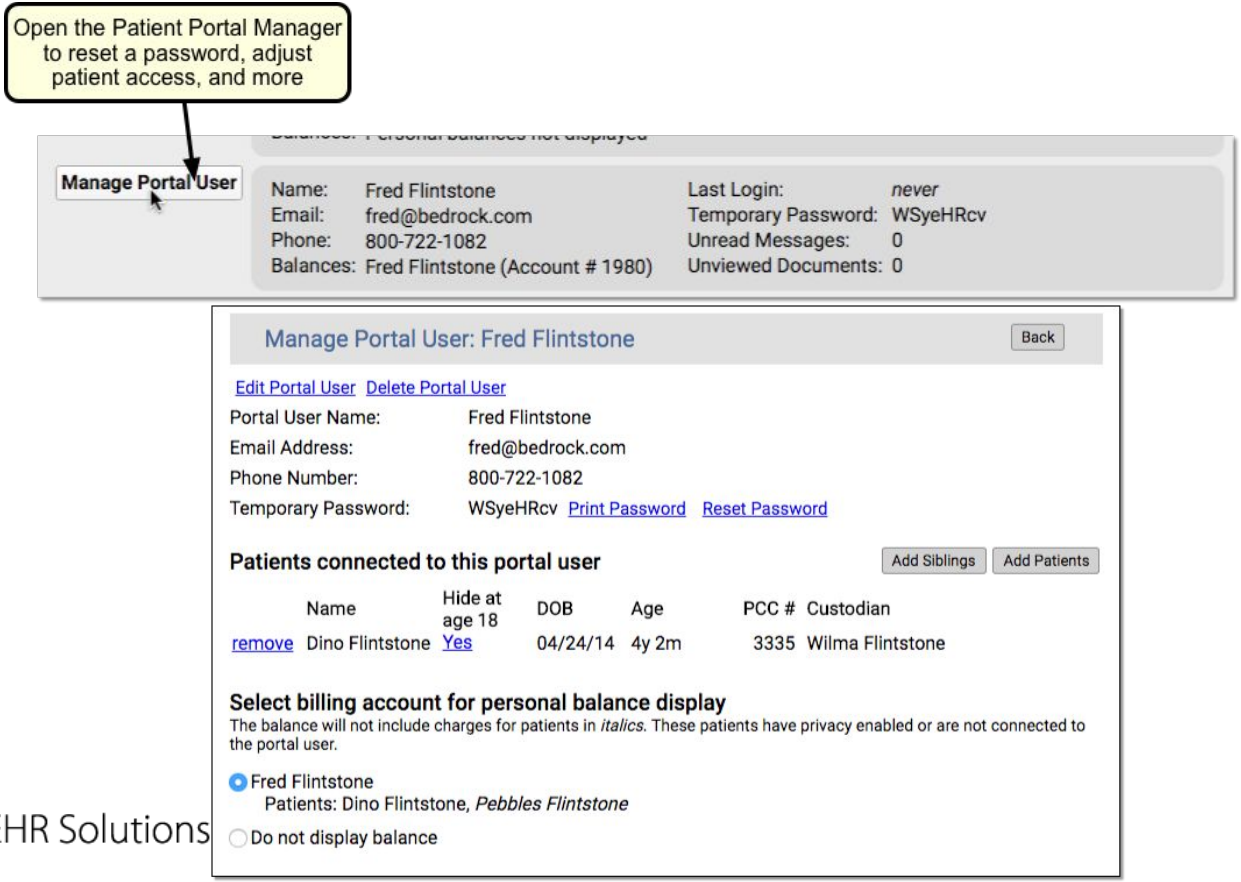
Portal Users Component



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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
Email: tmanning@kobolds.net
Phone:
Balances: Kevin M Manning (Account # 56)

Last Login: 07/19/18 11:36am
Unread Messages: 0
Unviewed Documents: 0

Manage Portal User

Name: Wilma Flintstone
Email: wilma@bedrock.com
Phone: 800-722-1082
Balances: Personal balances not displayed

Last Login: 07/11/18 11:30am
Unread Messages: 0
Unviewed Documents: 0

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

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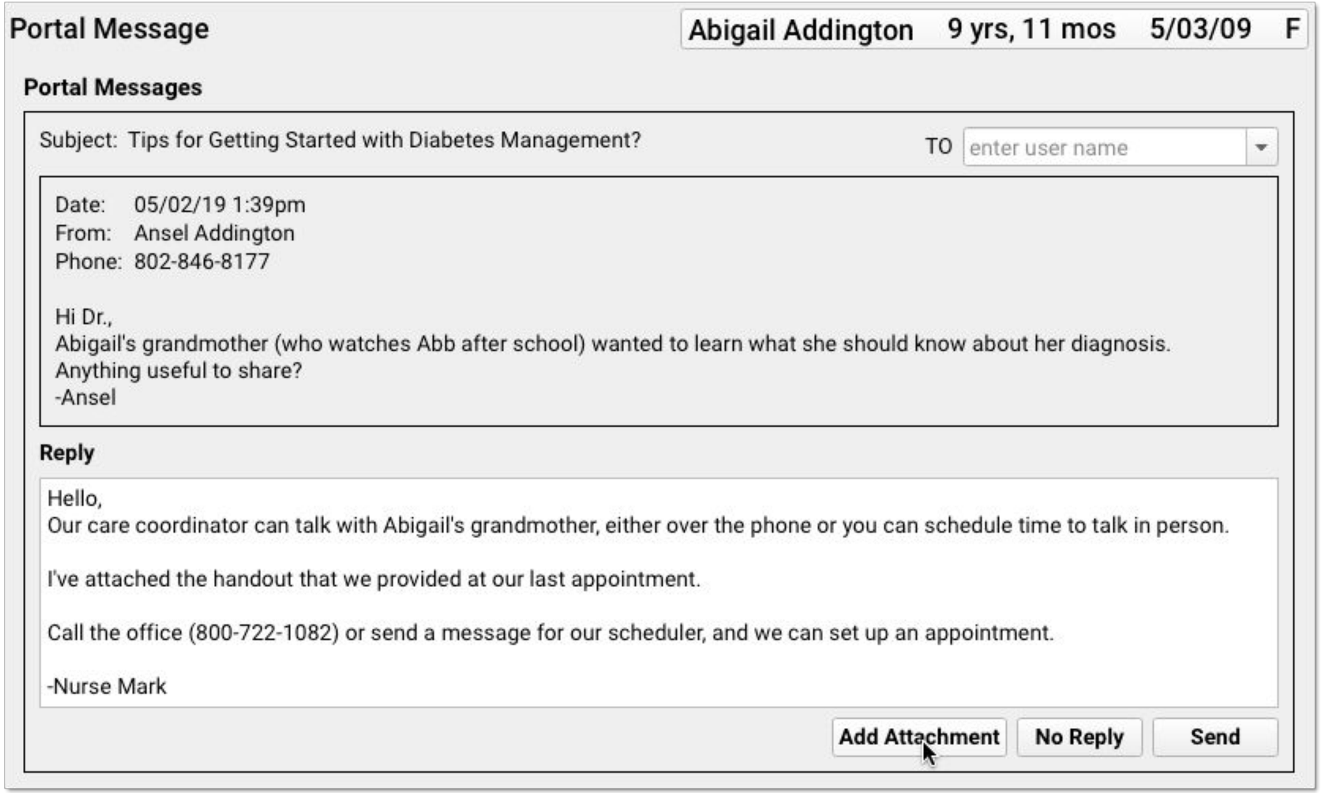
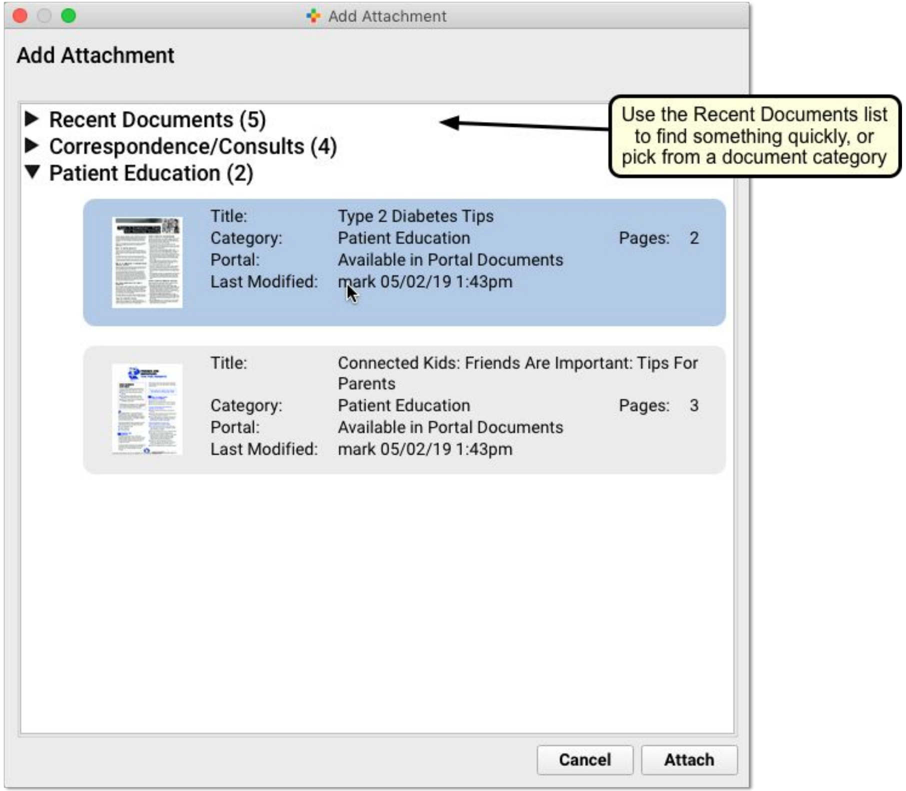
THRIVING THROUGH CHANGE

Attach Documents to Portal Messages



Attach Documents to Portal Messages



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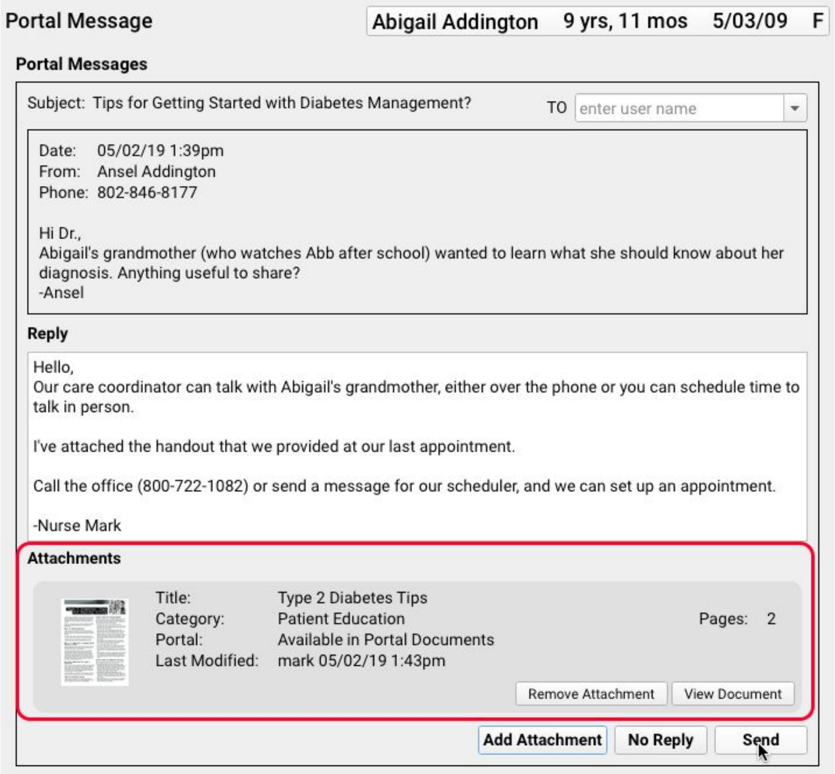
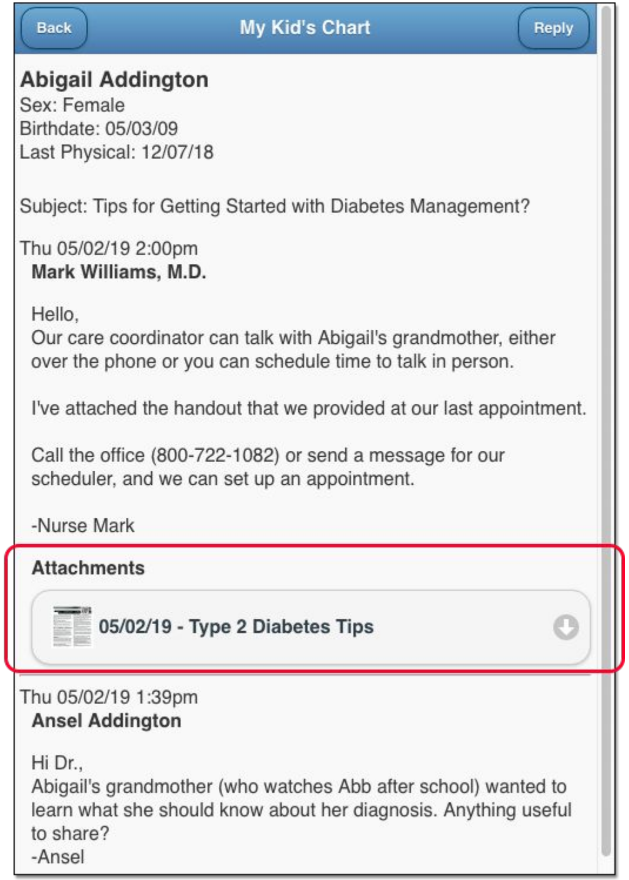
Attach Documents to Portal Messages



Attach Documents to Portal Messages



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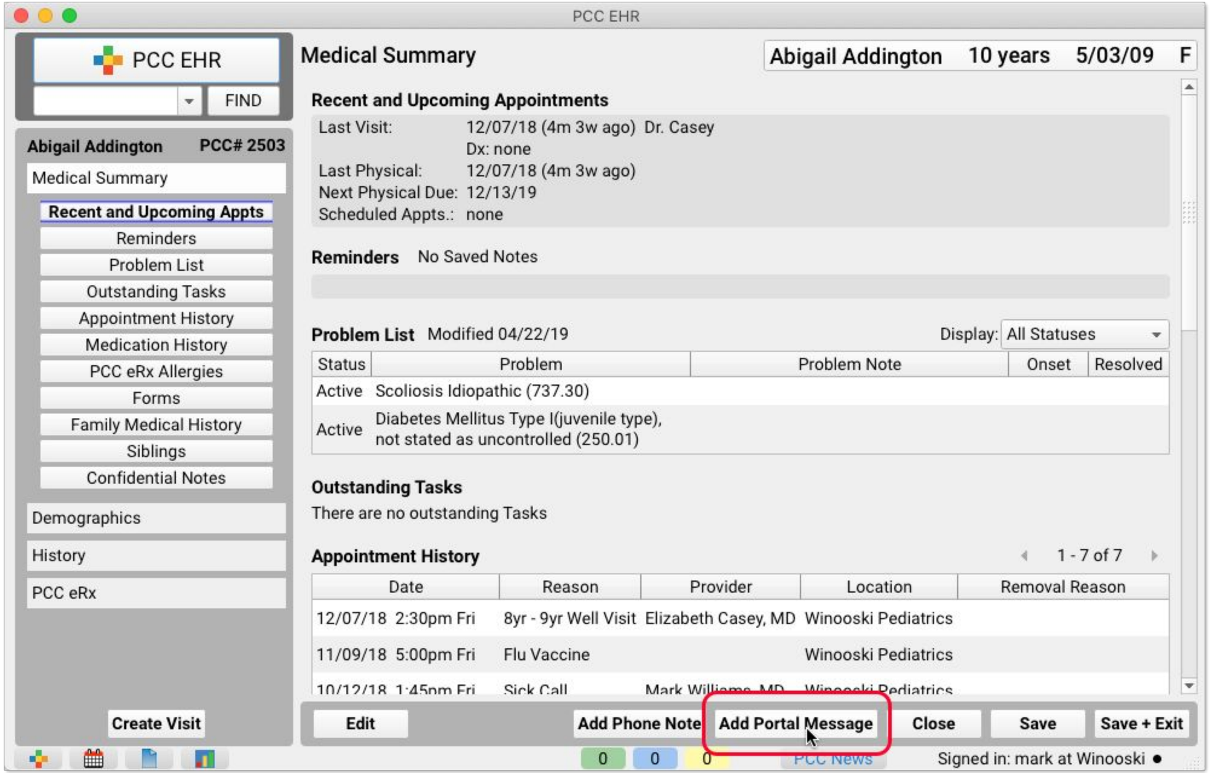
Add Portal Message Button



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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

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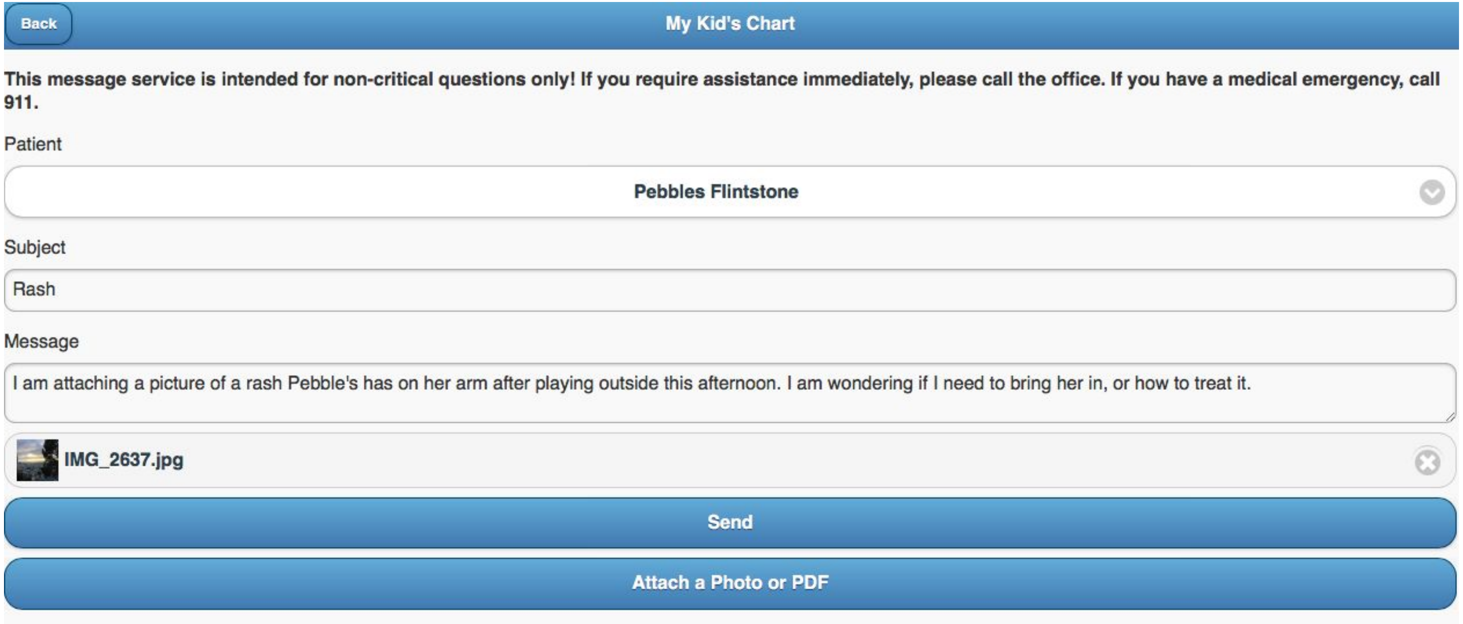
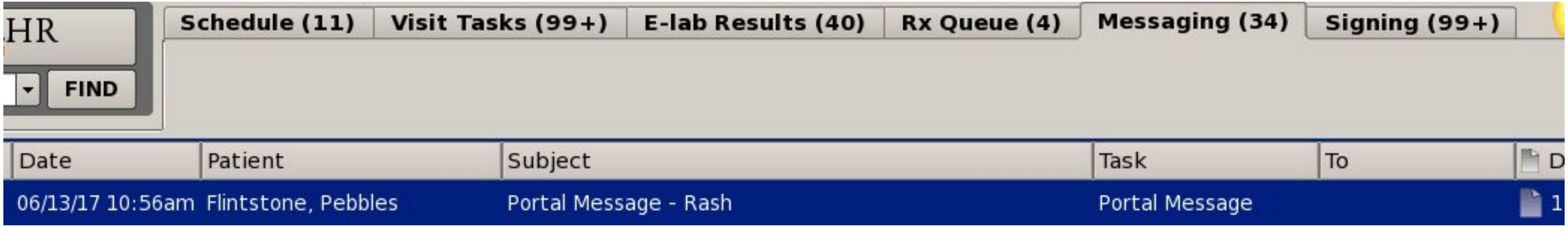
Parent/Patient Attaches Document



Document Visible in Messaging Queue



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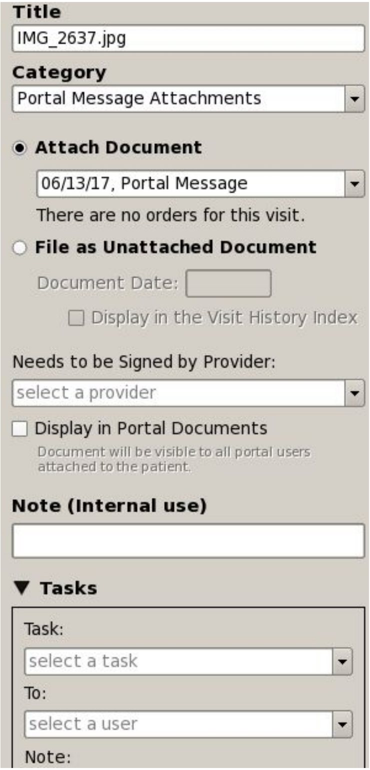
Edit Portal Message Document



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THRIVING THROUGH CHANGE

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.

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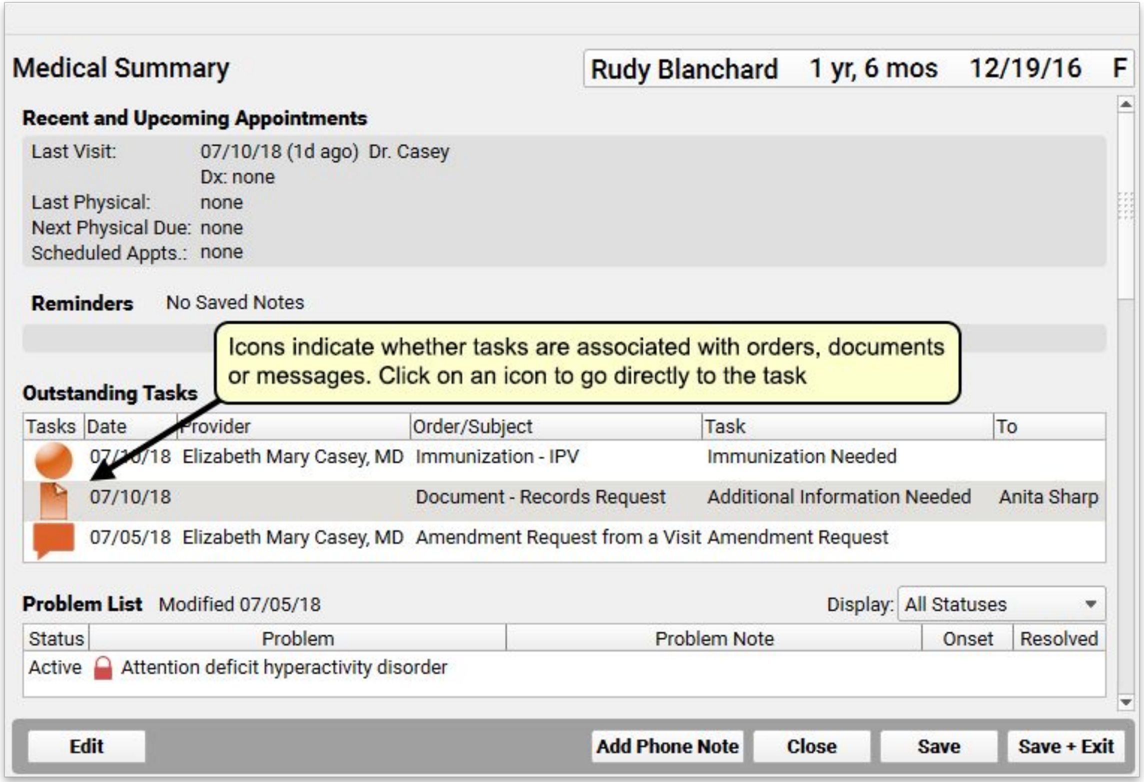
Outstanding Tasks Component



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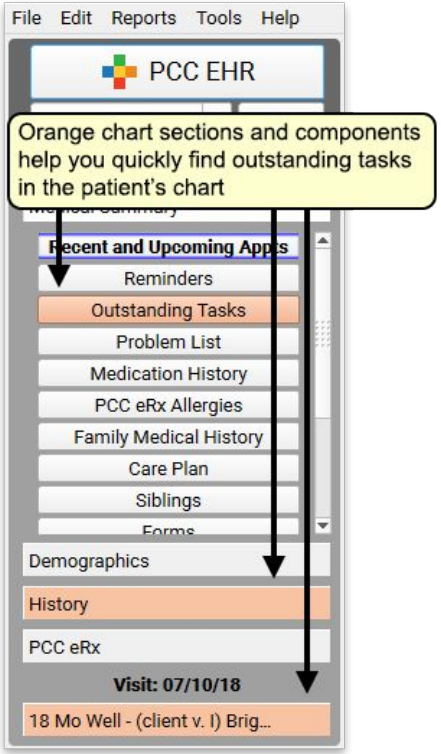
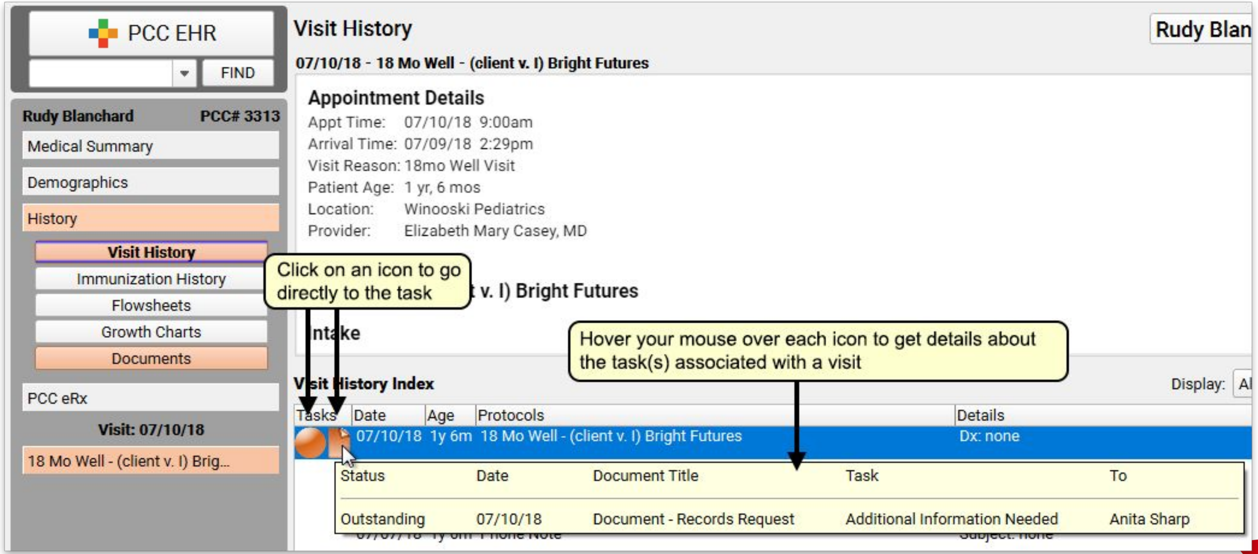
Outstanding Tasks Component





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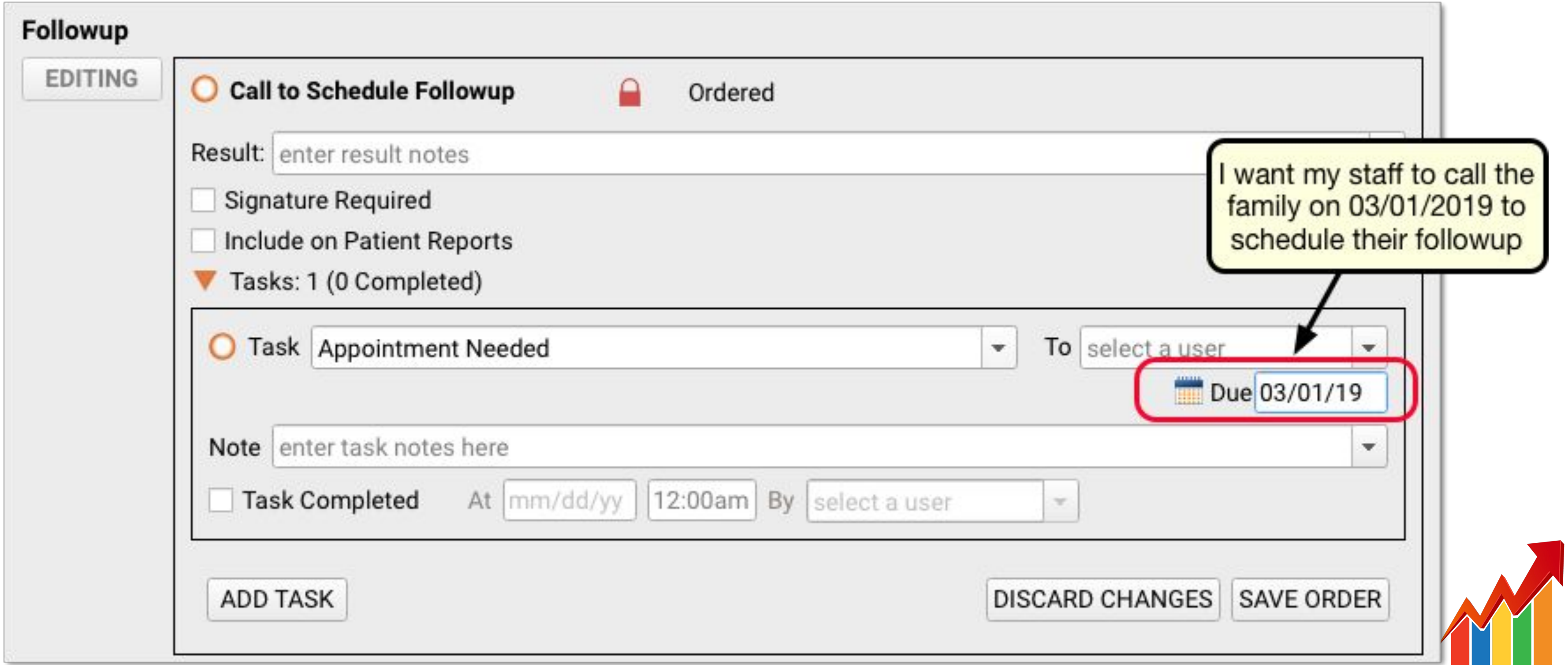
Due Dates for Tasks

- 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



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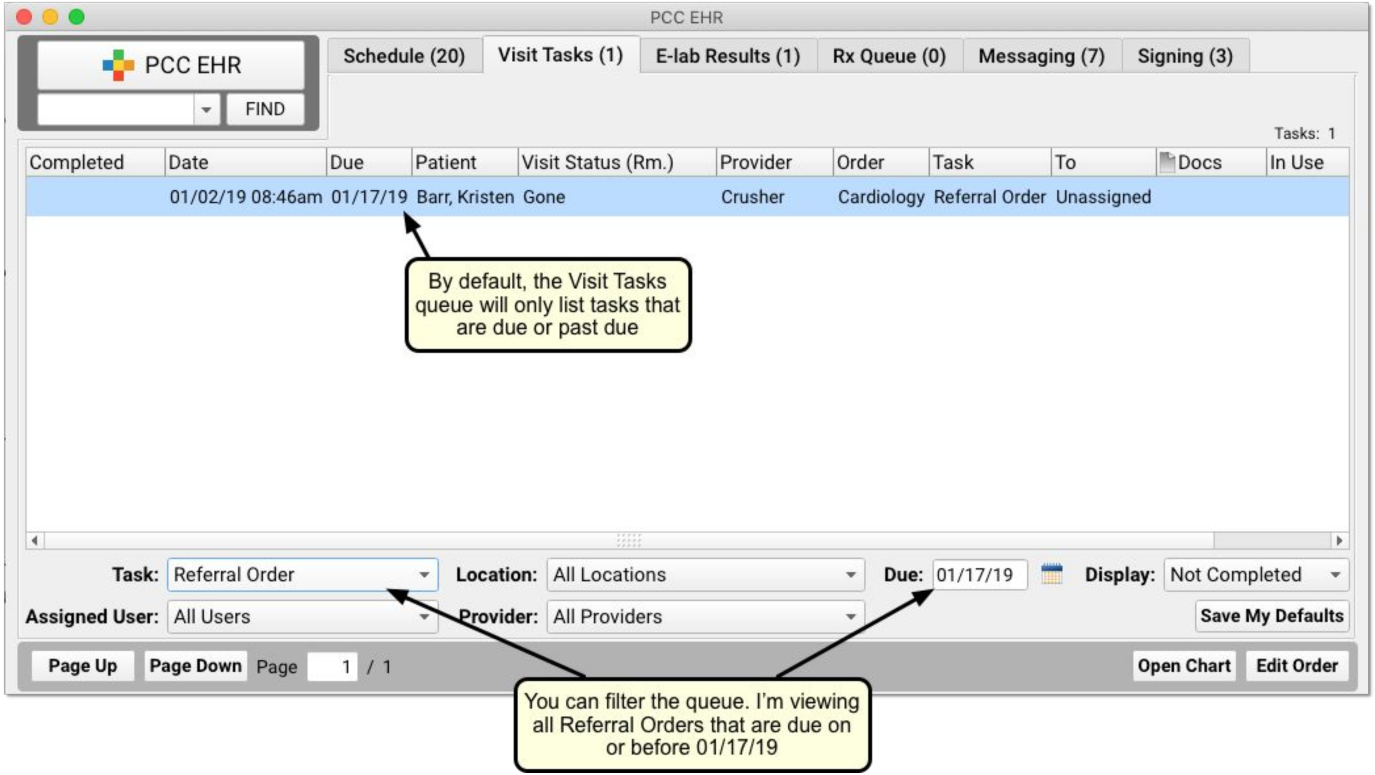
Due Dates for Tasks



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Due Dates for Tasks

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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

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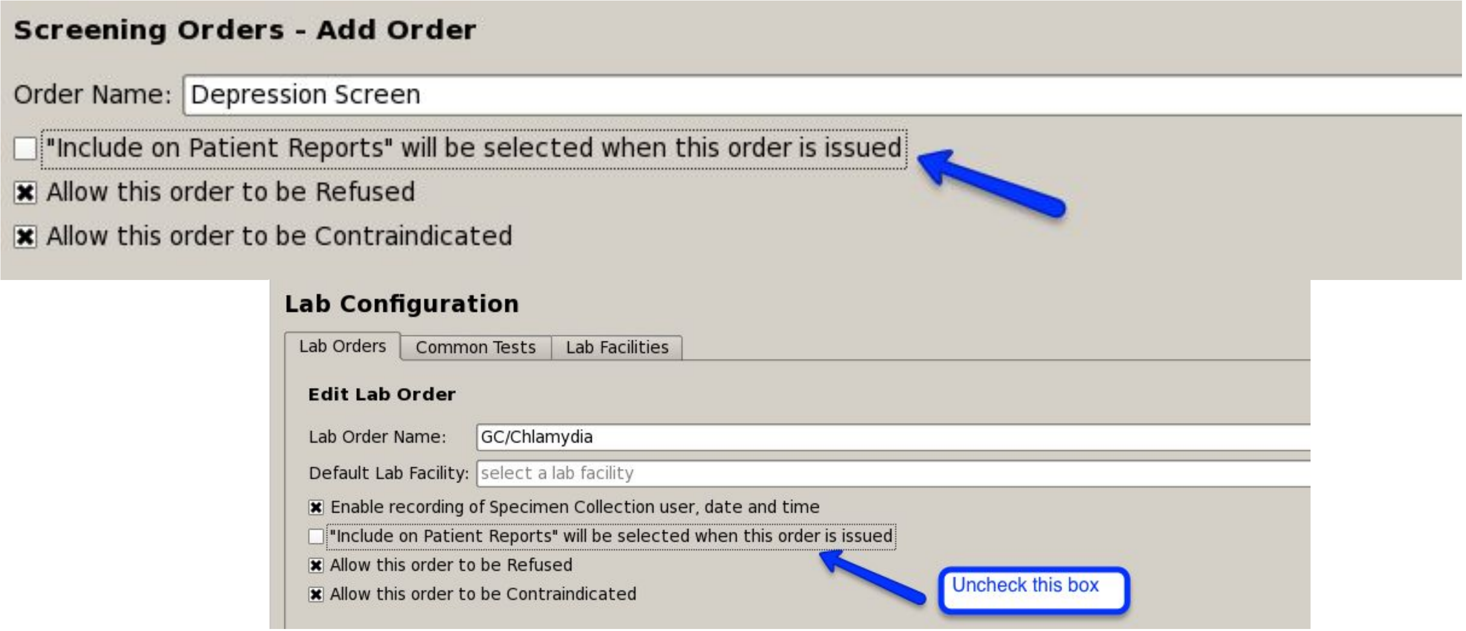
Hiding Orders from Patient Reports



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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

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THRIVING THROUGH CHANGE

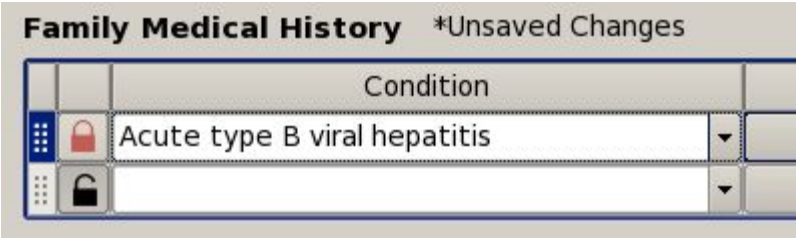
Hide Problem List Diagnoses

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



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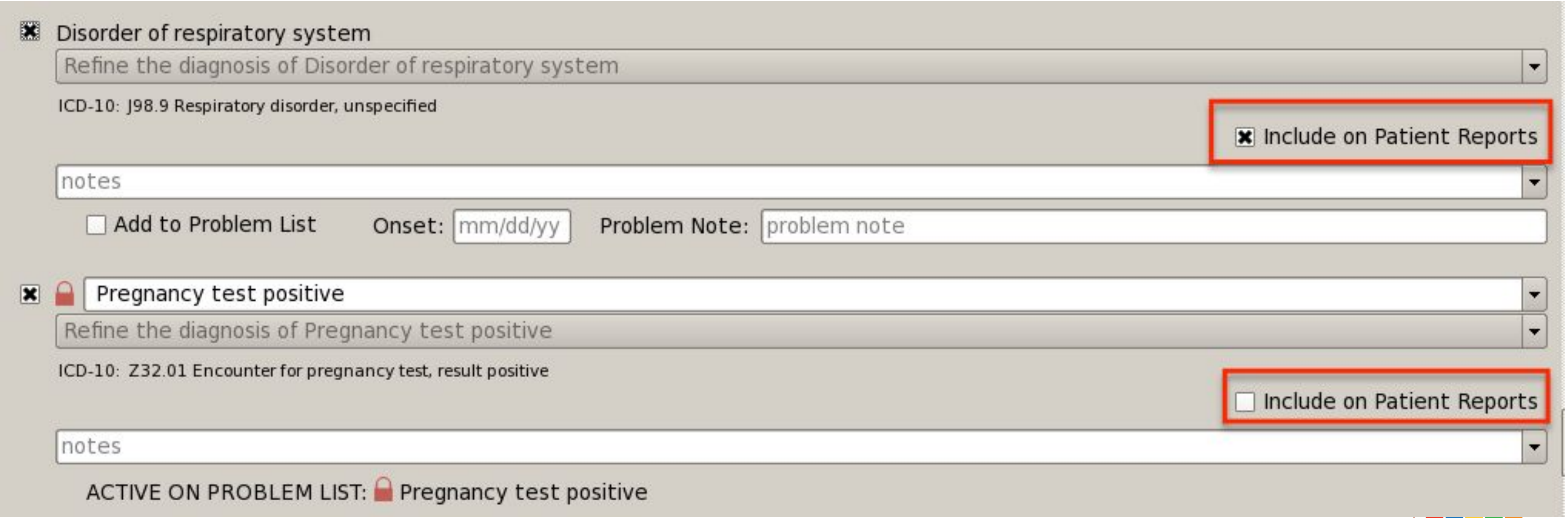
Hide Visit Diagnoses



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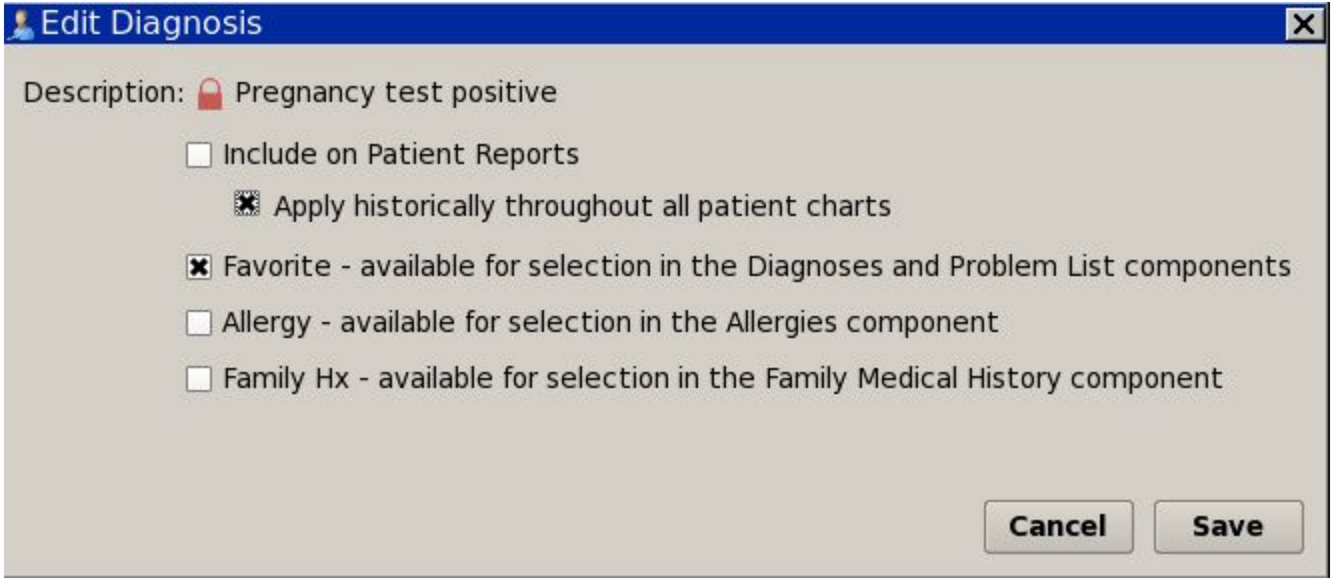
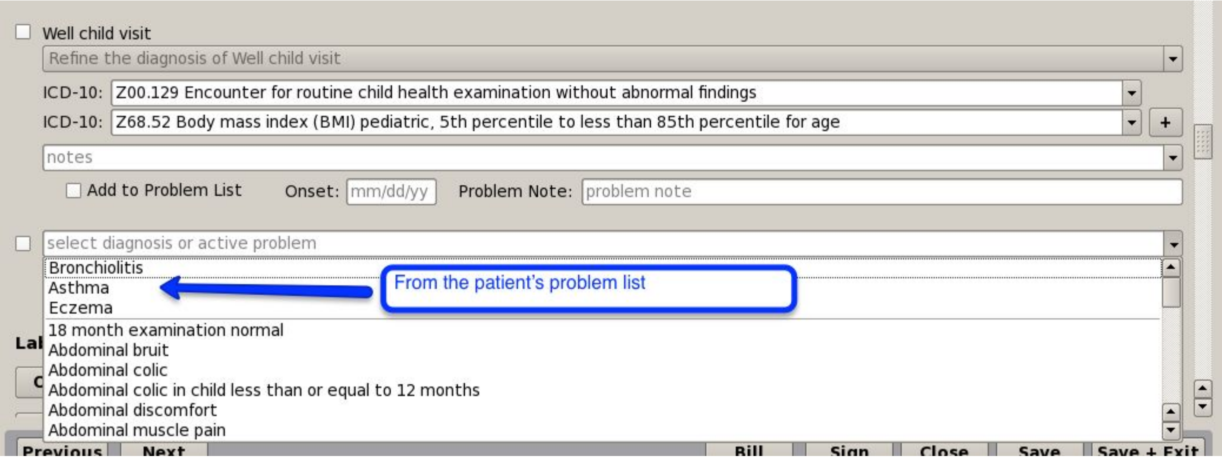
Diagnosis Configuration



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



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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.

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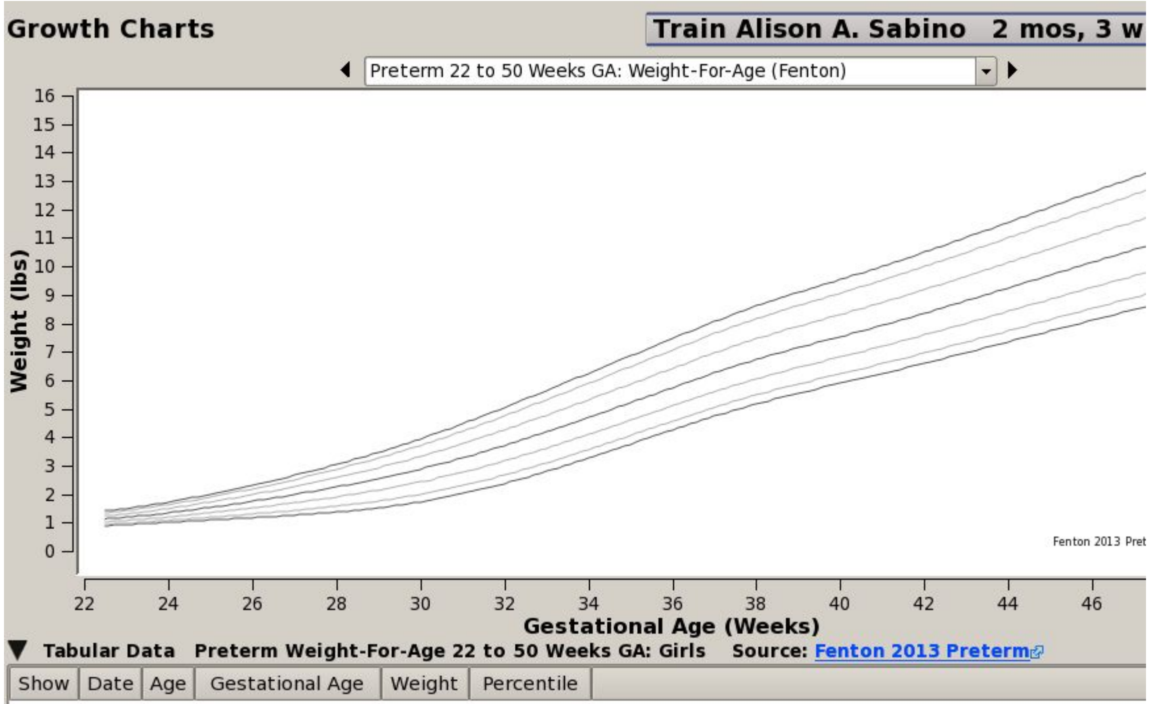
Fenton Preterm Growth Charts



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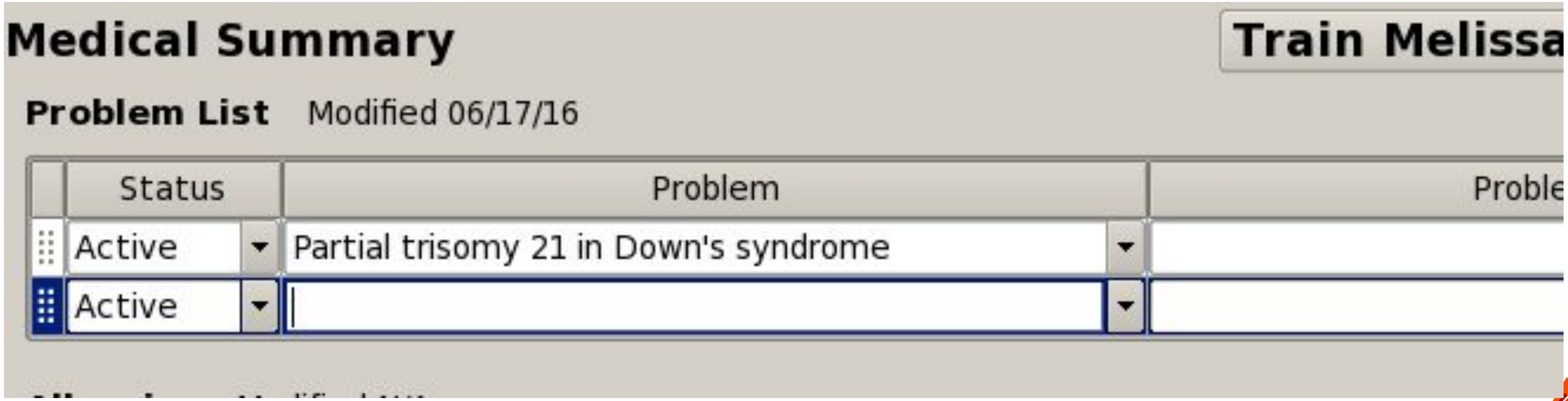
Down Syndrome Growth Chart

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



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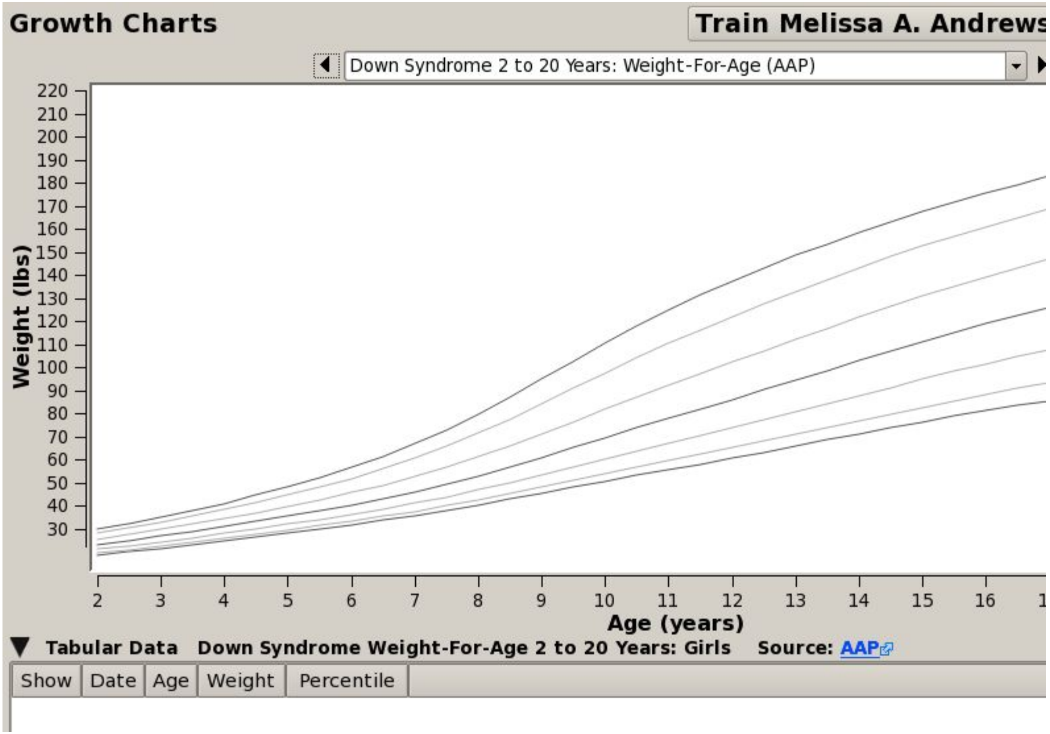
Down Syndrome Growth Chart



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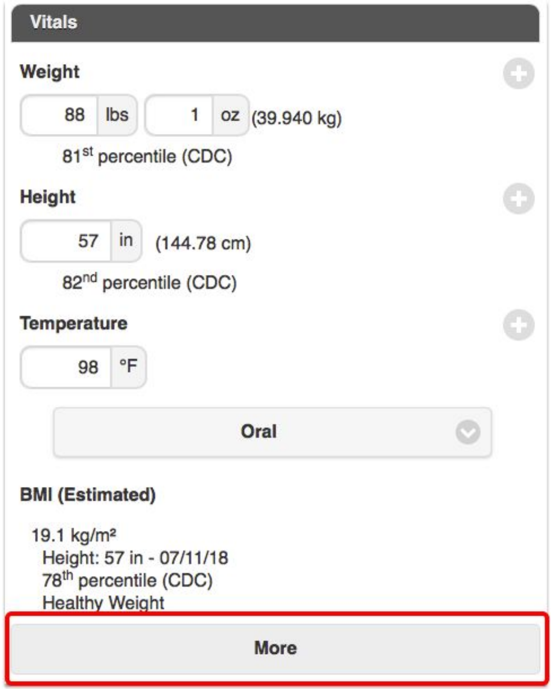
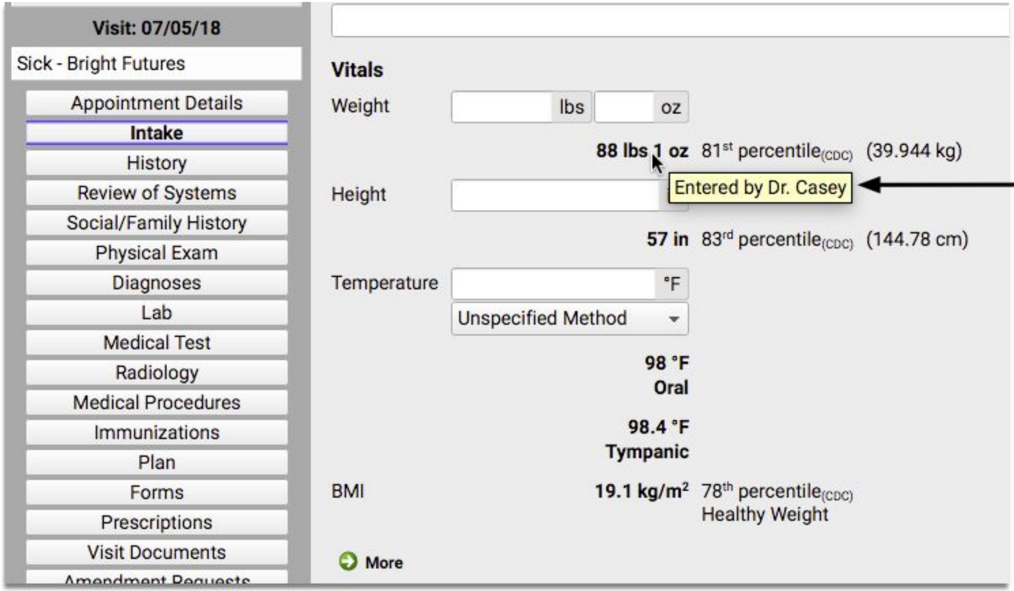
Using PocketPCC for Charting

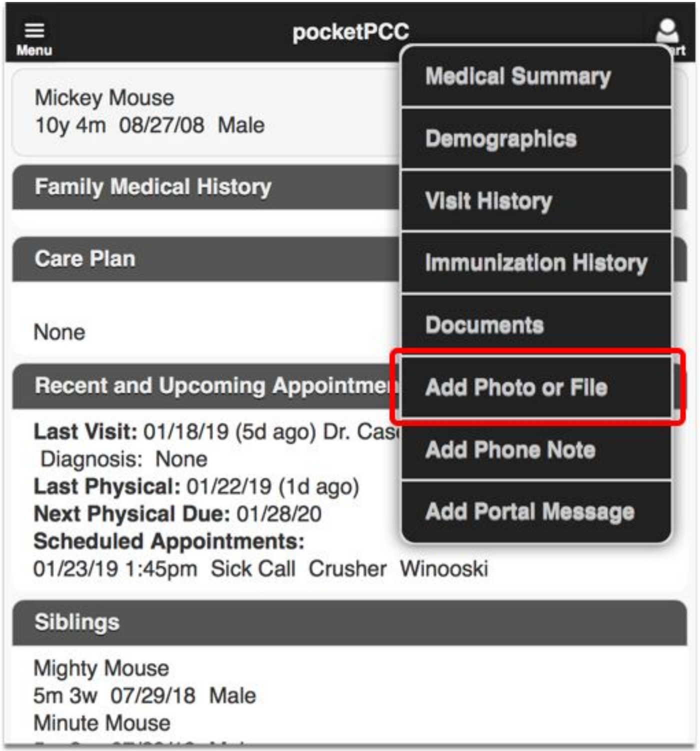
Enter Vitals in Pocket PCC





Hover over vitals to see who entered them

Attach Photos to Charts via Pocket PCC



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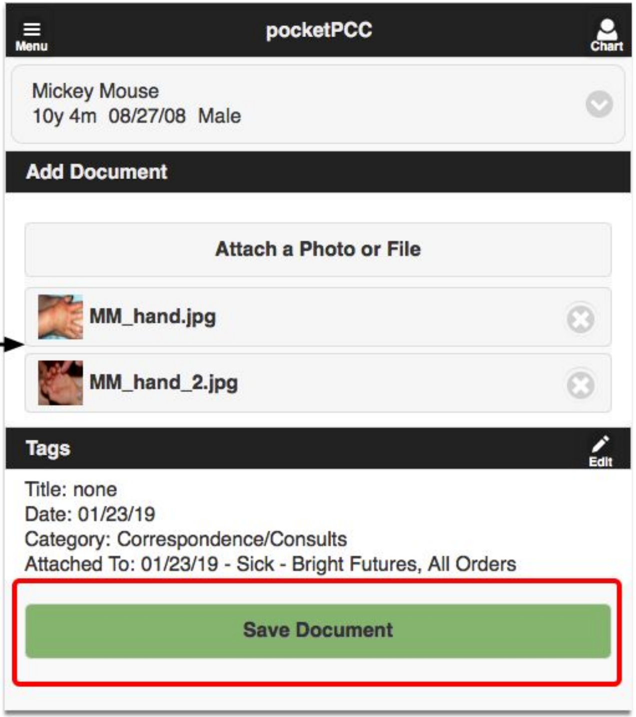
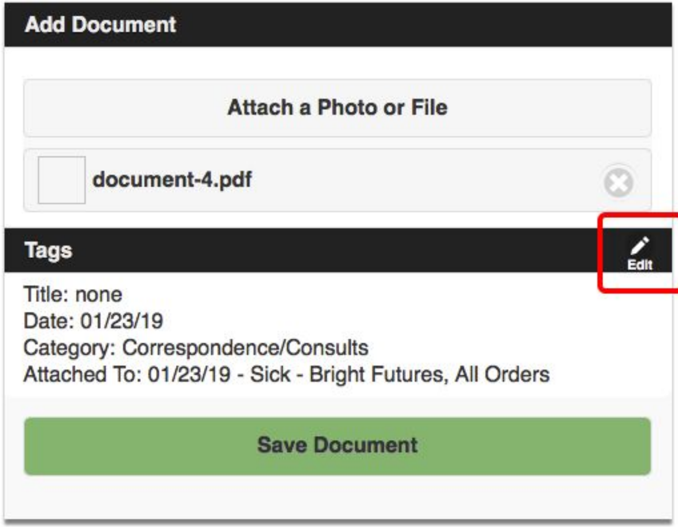
Attach Photos to Charts via Pocket PCC

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





Edit tags before saving

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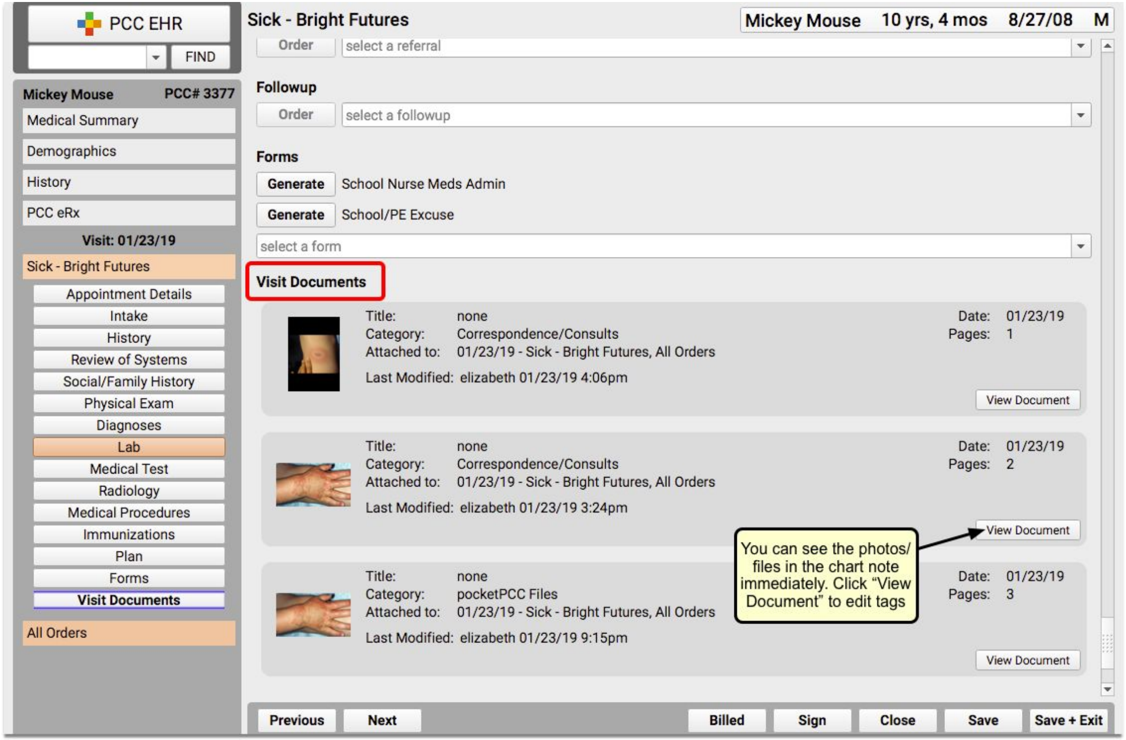
Attach Photos to Charts via Pocket PCC



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THRIVING THROUGH CHANGE

Sending Records Electronically

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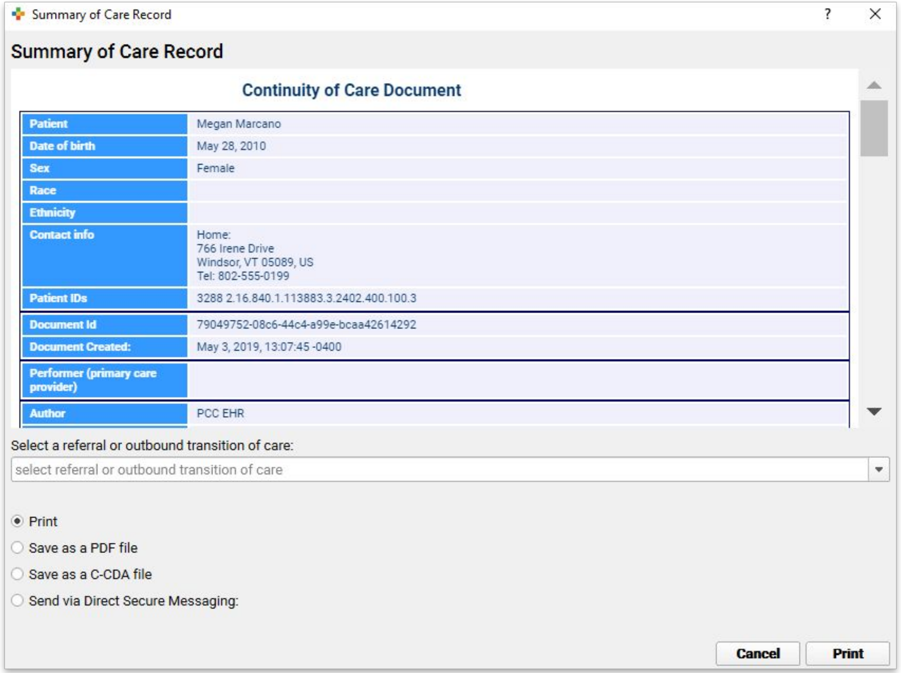
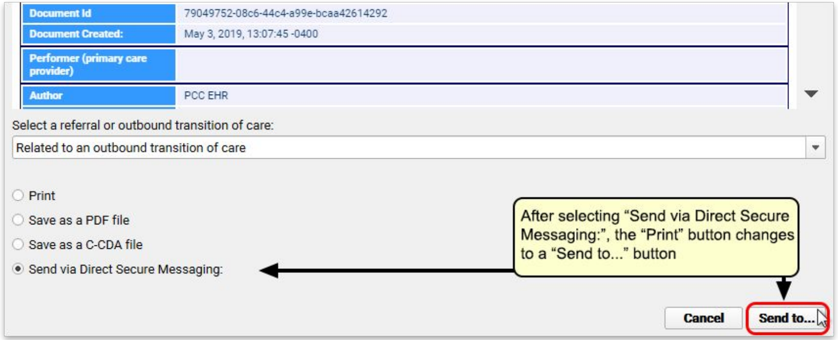
THRIVING THROUGH CHANGE

Attach Document to Direct Secure Msg





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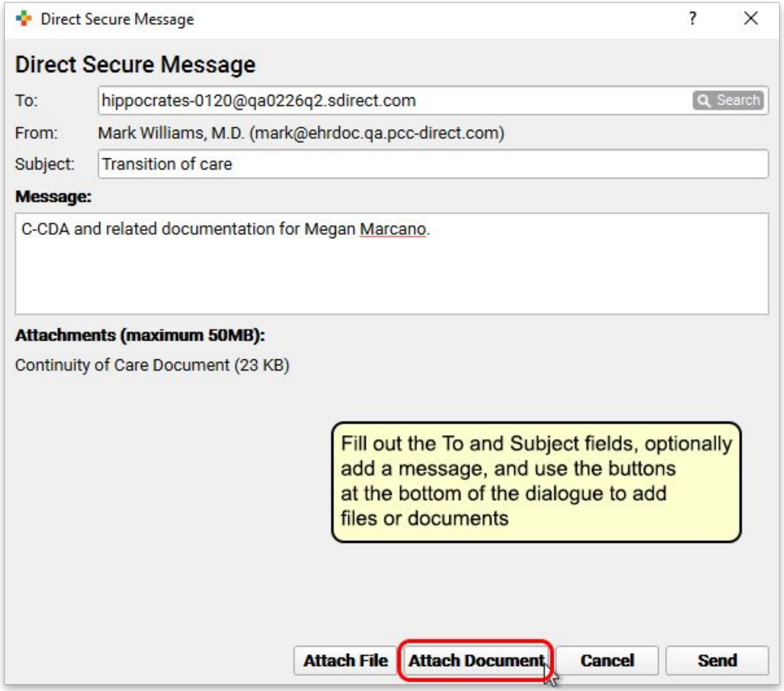
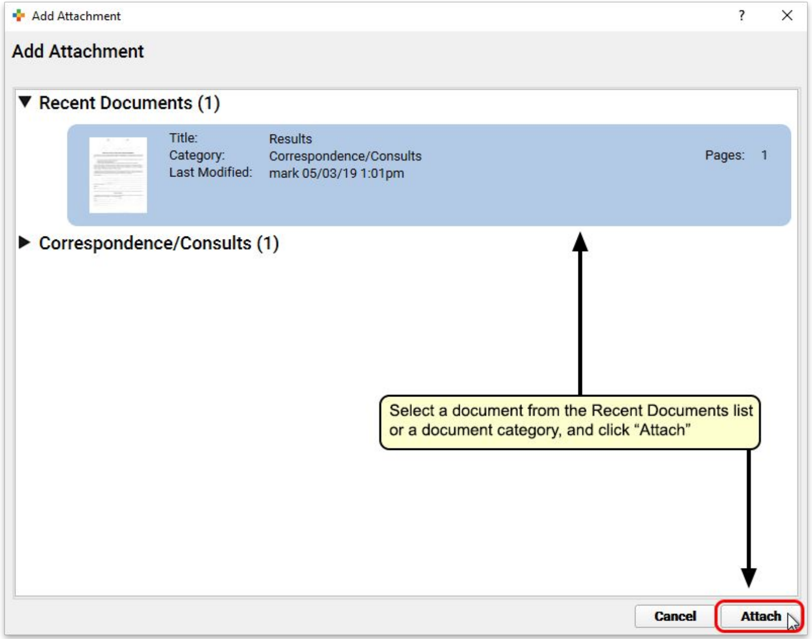
THRIVING THROUGH CHANGE

Attach Document to Direct Secure Msg





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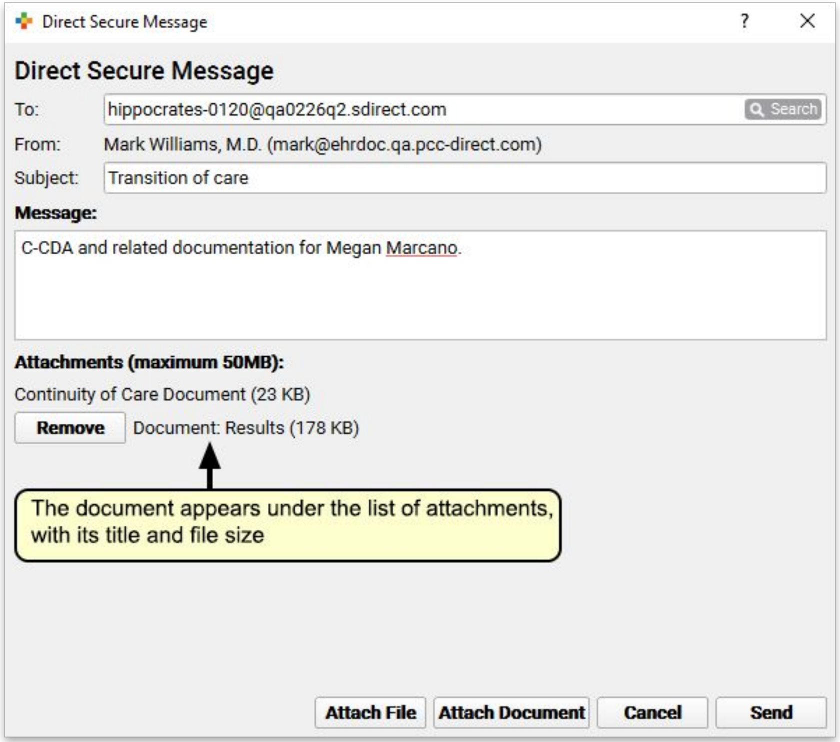
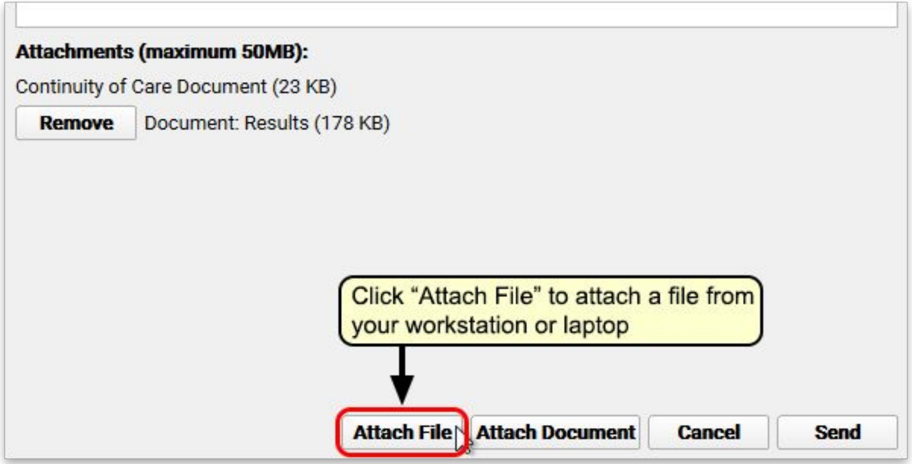
THRIVING THROUGH CHANGE

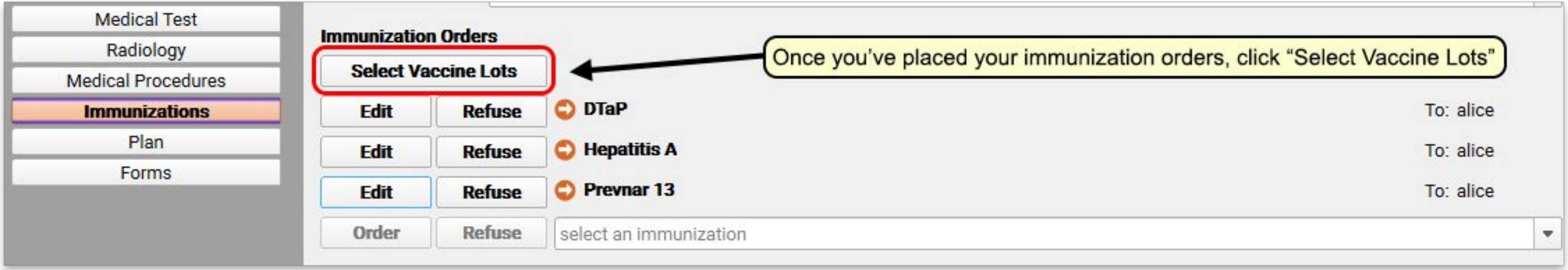
Attach Document to Direct Secure Msg





Immunizations & Inventory

Track Imms Admin with Barcodes



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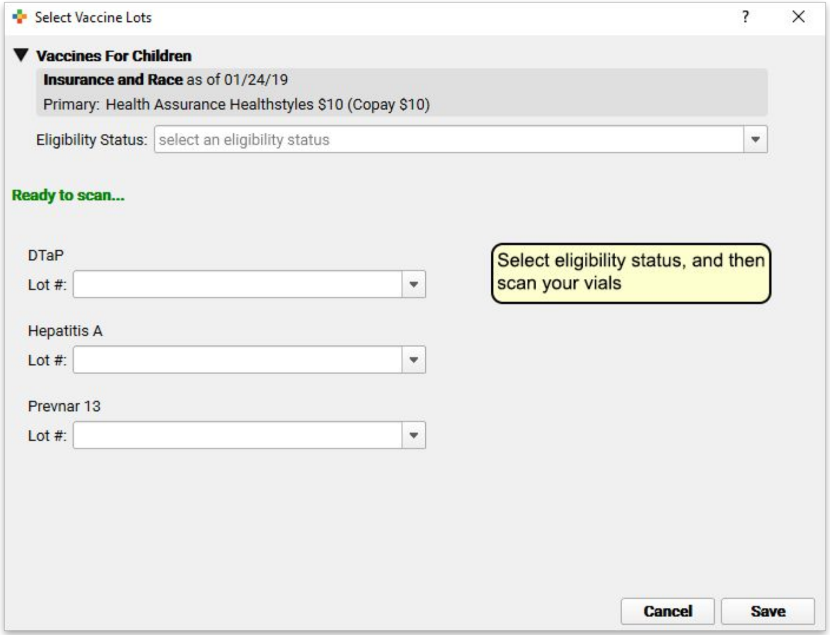
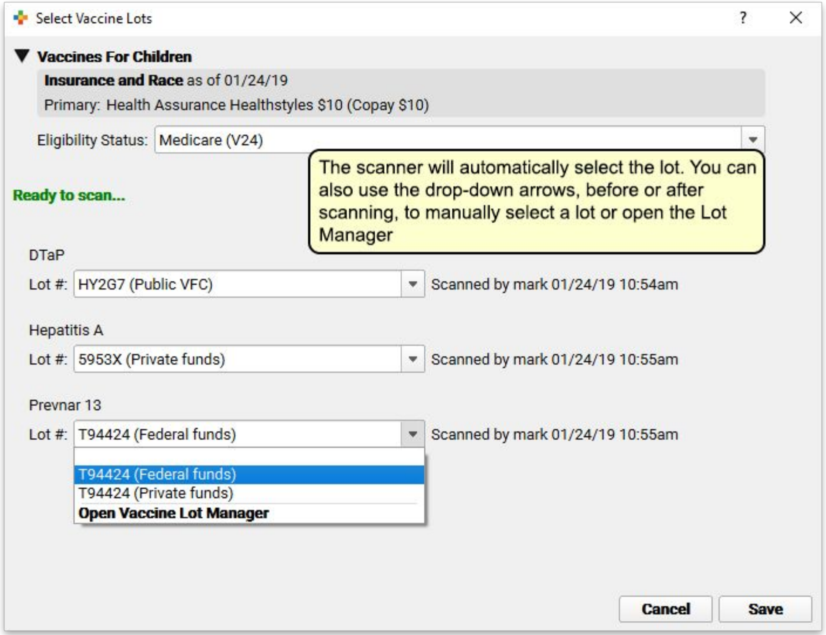
Track Imms Admin with Barcodes





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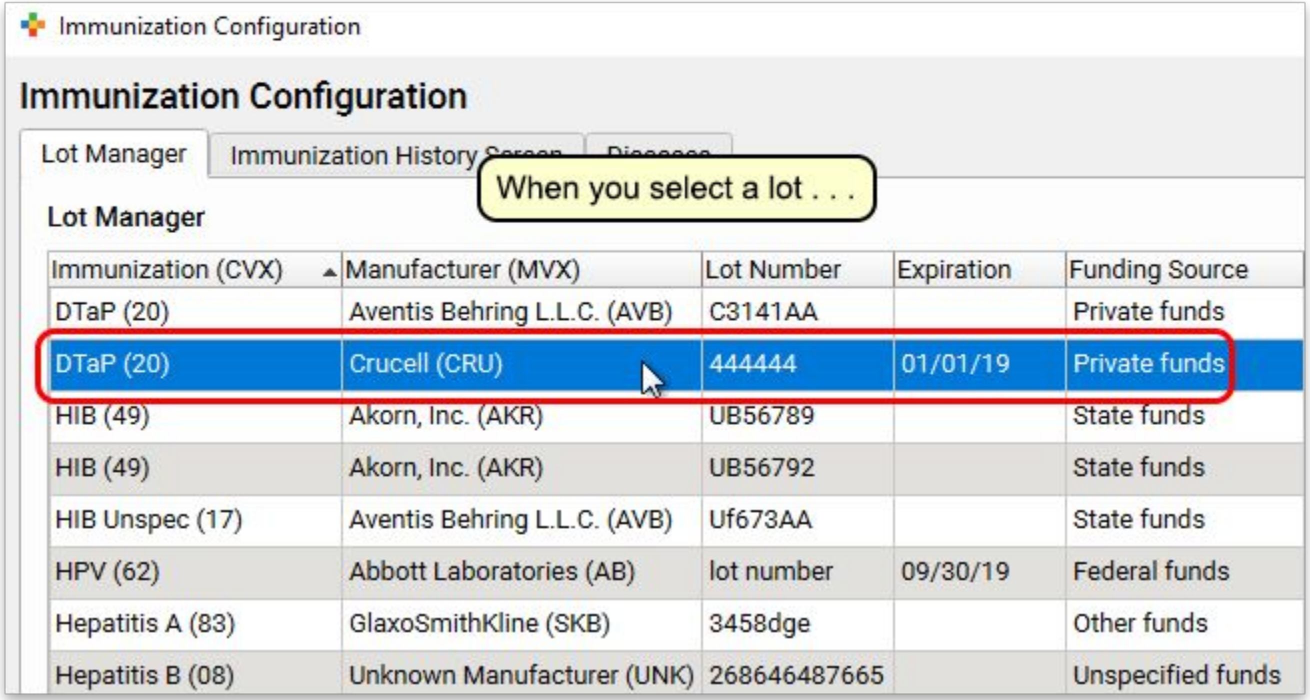
THRIVING THROUGH CHANGE

View Imms Admin in the Lot Manager



Immunization Configuration

Immunization Configuration

Lot Manager | Immunization History Screen | Diagnoses

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

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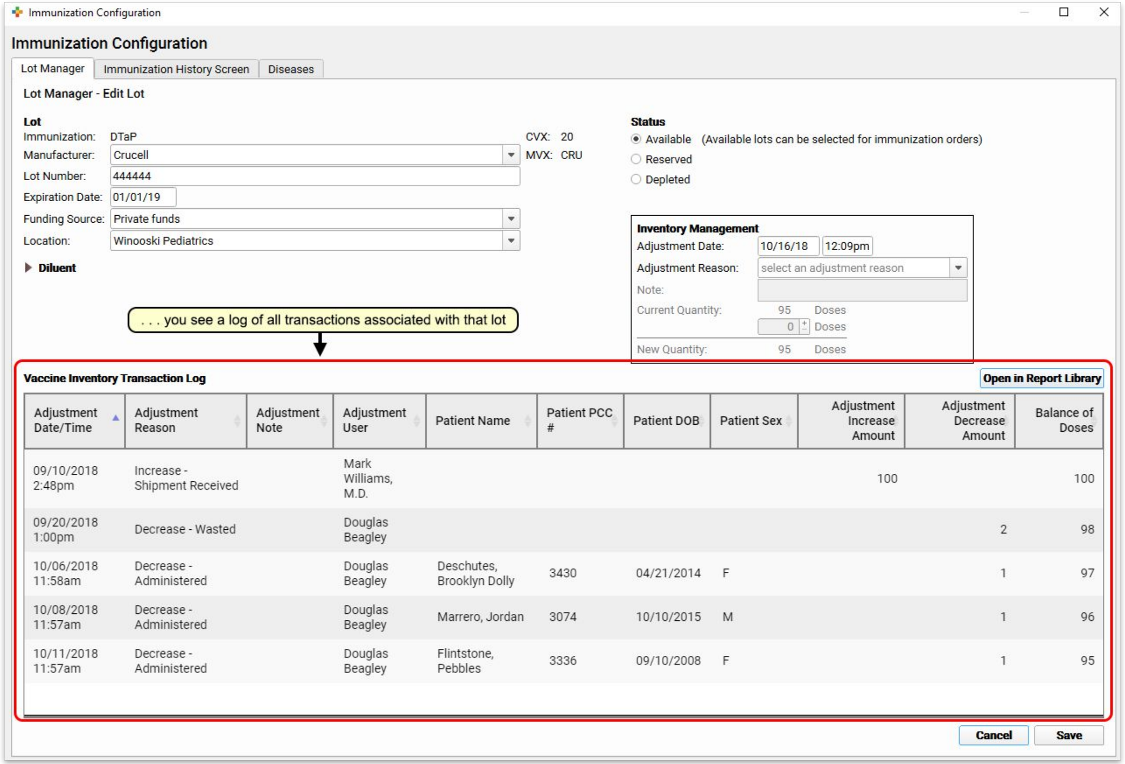
THRIVING THROUGH CHANGE

View Imms Admin in the Lot Manager



Immunization Configuration

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

Diluent

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
0 Doses
New Quantity: 95 Doses

. . . 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

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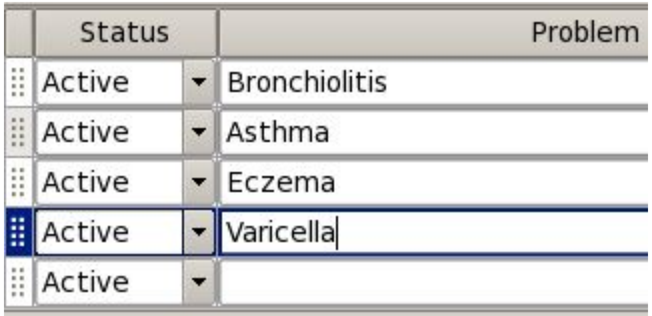
THRIVING THROUGH CHANGE

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



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	*date unknown*

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EHR Navigation

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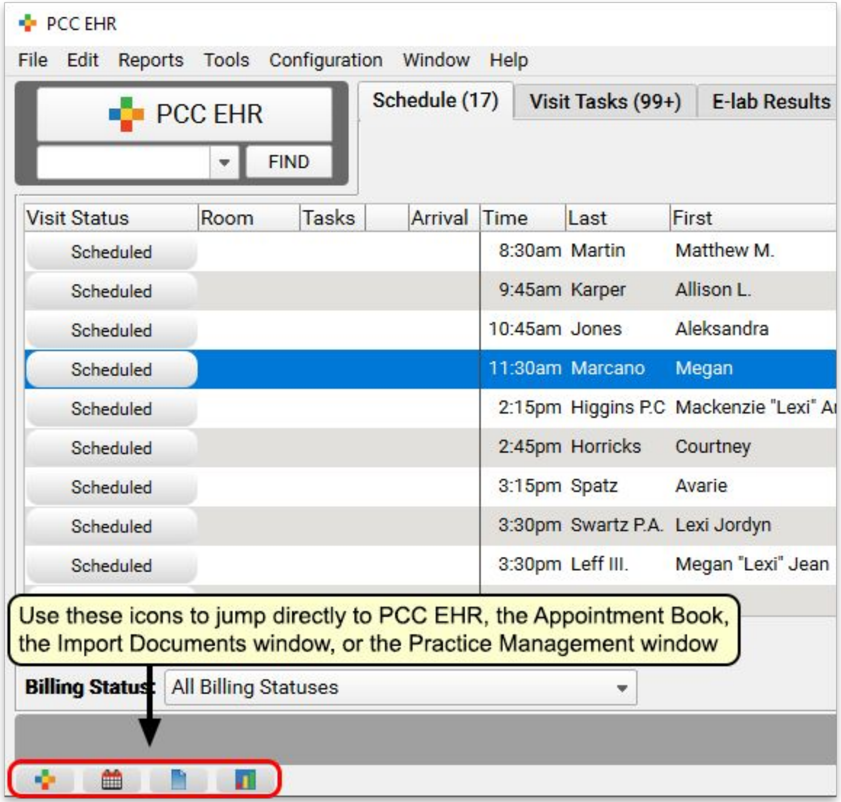
THRIVING THROUGH CHANGE

Open Multiple Windows in PCC EHR



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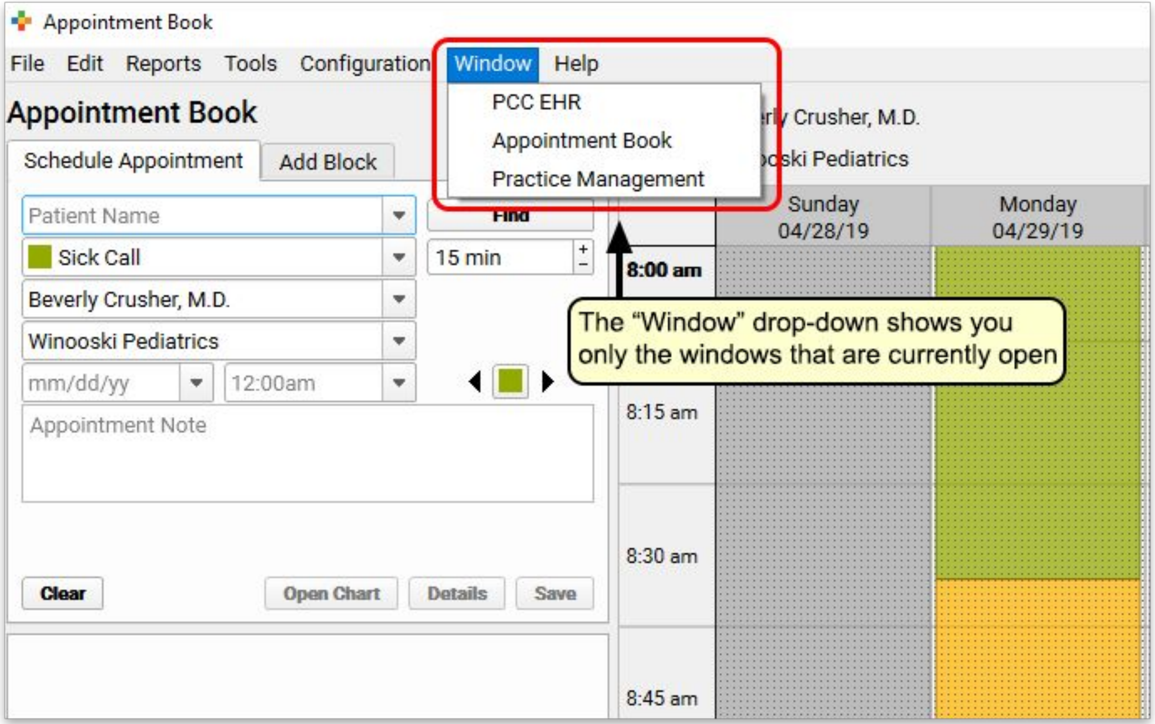
THRIVING THROUGH CHANGE

Open Multiple Windows in PCC EHR



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

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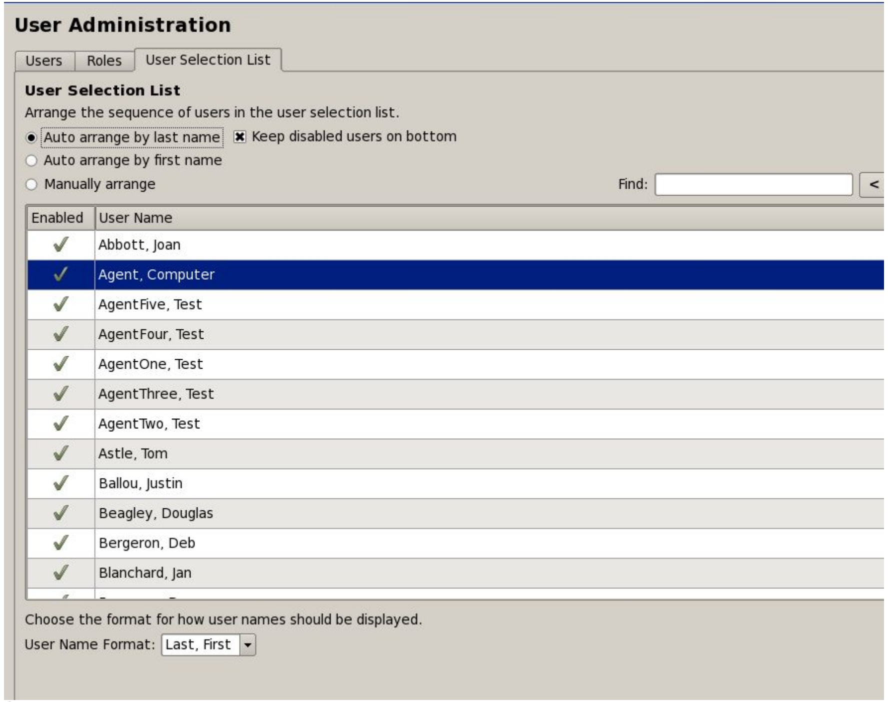
THRIVING THROUGH CHANGE

Organize Assigned User Drop Down List



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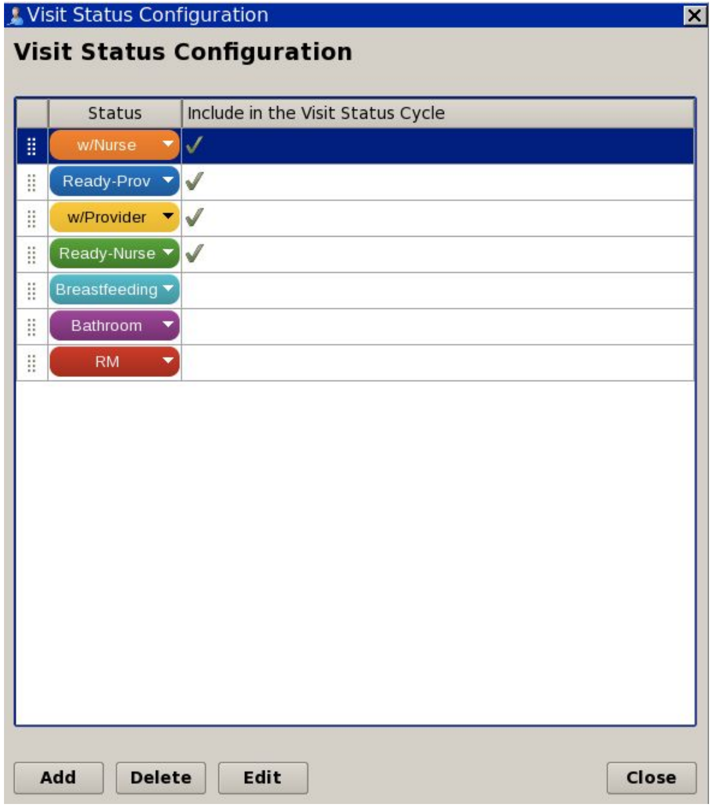
THRIVING THROUGH CHANGE

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



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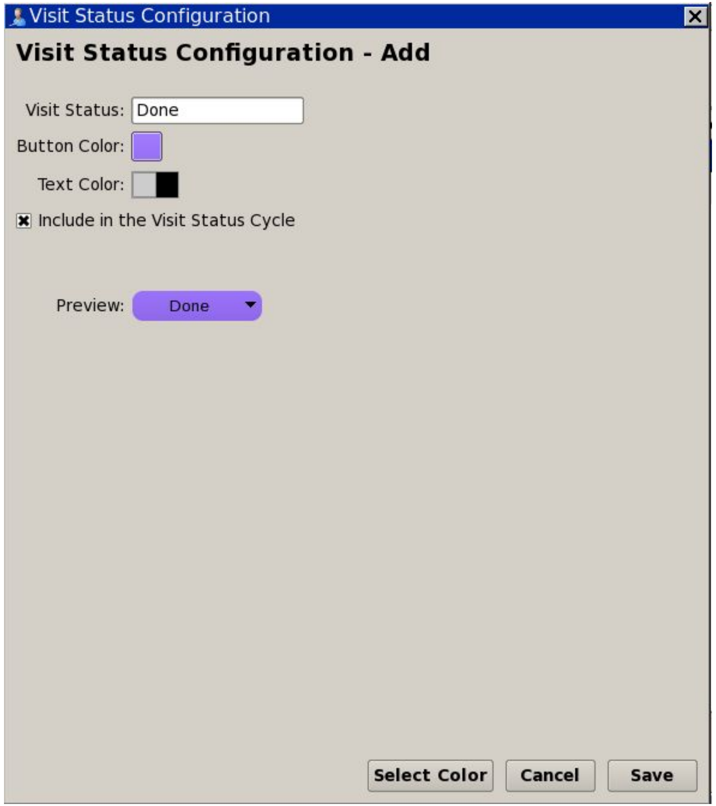
THRIVING THROUGH CHANGE

Add New Visit Status



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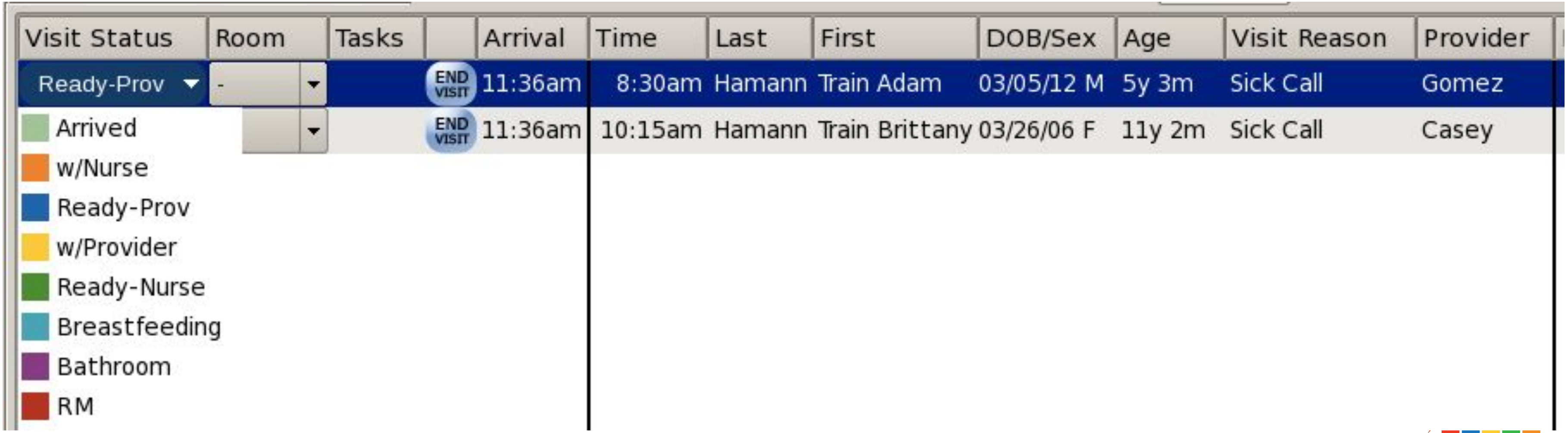
THRIVING THROUGH CHANGE

Visit Status Options on Schedule Screen



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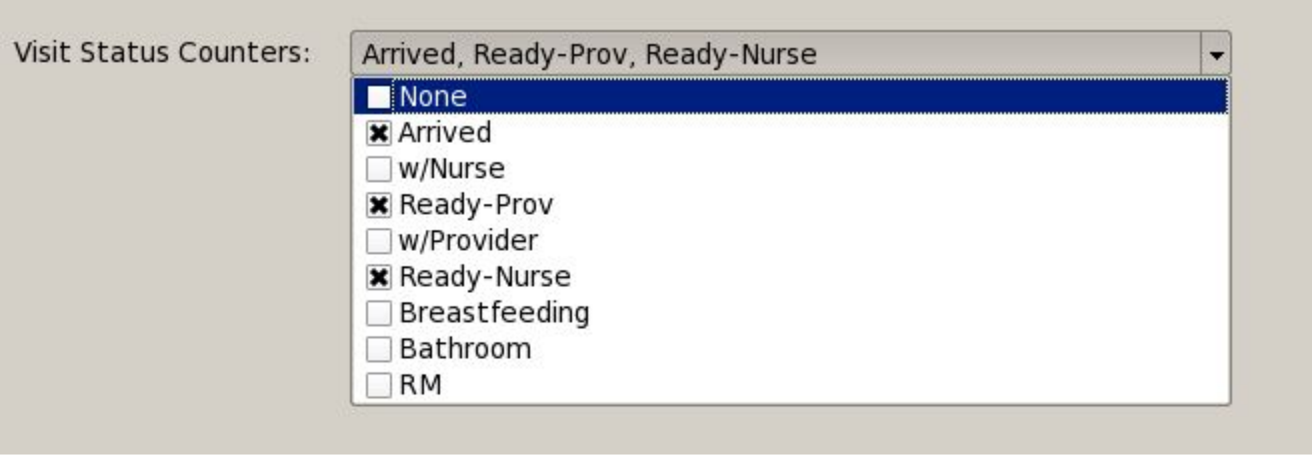
THRIVING THROUGH CHANGE

Choose Visit Status Counters in My Account



Visit Status Counters in the EHR

Patient Forms & Summaries

PCC Pediatric EHR Solutions

THRIVING THROUGH CHANGE

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.

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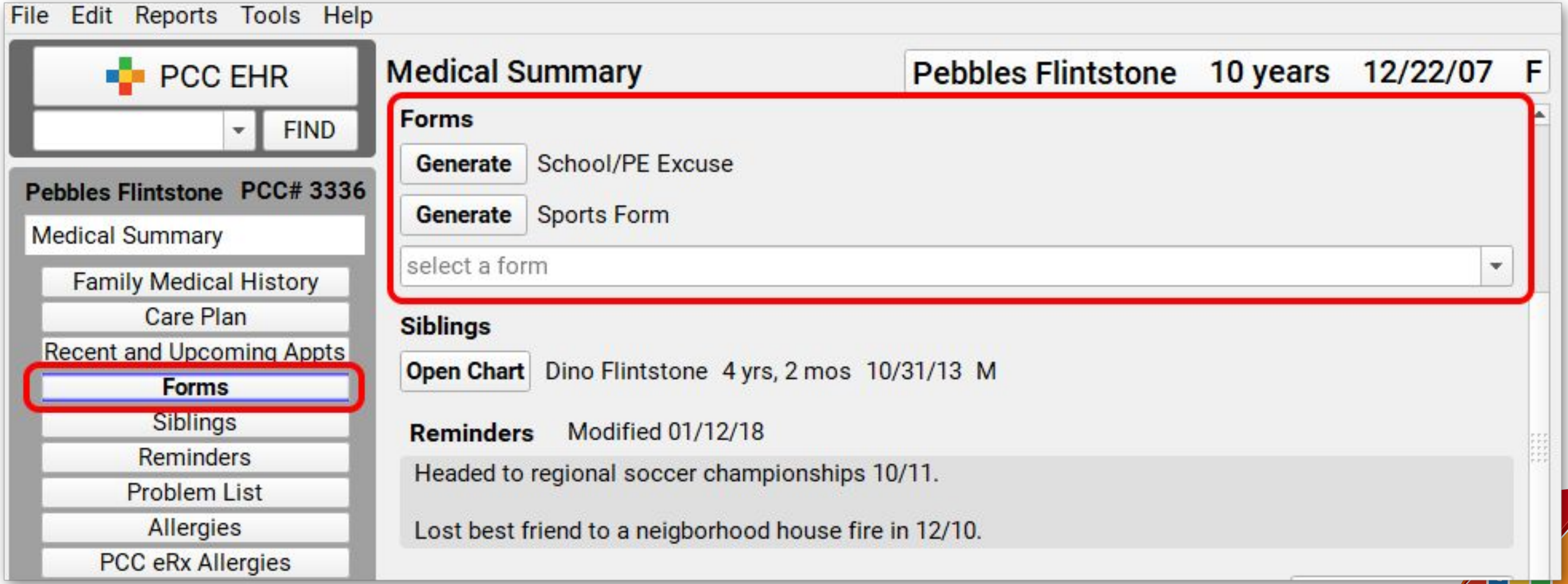
THRIVING THROUGH CHANGE

Generate Form Letters in PCC EHR



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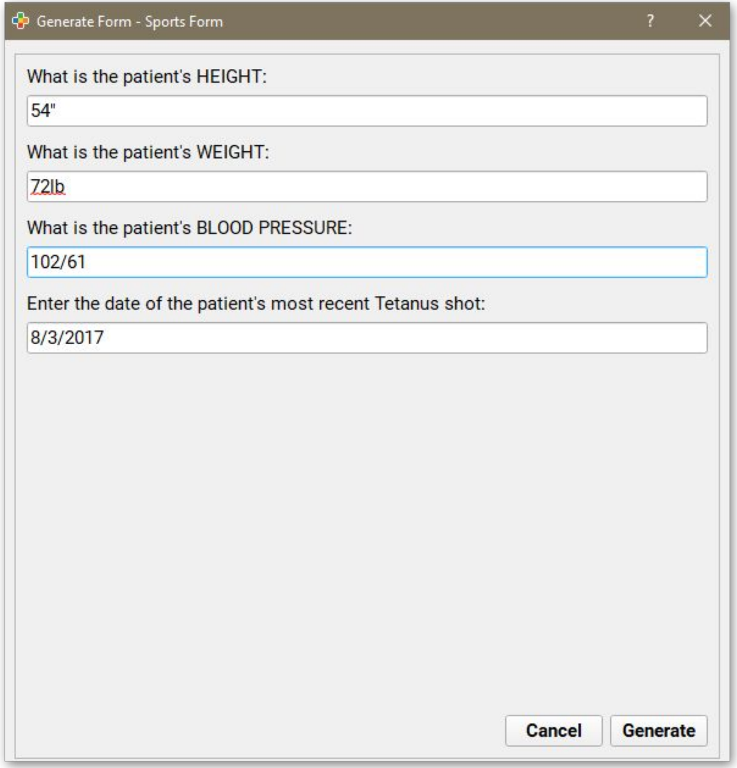
THRIVING THROUGH CHANGE

Generate Form Letters in PCC EHR



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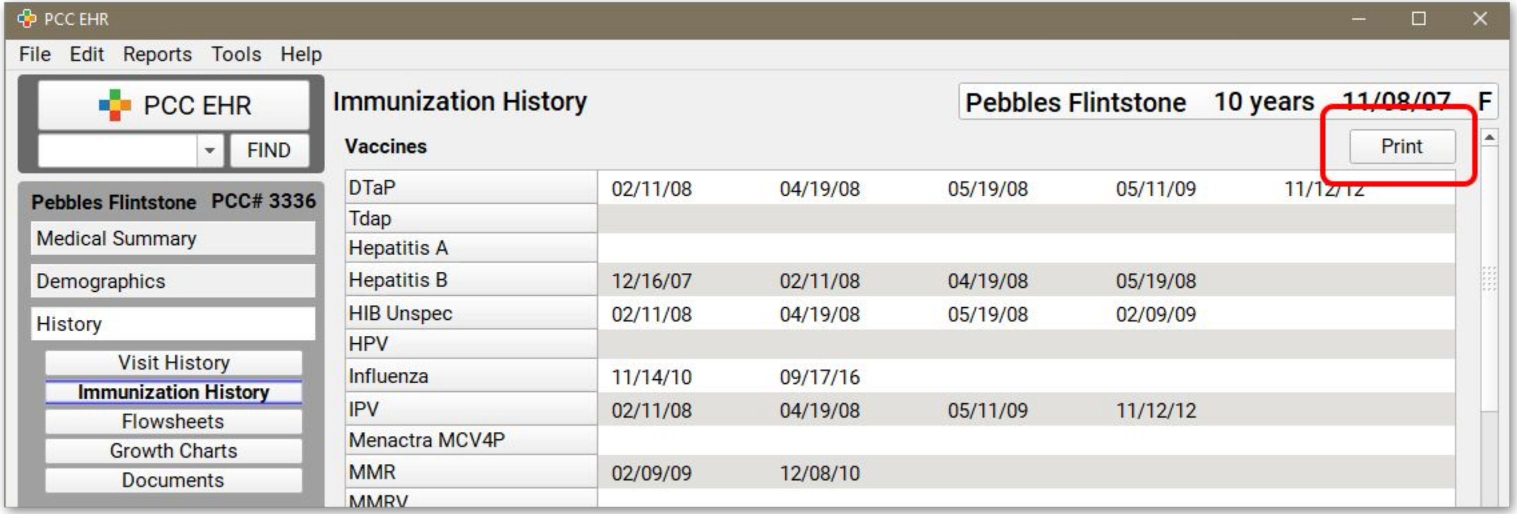
Generate Immunization Forms in PCC EHR



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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

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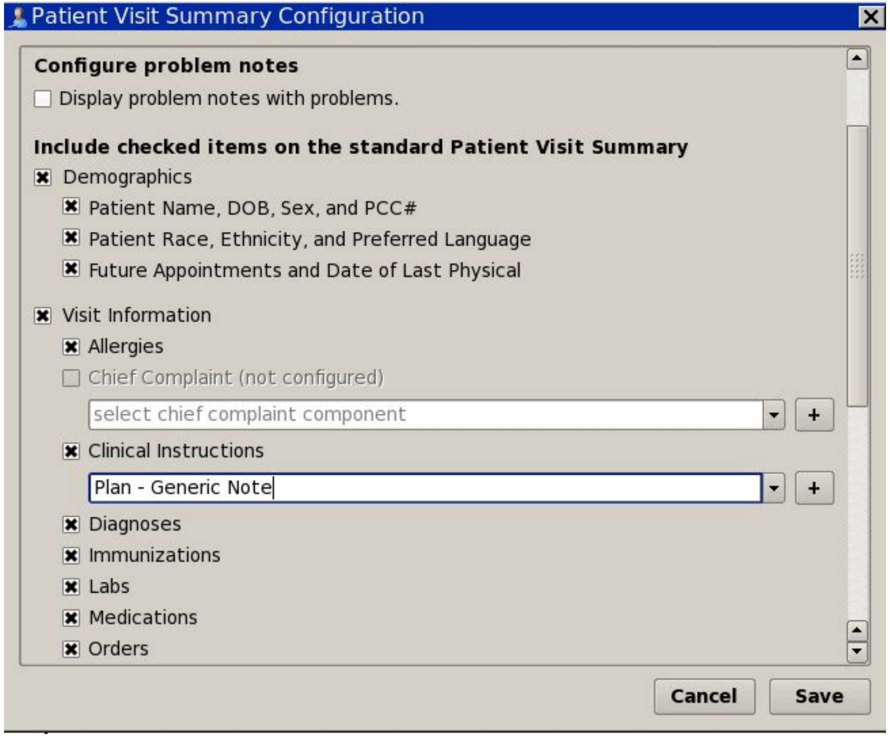
THRIVING THROUGH CHANGE

Configure Patient Visit Summary



PCC Pediatric EHR Solutions

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

Pediatric EHR Solutions