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

<table>
<thead>
<tr>
<th>File</th>
<th>Edit</th>
<th>Reports</th>
<th>Tools</th>
<th>Configuration</th>
<th>Win</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCC EHR</td>
<td></td>
<td></td>
<td></td>
<td>Ctrl+1</td>
<td></td>
</tr>
<tr>
<td>Appointment Book</td>
<td></td>
<td></td>
<td></td>
<td>Ctrl+2</td>
<td></td>
</tr>
<tr>
<td>Import Documents</td>
<td></td>
<td></td>
<td></td>
<td>Ctrl+3</td>
<td></td>
</tr>
<tr>
<td>Practice Management</td>
<td></td>
<td></td>
<td></td>
<td>Ctrl+4</td>
<td></td>
</tr>
</tbody>
</table>

Schedule Appointment

- **Kendra Simpson** 4y 4m 1/16/16 F
- **Sick Call**
- Duration: 10 min
- **Beverly Crusher, MD**
- **Winooski Pediatrics**
- **PCP: Unassigned**
- **All Locations**
- **05/21/20 9:00am Thursday**
- **Telemedicine visit**

- **Telemedicine**
- Add Patient Link

Clear | Open Chart | Details | Save
Scheduling Telemedicine Visits

<table>
<thead>
<tr>
<th>Visit Status</th>
<th>Room</th>
<th>Tasks</th>
<th>Arrival</th>
<th>Time</th>
<th>Last</th>
<th>First</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled</td>
<td>☐</td>
<td>☐</td>
<td></td>
<td>9:00am</td>
<td>Simpson</td>
<td>Kendra</td>
</tr>
</tbody>
</table>

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

Charge Posting in PCC EHR
Charge Posting in PCC EHR

<table>
<thead>
<tr>
<th>Time</th>
<th>Name</th>
<th>Date</th>
<th>Age</th>
<th>Patient Type</th>
<th>Provider</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:00am</td>
<td>Whitehead</td>
<td>12/21/19 F</td>
<td>5m</td>
<td>4mo Well Visit</td>
<td>Williams</td>
<td></td>
</tr>
<tr>
<td>11:15am</td>
<td>Hamann J.R.</td>
<td>03/08/15 M</td>
<td>5y 2m</td>
<td>Syr Well Visit</td>
<td>Casey</td>
<td>Ready To Post</td>
</tr>
<tr>
<td>11:45am</td>
<td>Bricker</td>
<td>04/20/05 M</td>
<td>15y 1m</td>
<td>Recheck</td>
<td>Williams</td>
<td></td>
</tr>
<tr>
<td>1:30pm</td>
<td>Nakomunc T.</td>
<td>04/15/03 M</td>
<td>13y 1m</td>
<td>Problem</td>
<td>Williams</td>
<td></td>
</tr>
</tbody>
</table>
Charge Posting in PCC EHR

Post Charges

Appointment Details

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

Diagnoses

<table>
<thead>
<tr>
<th>ICD-10</th>
<th>Description</th>
<th>Linked Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td>208.129</td>
<td>Encounter for routine child health examination without abnormal findings (sexual well-child visit)</td>
<td>99393</td>
</tr>
<tr>
<td>271.1</td>
<td>Dietary counseling and surveillance</td>
<td>99393</td>
</tr>
<tr>
<td>271.89</td>
<td>Other specified counseling (sexual well-child visit)</td>
<td>99393</td>
</tr>
<tr>
<td>208.52</td>
<td>Body mass index (BMI) pediatric, 5th percentile to less than 85th percentile for age (sexual well-child visit)</td>
<td>99393</td>
</tr>
<tr>
<td>223</td>
<td>Encounter for immunization</td>
<td>90702, 90716</td>
</tr>
<tr>
<td>213.9</td>
<td>Encounter for screening, unspecified</td>
<td>85018, 36415</td>
</tr>
</tbody>
</table>

(select an ICD-10 diagnosis)

Charge Posting in PCC EHR

Link Procedures to a Diagnosis

Diagnosis: J02.9 Acute pharyngitis, unspecified

Select All | Select None

<table>
<thead>
<tr>
<th>Select</th>
<th>CPT</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>99213</td>
<td>OV Expanded Focus</td>
</tr>
<tr>
<td></td>
<td>85018</td>
<td>Hemoglobin</td>
</tr>
<tr>
<td></td>
<td>36415</td>
<td>Finger Stick</td>
</tr>
<tr>
<td>✔</td>
<td>87880</td>
<td>Rapid Strep Screen</td>
</tr>
<tr>
<td></td>
<td>69210</td>
<td>Cerumen Removal</td>
</tr>
</tbody>
</table>

Save
Charge Posting in PCC EHR

### Procedures

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Units</th>
<th>Price</th>
<th>Insurance</th>
<th>Ins Due</th>
<th>Ins Adj</th>
<th>Pers Due</th>
<th>Source</th>
</tr>
</thead>
</table>
| 99393 Well Child 5-11 yrs | 1 | 100.00 | Primary | 85.00 | 0.00 | 15.00 | 82.00  
  | | | | | | | Electronic Encounter Form |
| 90707 MMR Vaccine | 1 | 80.00 | Primary | 80.00 | 0.00 | 0.00 | Immunization (Ordered) |
| 90716 Varicella Vaccine | 1 | 110.00 | Primary | 110.00 | 0.00 | 0.00 | Immunization (Ordered) |
| 85018 Hemoglobin | 1 | 20.00 | Primary | 20.00 | 0.00 | 0.00 | Lab (Completed) DETAILsf |
| 36415 Finger Stick | 1 | 10.00 | Primary | 10.00 | 0.00 | 0.00 | Lab (Completed) DETAILsf |

**Totals:**

| | | | | | | | |
| | 320.00 | 305.00 | 0.00 | 15.00 |

#### Claim Information

- Service Provider: Casey  
- PCP: None  
- Referring Provider: select a referring provider  
- EPIDIT Referral Indicator: select an EPIDIT referral indicator  
- Date First Seen:  

#### Payments

<table>
<thead>
<tr>
<th>Patient</th>
<th>Visit Reason</th>
<th>Insurance</th>
<th>Pers Due Description</th>
</tr>
</thead>
</table>
| Adam "Matt" Joe Hamann J.R. | Syr Well Visit | Health Assurance CCPO | $15  
  | | | 15.00 Today's Visit  
  | | | 20.00 Previous Balance (as of 05/21/20)  
  | | | 0.00 Payment  
  | | | 35.00 Balance |

#### Receipts

- Generate a receipt
### Charge Posting in PCC EHR

<table>
<thead>
<tr>
<th>Time</th>
<th>Name</th>
<th>Date</th>
<th>Age</th>
<th>Visit Type</th>
<th>Provider</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:00am</td>
<td>Whitehead Heather</td>
<td>12/21/19</td>
<td>5m</td>
<td>4 mo Well Visit</td>
<td>Williams</td>
<td></td>
</tr>
<tr>
<td>11:15am</td>
<td>Hamann J.R. Adam &quot;Matt&quot; Joe</td>
<td>03/08/15</td>
<td>5y 2m</td>
<td>5 yr Well Visit</td>
<td>Casey</td>
<td>Posted</td>
</tr>
<tr>
<td>11:45am</td>
<td>Bricker Kevin L.</td>
<td>04/20/05</td>
<td>15y 1m</td>
<td>Recheck</td>
<td>Williams</td>
<td></td>
</tr>
</tbody>
</table>

### Search Visit History Index
Search Visit History Index

Visit History Index

Tasks | Date | Age | Protocol | Details | Provider
--- | --- | --- | --- | --- | ---
07/21/20 | 10y 2m | Sick - Bright Futures | Dr: Abnormal gait | Casey
05/14/20 | 10y | Sick - Bright Futures | Dr: Japanese encephalitis virus disease, Gastritis, Otitis externa of bilateral ears | Casey
05/12/20 | 10y | Sick - Bright Futures | Dr: none | Gomez
05/12/20 | 10y | Sick - Bright Futures | Dr: none | Casey
05/12/20 | 10y | Phone Note | Subject: Need to schedule camp physical | n/a
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
## Family Medical History

<table>
<thead>
<tr>
<th>Condition</th>
<th>Relationship</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eczema</td>
<td>Brother</td>
<td></td>
</tr>
<tr>
<td>Anemia</td>
<td>Maternal A</td>
<td>Copy Family Medical History to Siblings</td>
</tr>
<tr>
<td>Epilepsy</td>
<td>Maternal Uncle, Mother</td>
<td></td>
</tr>
</tbody>
</table>

### Copy Notes to Siblings

**Family Medical History**

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

---

**Copy Notes to Siblings**

**From:** Train Pebbles Flintstone - 10 yrs, 1 mo  
**To:** Train Dino Flintstone - 4 yrs, 2 mos

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

---

**Actions:** Back, Save, Cancel
Ordering from Phone Note and Portal Message
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

#### Phone Note

<table>
<thead>
<tr>
<th>Order</th>
<th>select a screening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>select an injection</td>
</tr>
<tr>
<td>Order</td>
<td>select a lab</td>
</tr>
<tr>
<td>Order</td>
<td>select a medical procedure</td>
</tr>
<tr>
<td>Order</td>
<td>select a medical test</td>
</tr>
<tr>
<td>Order</td>
<td>select a radiology</td>
</tr>
<tr>
<td>Order</td>
<td>select a surgical procedure</td>
</tr>
<tr>
<td>Order</td>
<td>select a referral</td>
</tr>
</tbody>
</table>

#### Portal Message

| select diagnosis or active problem |
| notes |
| Order | select an injection |
| Order | select a screening |
| Order | select a lab |
| Order | select a medical procedure |
| Order | select a medical test |
| Order | select a radiology |
| Order | select a surgical procedure |
| Order | select a referral |
Charting from PocketPCC

Last 10 Patients

PocketPCC

Find Patient

View Schedule

Messaging

Sign Out

Elizabeth Mary Casey, MD

Thu, May 21, 2020

Lake Champlain Pediatrics

Joyner

Well Visit

11:15am

Adam "Matt" Joe Hamann, J.R.
Last 10 Patients

Recent Patients
- Pebbles Flintstone, 10y, F
- Adam "Matt" Joe Hamann, J.R., 9y, M
- Shaquana Padrone, 10y, F
- Mariaела Mouse, 13y, F
- Aimee Flanagan, 11m, F
- Faith J. Flanagan, J.R., 4y, 3m, F
- Andrew J. Zimm, 19y, 11m, M
- Abigail C. Depew, 3y, 8m, F
- Abigail Bingeman, 18y, 8m, F
- Abigail Addington, 9y, 11m, F

Enter Vitals in Pocket PCC

Visit: 07/05/18
- Sickle Bright Futures
- Appointment Details
  - Intake: 88 lbs 6 oz
  - History
  - Review of Systems
  - Social/Family History
  - Physical Exam
  - Diagnoses
  - Lab
  - Medical Test
  - Radiology
  - Medical Procedures
  - Immunizations
  - Plan
  - Forms
  - Prescriptions
  - Visit Documents
  - Amendment Requests

Vitals
- Weight: 88 lbs 6 oz
- Height: 57 in (144.78 cm)
- Temperature: 98.4 °F
- BMI: 19.1 kg/m²

Entered by Dr. Casey
Chart Portions of Visit

Visit - 05/21/20

Appointment Details

Appt Time: 05/21/20  11:15am
Arrival Time: 05/21/20  11:17am
Visit Reason: 5yr Well Visit
## Chart Portions of Visit

<table>
<thead>
<tr>
<th>Physical Exam</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical Exam</strong></td>
</tr>
<tr>
<td><strong>Make All:</strong> ABN NL N/E</td>
</tr>
<tr>
<td><strong>General Appearance</strong></td>
</tr>
<tr>
<td>ABN NL N/E</td>
</tr>
<tr>
<td>Well appearing. Well developed and well nourished.</td>
</tr>
<tr>
<td><strong>Head</strong></td>
</tr>
<tr>
<td>ABN NL N/E</td>
</tr>
<tr>
<td>Normal shape. Atraumatic.</td>
</tr>
<tr>
<td><strong>Eyes</strong></td>
</tr>
<tr>
<td>ABN NL N/E</td>
</tr>
<tr>
<td>Symmetric light reflex, EOMI. Pupils equally round and</td>
</tr>
<tr>
<td><strong>Ears</strong></td>
</tr>
<tr>
<td>ABN NL N/E</td>
</tr>
<tr>
<td>Clear TM's bilaterally.</td>
</tr>
<tr>
<td><strong>Nose</strong></td>
</tr>
<tr>
<td>ABN NL N/E</td>
</tr>
<tr>
<td>No rhinorrhea.</td>
</tr>
</tbody>
</table>
### Chart Portions of Visit

#### Physical Exam

<table>
<thead>
<tr>
<th>Make All</th>
<th>ABN</th>
<th>NL</th>
<th>N/E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ABN NL N/E</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **General Appearance**
  - Well appearing. Well developed and well nourished.
- **Head**
  - Normal shape. Atraumatic.
- **Eyes**
  - Symmetric light reflex. **EOMI**. Pupil equally round and reactive.
- **Ears**
  - Clear **TMs** bilaterally.
- **Nostril**
  - No rhinorrhea.
- **Mouth**
  - Normal dentition for age. No caries.
- **Neck**
  - Supple. No lymphadenopathy.

---

### Patient Portal

---
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.

![Portal Users Component](image)

Review portal users who can view this patient, along with their recent activity.
Portal Users Component

Patient Portal Users
This patient has no associated portal users.
Add Portal User

Add Portal User

*Email Address: wilma@bedrock.com
*First Name: Wilma
*Last Name: Flintstone
Phone Number: 800-722-1082
*required

Sign in details will be automatically sent to the Portal User’s email address.

Open the Patient Portal Manager to reset a password, adjust patient access, and more
Portal Users Component

Patient Portal Users

Manage Portal User

<table>
<thead>
<tr>
<th>Name</th>
<th>Terry Manning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Login</td>
<td>07/19/18 11:36am</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:tmanning@kobolds.net">tmanning@kobolds.net</a></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Unread Messages</td>
<td>0</td>
</tr>
<tr>
<td>Balances</td>
<td>Kevin M Manning (Account # 56)</td>
</tr>
<tr>
<td>Unviewed Documents</td>
<td>0</td>
</tr>
</tbody>
</table>

Manage Portal User

Name: Wilma Flintstone
Email: wilma@bedrock.com
Phone: 802-722-1082

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.

Attach Documents to Portal Messages

Portal Message

<table>
<thead>
<tr>
<th>Subject</th>
<th>Tips for Getting Started with Diabetes Management?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>05/02/19 1:39pm</td>
</tr>
<tr>
<td>From</td>
<td>Arisel Addington</td>
</tr>
<tr>
<td>Phone</td>
<td>802-846-8177</td>
</tr>
</tbody>
</table>

Hi Dr,
Abigail’s grandmother (who watches Abb after school) wanted to learn what she should know about her diagnosis. Anything useful to share?
-Arisel

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
Attach Documents to Portal Messages

![Image of Windows Explorer window]

- Use the Recent Documents list to find something quickly, or dock from a document category.

---

Attach Documents to Portal Messages

![Image of Portal Message]

- Portal Message: Tips for Getting Started with Diabetes Management
  - Date: 05/02/19 1:39pm
  - From: Abigail Addington
  - Phone: 802.446.6177

  "Dr.,
  Abigail's grandmother (who watches Abbi after school) wanted to learn what she should know about her diagnosis. Anything you'd want to share?
  -Abigail"

- Reply:
  - Hi Abigail,
  - 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 (802-722-1082) or send a message for our schedule, and we can set up an appointment.
  - Nurse Mark

- Attachments:
  - Title: Type 2 Diabetes Tips
  - Category: Patient Education
  - Portal: Available in Portal Documents
  - Pages: 2
  - Last Modified: mark 05/02/19 1:43pm

---
Attach Documents to Portal Messages

Portal Message Templates
Portal Message Templates
Portal Message Templates

<table>
<thead>
<tr>
<th>Configuration</th>
<th>Messaging Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Secure Messaging Templates - Edit</td>
</tr>
<tr>
<td></td>
<td>Subject: Appointment Request</td>
</tr>
<tr>
<td></td>
<td>Assign incoming portal messages from this template to: Unassigned</td>
</tr>
<tr>
<td></td>
<td>Build Template</td>
</tr>
</tbody>
</table>

- Appointment Provider
  - Allows one selection from a dropdown list of providers (list includes option ‘Any Provider’).
  - Choose a Provider

- Appointment Location
  - Allows one selection from a dropdown list of scheduling locations (list includes option ‘Any Location’).
  - Choose a Location

- Input box - email
  - Allows input of one line of text. Recommended when a single word or short answer is desired.
  - Appointment Reason

- Appointment Date
  - Displays text “On or after” and allows selection of a single date.
  - Preferred Appointment Date

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)