

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

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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
<hr/>					
My Account					



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



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:

Appt Note: Telemedicine visit

■ Telemedicine

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

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	Ready To Post
11:45am	Bricker Kevin L.	04/20/05	M	15y 1m	Recheck	Williams	
1:20pm	Nakamura T. Joshua	04/15/07	M	12y 1m	Problem	Williams	



Charge Posting in PCC EHR

PCC EHR Post Charges - Patient Details Adam "Matt" Joe Hamann J.R. 5 yrs, 2 mos 3/08/15 M

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:

Insurance Eligibility
 Appt: 5yr Well Visit 05/21/20 11:15am Elizabeth Mary Casey, MD
 PCP: None
 Eligibility Notes:

Health Insurance CCPPPO \$15
 Copay: \$15.00 Cert: 850876892-04 Group: Ham127 Subscriber: Elaine B. Hamann
 Status: (mm/dd/yy)
 Eligibility Response: This insurance plan is not configured to submit eligibility requests.

Insurance	Copay	Certificate	Group	Start	End	Status
1. Health Assurance CCPPPO \$15	\$15.00	850876892-04	Ham127	07/28/17		Active

Account Balances
 Elaine B. Hamann (Account # 1612)

	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	20.00	0.00	20.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Previous Next Visit Note Cancel Save Save + Post

PCC News Signed in: pcc at Winoski



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 Visit Summary: [Print](#) [Decline](#)

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:

Diagnoses

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

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](#)

Select	CPT	Description
<input checked="" type="checkbox"/>	99213	OV Expanded Focus
<input type="checkbox"/>	85018	Hemoglobin
<input type="checkbox"/>	36415	Finger Stick
<input checked="" type="checkbox"/>	87880	Rapid Strep Screen
<input type="checkbox"/>	69210	Cerumen Removal

[Cancel](#) [Save](#)



Charge Posting in PCC EHR

Procedures Primary: Health Assurance

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

select a procedure

Claim Information Service Provider: Casey PCP: None

Billing Provider: Emergency Visit: No Yes

Referring Provider: Accident Date:

EPSDT Referral Indicator: Auto Accident: No Yes

Prior Authorization Number: Accident 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 CCPPPO \$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
<input type="text"/>	0.00	<input type="text"/>	0.00	0.00	0.00

Receipts

Generate a receipt



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

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



Search Visit History Index

Sick - Bright Futures

Appointment Details
 Appt Time: 05/14/20 4:05pm
 Arrival Time: 05/14/20 5:05pm
 Visit Reason: Sick Call
 Patient Age: 10 years
 Location: Lake Champlain Pediatrics
 Provider: Elizabeth Mary Casey, MD
 Appt Note: Created by: Elizabeth Casey, M.D.

Intake

Chief Complaint
 sore throat [PCC PCC]
 ear pain [PCC PCC]

Diagnoses
 ✓ Japanese encephalitis virus disease
 ICD-10 A83.0 Japanese encephalitis
 Added to Problem List
 ✓ Gastritis
 ICD-10 K29.70 Gastritis, unspecified, without bleeding

Tasks	Date	Age	Protocols	Details	Provider	Docs
✓	05/14/20	10y	Sick - Bright Futures	Dx: Japanese encephalitis virus disease, Gastritis, Otitis externa of bilateral ears	Casey	
	05/12/20	10y	Sick - Bright Futures	Dx: none	Gomez	

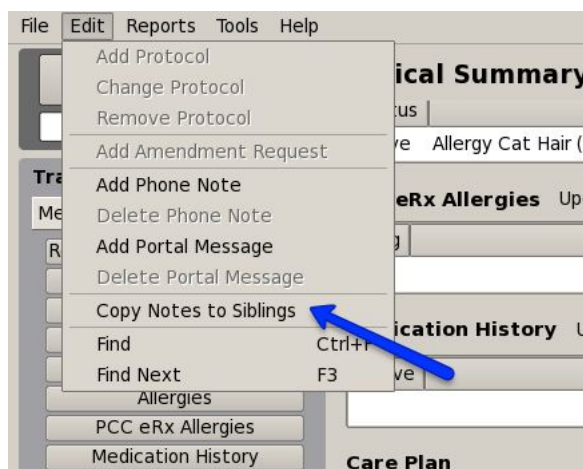


Copy Notes to Siblings

- 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



Copy Notes to Siblings



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	



Copy Notes to Siblings

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	

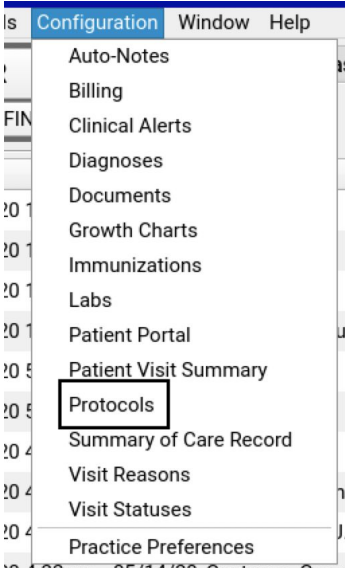
Back Save Cancel



Ordering from Phone Note and Portal Message



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

Location



Ordering from Phone Note and Portal Message

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

notes

Screening
Order select a screening

Injection
Order select an injection

Lab
Order select a lab

Medical Procedure
Order select a medical procedure

Medical Test
Order select a medical test

Radiology
Order select a radiology

Surgical Procedure
Order select a surgical procedure

Referral
Order select a referral



Ordering from Phone Note and Portal Message

Portal Message Pebbles Flintstone 10 years 4/24/10

select diagnosis or active problem

notes

Injection
Order select an injection

Screening
Order select a screening

Lab
Order select a lab

Medical Procedure
Order select a medical procedure

Medical Test
Order select a medical test

Radiology
Order select a radiology

Surgical Procedure
Order select a surgical procedure

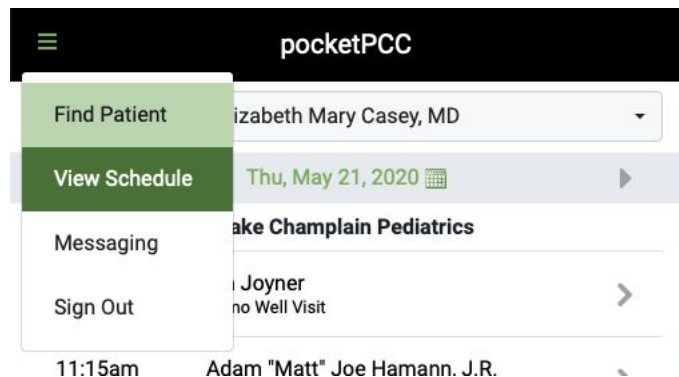
Referral
Order select a referral



Charting from PocketPCC



Last 10 Patients



Last 10 Patients

☰ pocketPCC

Find patient:

Recent Patients

- Pebbles Flintstone
10y, F
- Adam "Matt" Joe Hamann, J.R.
5y 2m, M
- Shaquana Padrone
16y 9m, F
- Matilda Mouse
13y, F
- Aimee Flanagan
11m 1w, F
- Faith J. Flanagan, JR.
4y 3m, F
- Andrew J. Zinn
15y 11m, M
- Abigail C. Depew
3y 8m, F
- Abigail Bingeman
18y 8m, F
- Abigail Addington
9y 11m, F



Enter Vitals in Pocket PCC

Vitals

Weight

88 lbs 1 oz (39.940 kg)
81st percentile (CDC)

Height

57 in (144.78 cm)
82nd percentile (CDC)

Temperature

98 °F

Oral

BMI (Estimated)

19.1 kg/m²
Height: 57 in - 07/11/18
78th percentile (CDC)
Healthy Weight

More

Visit: 07/05/18

Sick - Bright Futures

- Appointment Details
- Intake**
- 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 1 oz 81st percentile_(CDC) (39.944 kg)
Entered by Dr. Casey

Height 57 in 83rd percentile_(CDC) (144.78 cm)

Temperature 98 °F
Oral

98.4 °F
Tympanic

BMI 19.1 kg/m² 78th percentile_(CDC)
Healthy Weight

More

Hover over vitals to see who entered them



Chart Portions of Visit

The screenshot shows the 'pocketPCC' mobile application interface. At the top, there is a navigation bar with a hamburger menu icon on the left, the text 'pocketPCC' in the center, and a user profile icon on the right. Below the navigation bar, the patient's name 'Adam "Matt" Joe Hamann, J.R.' and demographic information '5y 2m 03/08/15 Male' are displayed. A menu of chart portions is open, listing options such as 'Medical Summary', 'Demographics', 'Visit History', 'Immunization History', 'Documents', 'Add Photo or File', 'Add Phone Note', and 'Add Portal Message'. The 'Visit History' option is currently selected and highlighted in green. On the left side of the screen, there are buttons for 'Family Medical History', 'Care Plan', and 'Recent and Upcoming Appointments'. Below these buttons, the text 'None' is visible. At the bottom of the screen, there is a section for 'Recent and Upcoming Appointments' with the following information: 'Last Visit: 05/14/20 (7d ago) Dr. Casey', 'Diagnosis: None', 'Last Physical: 05/21/20 (0d ago)', 'Next Physical Due: 05/27/21', and 'Scheduled Appointments:'. The UC 2020 logo is in the bottom left corner, and the PCC Pediatric EHR Solutions logo is in the bottom right corner.



Chart Portions of Visit

Visit - 05/21/20 Click Pencil to Edit

Appointment Details

Appt Time: 05/21/20 11:15am
Arrival Time: 05/21/20 11:17am
Visit Reason: 5vr Well 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.



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

Patient Portal Users

Manage Portal User	Name:	Last Login:
	Wilma Flintstone	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:	Last Login:
	Fred Flintstone	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



Portal Users Component

Patient Portal Users

This patient has no associated portal users.

[Add Portal User](#)

[Add Portal User](#)

[Manage Portal User](#)

Add Portal User

*Email Address:

*First Name:

*Last Name:

Phone Number:

*required

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



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

[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

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



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



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

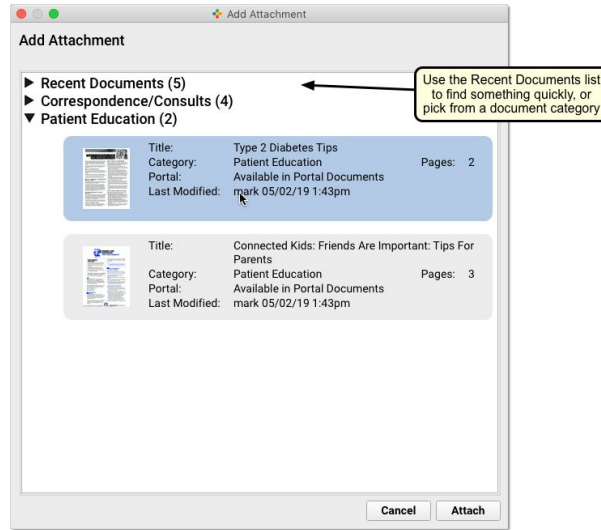
Reply

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

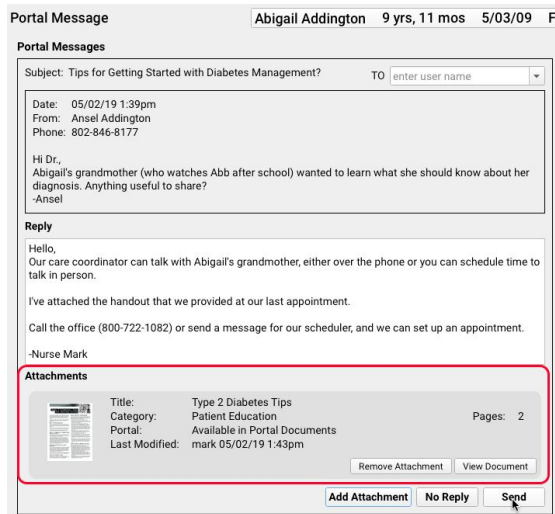
Add Attachment No Reply Send



Attach Documents to Portal Messages



Attach Documents to Portal Messages



Attach Documents to Portal Messages

The screenshot shows a patient portal message window titled "My Kid's Chart". At the top, there are "Back" and "Reply" buttons. The message is from Abigail Addington to Mark Williams, M.D., dated Thu 05/02/19 2:00pm. The subject is "Tips for Getting Started with Diabetes Management?". The message body contains text about a care coordinator and a handwritten note from Ansel Addington. A red box highlights the "Attachments" section, which contains one attachment: "05/02/19 - Type 2 Diabetes Tips". Below the attachment, the text from Ansel Addington is visible, dated Thu 05/02/19 1:39pm.



Portal Message Templates

The screenshot shows a menu with the following items: Configuration, Window, Help, Auto-Notes, Billing, Clinical Alerts, Diagnoses, Documents, Growth Charts, Immunizations, Labs, Patient Portal (highlighted with a black box), Patient Visit Summary, Protocols, Summary of Care Record, Visit Reasons, and Visit Statuses.



Portal Message Templates

✕ Patient Portal Configuration

Configuration **Messaging Templates**

Patient Portal Configuration



Portal Message Templates

✕ Patient Portal Configuration

Configuration Messaging Templates

Secure Messaging Templates

Subject	Display in Portal
Appointment Request	✓
Medication Refill Request	✓
Referral Request	✓
Request	✓



Portal Message Templates

Configuration Messaging Templates

Secure Messaging Templates - Edit

Subject: Display in Portal

Assign incoming portal messages from this template to:

Build Template

Appointment Provider

Allows one selection from a dropdown list of providers (list includes option "Any Provider").

Appointment Location

Allows one selection from a dropdown list of scheduling locations (list includes option "Any Location").

Input box - small

Allows input of one line of text. Recommended when a single word or short answer is desired.

Appointment Date

Displays text "On or after" and allows selection of a single 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)

