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

Lauren Smith, PMP
New Client Implementation Specialist

Q&A and Networking

While you're watching, please join us in the channel called "Live Session" in UC Chat.

You must register for UC Chat if you have not done so already.

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.

Scheduling Telemedicine Visits

Scheduling Telemedicine Visits

File	Edit	Reports	Tools	Configuration	Win
PCC EHR					Ctrl+1
Appointment Book					Ctrl+2
Import Documents					Ctrl+3
Practice Management					Ctrl+4
My Account					

PCC
Pediatric EHR Solutions

Scheduling Telemedicine Visits

Schedule Appointment | Add Block

Kendra Simpson 4y 4m 1/16/16 F ⊗

🟩 Sick Call ▼ | 10 min ±

Beverly Crusher, MD ▼ | PCP: *Unassigned*

W Winooski Pediatrics ▼ | ☐ All Locations

05/21/20 9:00am Thursday ⊗

Telemedicine visit

☑ **Telemedicine** | add Patient Link ▼

Clear | Open Chart | Details | Save

PCC
Pediatric EHR Solutions

Scheduling Telemedicine Visits

Visit Status	Room	Tasks	Arrival	Time	Last	First
Scheduled	◼◖			9:00am	Simpson	Kendra

Scheduling Telemedicine Visits

◼◖ **Sick - Bright Futures**

Appointment Details

Visit Status: Scheduled

Appt Time: 5/21/20 9:00am

Arrival Time: **Not Yet Arrived**

Visit Reason: Sick Call

Patient Age: 4 yrs, 4 mos

Location: Winooski Pediatrics

Provider: Beverly Crusher, MD ▾

Appt Note: Telemedicine visit

◼◖ **Telemedicine**

Patient Link: enter or select Patient Link ▾ *Link will display in patient portal*

Scheduling Telemedicine Visits

Thu 05/21/20 9:15am

Sick Call
Beverly Crusher, MD
🎥 Telemedicine Visit
Start visit at: ***Link not yet available***

UC
2020
Burlington, Vermont

PCC
Pediatric EHR Solutions

Charge Posting in PCC EHR

UC
2020
Burlington, Vermont

PCC
Pediatric EHR Solutions

Charge Posting in PCC EHR

Charge Posting in PCC EHR

Charge Posting in PCC EHR

Post Charges

Adam "Matt" Joe Hamann J.R.   5 yrs, 2 mos   3/08/15

Appointment Details

Visit Status:	Arrived ▾
Appt Time:	5/21/20 11:15am
Arrival Time:	5/21/20 11:17am
Visit Reason:	5yr Well Visit
Patient Age:	5 yrs, 2 mos
Location:	Lake Champlain Pediatrics
Billing POS:	Lake Champlain Pediatrics ▾
Provider:	Elizabeth Mary Casey, MD ▾
Appt Note:	

Visit Summary: **Print** **Decline**

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures			
✓	Z00.129	Encounter for routine child health examination without abnormal findings SNOMED: Well child visit	99393	All	None	Select
✓	Z71.3	Dietary counseling and surveillance SNOMED: Well child visit	99393	All	None	Select
✓	Z71.89	Other specified counseling SNOMED: Well child visit	99393	All	None	Select
✓	Z68.52	Body mass index (BMI) pediatric, 5th percentile to less than 85th percentile for age SNOMED: Well child visit	99393	All	None	Select
✓	Z23	Encounter for immunization	90707, 90716	All	None	Select
✓	Z13.9	Encounter for screening, unspecified	85018, 36415	All	None	Select

select an ICD-10 diagnosis

UC 2020 Burlington, Vermont

PCC — Pediatric EHR Solutions

Charge Posting in PCC EHR

✕ Link Procedures to a Diagnosis ✕

Link Procedures to a Diagnosis

Diagnosis: J02.9 Acute pharyngitis, unspecified

Select All   **Select None**

Select	CPT	Description
✓	99213	OV Expanded Focus
☐	85018	Hemoglobin
☐	36415	Finger Stick
✓	87880	Rapid Strep Screen
☐	69210	Cerumen Removal

Cancel   **Save**

UC 2020 Burlington, Vermont

PCC — Pediatric EHR Solutions

Charge Posting in PCC EHR

Procedures   Primary: Health Assurance

Procedures		Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Source
✓ **99393 Well Child 5-11 yrs**		1	100.00	Primary ▼	85.00	0.00	15.00	Electronic Encounter Form
▶ Dx: 1) Z00.129 2) Z71.3 3) Z71.89 4) Z68.52								
✓ **90707 MMR Vaccine**		1	80.00	Primary ▼	80.00	0.00	0.00	Immunization (Ordered)
▶ Dx: 1) Z23								
✓ **90716 Varicella Vaccine**		1	110.00	Primary ▼	110.00	0.00	0.00	Immunization (Ordered)
▶ Dx: 1) Z23								
✓ **85018 Hemoglobin**		1	20.00	Primary ▼	20.00	0.00	0.00	Lab (Completed) DETAILS⧉
▶ Dx: 1) Z13.9								
✓ 36415 Finger Stick	▼	1	10.00	Primary ▼	10.00	0.00	0.00	Lab (Completed) DETAILS⧉
▶ Dx: 1) Z13.9								
Totals:			320.00		305.00	0.00	15.00	

select a procedure   ▼

Claim Information   Service Provider: Casey   PCP: None

Billing Provider:	Elizabeth Mary Casey, MD ▼	Emergency Visit:	● No ○ Yes
Referring Provider:	select a referring provider ▼	Accident Date:	
EPSDT Referral Indicator:	select an EPSDT referral indicator ▼	Auto Accident:	● No ○ Yes
Prior Authorization Number:		Accident State:	select a state ▼
Date First Seen:			

Charge Posting in PCC EHR

Payments

Elaine B. Hamann (Account # 1612)

Patient	Visit Reason	Insurance	Pers Due	Description
Adam "Matt" Joe Hamann J.R.	5yr Well Visit	Health Assurance CCPPO $15	15.00	**Today's Visit**
			20.00	Previous Balance (as of 05/21/20)
			0.00	Payment
			35.00	Balance

Payment Type		Amount	Check #	Apply to Today's Visit	Apply to Prev Bal	Unapplied
▼		0.00		0.00	0.00	0.00

Add Payment

Receipts

☐ Generate a receipt

Previous   Next   Visit Note   Cancel   Save + Post

Charge Posting in PCC EHR

11:00am	Whitehead	Heather	12/21/19 F	5m	4mo Well Visit	Williams	
11:15am	Hamann J.R.	Adam "Matt" Joe	03/08/15 M	5y 2m	5yr Well Visit	Casey	Posted
11:45am	Bricker	Kevin L.	04/20/05 M	15y 1m	Recheck	Williams	

Search Visit History Index

Search Visit History Index

Search Visit History Index

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

PCC
Pediatric EHR Solutions

Copy Notes to Siblings

PCC
Pediatric EHR Solutions
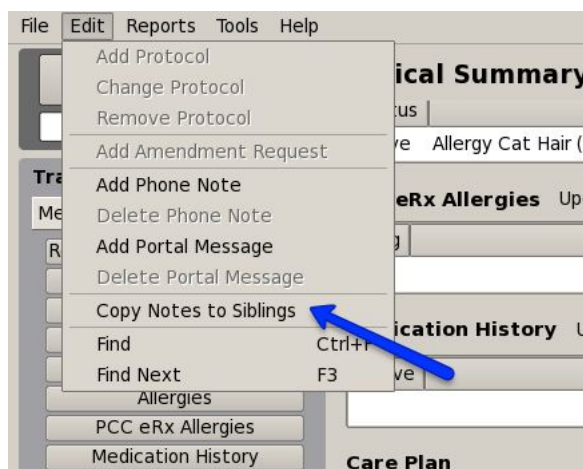
Copy Notes to Siblings

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	

PCC
Pediatric EHR Solutions

Copy Notes to Siblings

Copy Notes to Sibings

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

PCC
Pediatric EHR Solutions

Ordering from Phone Note and Portal Message
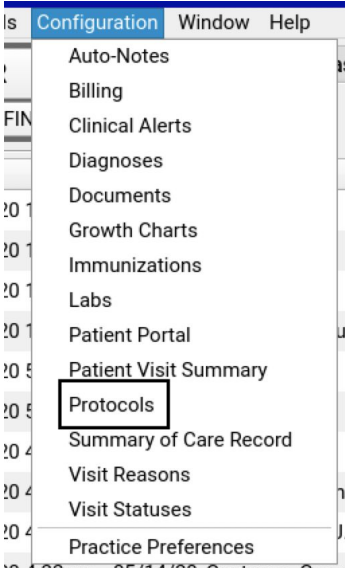
Ordering from Phone Note and Portal Message

Orders Follow-up
Phone Note
Portal Message
Pnd Check

Ordering from Phone Note and Portal Message

Phone Note

Encounter Details

Provider | select a provider ▾
Location | Winooski Pediatrics ▾

Ordering from Phone Note and Portal Message

Ordering from Phone Note and Portal Message

Charting from PocketPCC

Last 10 Patients
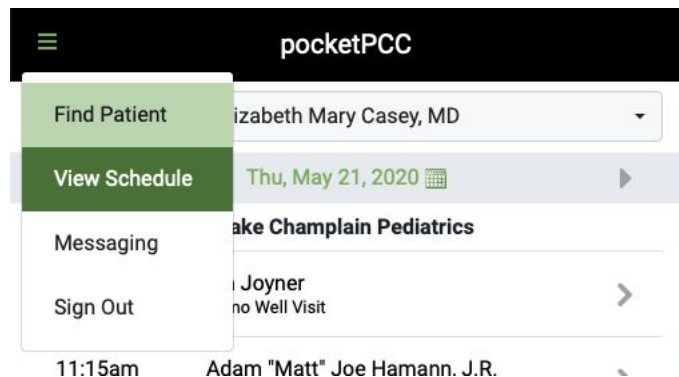
Last 10 Patients

Enter Vitals in Pocket PCC

Chart Portions of Visit

Chart Portions of Visit

Chart Portions of Visit

Intake

Informant/Relationship

Informant questions or concerns

Concerns

Vitals

Weight

Chart Portions of Visit

Physical Exam

Make All: ABN NL N/E

General Appearance
ABN NL N/E

Well appearing. Well developed and well nourished.

Head
ABN NL N/E

Normal shape. Atraumatic.

Eyes
ABN NL N/E

Symmetric light reflex. EOMI. Pupils equally round and

Ears
ABN NL N/E

Clear TM's bilaterally.

Nose
ABN NL N/E

No rhinorrhea.

Chart Portions of Visit

Physical Exam

Make All: ABN NL N/E

ABN NL N/E

○ ◉ ○ General Appearance

> Well appearing. Well developed and well nourished.

○ ◉ ○ Head

> Normal shape. Atraumatic.

○ ◉ ○ Eyes

> Symmetric light reflex. EOMI. Pupils equally round and reactive.

○ ◉ ○ Ears

> Clear TM's bilaterally.

○ ◉ ○ Nose

> No rhinorrhea.

○ ◉ ○ Mouth

> notes

○ ◉ ○ Teeth (caries, white spots, staining)

> Normal dentition for age. No caries.

○ ◉ ○ Neck

> Supple. No lymphadenopathy.

ABN NL N/E

PCC Pediatric EHR Solutions

Patient Portal

PCC Pediatric EHR Solutions

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.

PCC
Pediatric EHR Solutions

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

PCC
Pediatric EHR Solutions

Portal Users Component

Patient Portal Users

This patient has no associated portal users.

Add Portal User

Add Portal User

Add Portal User

Manage Portal User

Add Portal User

*Email Address: wilma@bedrock.com

*First Name: Wilma

*Last Name: Flintstone

Phone Number: 800-722-1082

*required

Clear | Add User

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

UC
2020
Burlington, Vermont

PCC
Pediatric EHR Solutions

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

UC
2020
Burlington, Vermont

PCC
Pediatric EHR Solutions

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

UC 2020 Burlington, Vermont

PCC Pediatric EHR Solutions

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 [enter user name ▾]

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?
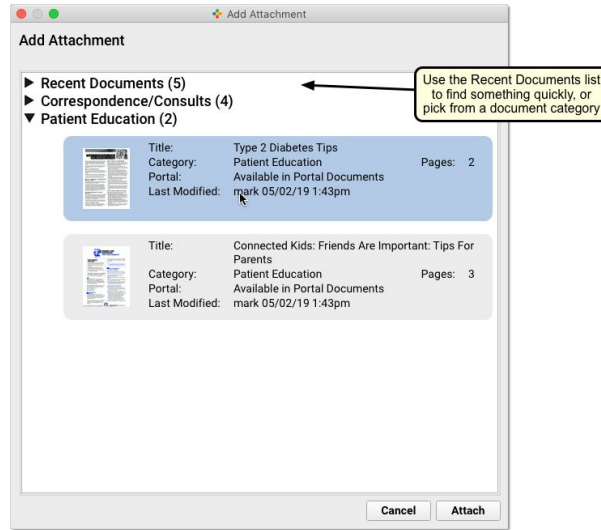-Ansel

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.
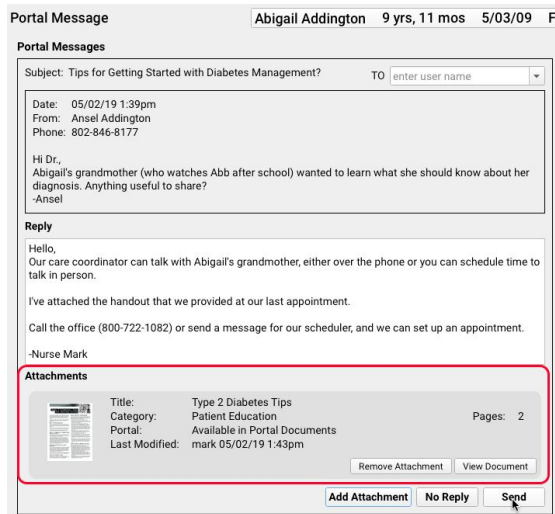
-Nurse Mark

[Add Attachment]   [No Reply]   [Send]

UC 2020 Burlington, Vermont

PCC Pediatric EHR Solutions

Attach Documents to Portal Messages

Attach Documents to Portal Messages

Attach Documents to Portal Messages

Portal Message Templates

Portal Message Templates

Portal Message Templates

Portal Message Templates

Upcoming Features

- Chat within PCC EHR
- Attach documents to a future visit
- Sign up for Patient Portal with a phone number
- Text Expander within PCC EHR

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.

What Questions Do You Have?

Questions posted in the Live Session channel of UC Chat will be read aloud by moderator for presenter to answer. Please post your questions in Live Session.

Related Courses

UC2020 course recordings will be available for later viewing on [PCC's UC 2020 YouTube Channel](#)

1. PCC June COVID-19 Release
    a. May 27 12:00 pm - 1:00 pm (ET)
    b. May 29 3:00 pm - 4:00 pm (ET)

UC
2020
Burlington, Vermont

PCC
Pediatric EHR Solutions