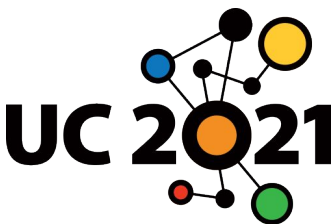


# Client Feedback Session: Form Letter Configuration

Erin Auer, Dan Gillette, Bastien Gliech,  
Tim Proctor, Kayla Robinson  
Moderator: Sarah Gliech



# Welcome!

Miss a UC course you wanted to see? Don't worry!

- All courses will be recorded
- Available on Socio for one year
- Having technical difficulties? Please email [ucsupport@pcc.com](mailto:ucsupport@pcc.com) for help



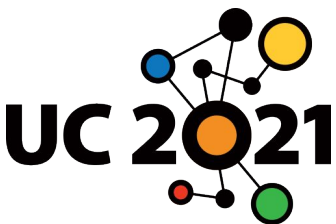
- Fun and Games on Socio
  - “Challenge” codes will appear during a course
  - Enter codes in UC Challenges tab to earn points
  - Check the scoreboard and try to win a daily prize
- This session’s challenge code:

**CLIENTLETTERS**



# Session Goals

1. Learn about the upcoming form letter configuration tool
2. Ask questions
3. Give feedback



# We encourage participation as we go - no need to hold on to questions or feedback.

Everyone has been muted upon entry to reduce distractions.

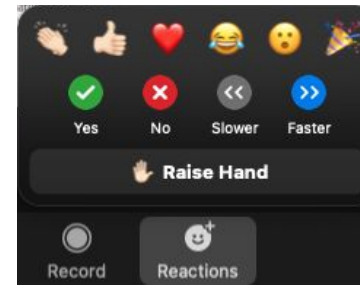


Please use the “Raise Hand” feature to let us know you’d like to be unmuted. Depending on your Zoom version, you may access the “Raise Hand” feature in one of two ways:

**At the bottom of the screen, click Participants to reveal a right-side pane containing the “Raise Hand” button.**



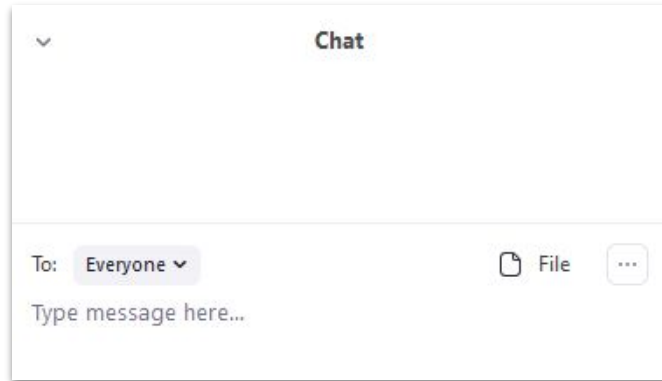
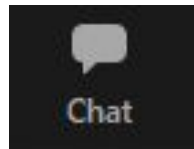
**At the bottom of the screen, click Reactions to reveal a pop-up containing the “Raise Hand” button.**



# We encourage participation as we go - no need to hold on to questions or feedback.

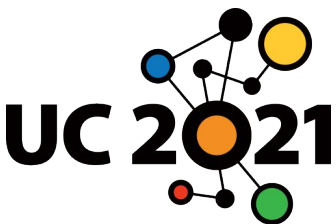
Otherwise, feel free to use the chat feature. Questions and feedback posted in the Zoom chat will be read aloud by the moderator for the presenter to answer.

**At the bottom of the screen, click Chat to reveal a right-side pane containing the chat feature.**



## Base Form Letter Configuration

9.1 Release - Fall 2021		Future Releases in 2022	
Pilot new form letter configuration tool		Go live with new PCC EHR form letters	
Basic Input	Advanced Input	More Advanced Input	Output
<ul style="list-style-type: none"> <li>• Manage form letters</li> <li>• Create a simple form letter                             <ul style="list-style-type: none"> <li>- 8.5x11</li> <li>- Default fonts</li> </ul> </li> <li>• Save a form letter</li> <li>• Delete a form letter</li> <li>• Edit a form letter</li> <li>• Clone a form letter</li> </ul>	<ul style="list-style-type: none"> <li>• Add variables to form letters                             <ul style="list-style-type: none"> <li>- Simple variables</li> <li>- Decision variables</li> <li>- Encounter-based variables</li> </ul> </li> <li>• Configure variable formats</li> <li>• Allow Support to import PDFs</li> </ul>	<ul style="list-style-type: none"> <li>• Any advanced input functionality we aren't able to complete by Fall 2021</li> <li>• Define margins</li> <li>• Check spelling</li> <li>• Import additional fonts</li> <li>• Insert placeholders for answers to questions</li> <li>• Add multi-line variables to form letters</li> <li>• Insert images</li> <li>• Include provider signatures on form letters</li> </ul>	<ul style="list-style-type: none"> <li>• View new form letters within forms component in PCC EHR</li> <li>• Preview form letters</li> <li>• Input pre-generation data (answer questions, select encounter, etc.)</li> <li>• Generate new form letters in PCC EHR</li> </ul>



## Possible Future Enhancements to Form Letters

Management	Additional Input	Additional Output	Additional Forms
<ul style="list-style-type: none"> <li>• Configure form letters for each Care Center</li> <li>• Organize form letters into categories</li> </ul>	<ul style="list-style-type: none"> <li>• Create one-time form letters</li> <li>• Insert headers/footers</li> <li>• Create form letters with additional page sizes                             <ul style="list-style-type: none"> <li>- Zoom control</li> </ul> </li> <li>• Add more variables to form letters:                             <ul style="list-style-type: none"> <li>- Chart components</li> <li>- Other information being tracked in PCC EHR</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Edit a form letter after it's been generated</li> <li>• Generate a batch of form letters</li> <li>• Generate visit forms for one appointment, or all appointments in a day</li> </ul>	<ul style="list-style-type: none"> <li>• Immunization records</li> <li>• Lab Requisition forms</li> <li>• Radiology Requisition form</li> <li>• Default forms</li> </ul>





# Session Takeaways

1. If you'd like to pilot the new forms configuration tool with the 9.1 release, let us know!
2. If you have any additional questions and/or feedback, let us know!
3. Email [erin@pcc.com](mailto:erin@pcc.com) with any follow-up.



# Socio Challenge Code

“CLIENTLETTERS”

## Survey Link (posted in chat)

<https://forms.gle/ZTFePmVHACdee8Tz7>



# Later Viewing

This and all other UC2021 course recordings will be available for later viewing through Socio

