

Forms with Benefits

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Code: LETSTALKABOUTFORMS



Team Introductions

Bastien - Developer

Kayla - Business Analyst

Bryan - Beta Coordinator

Sarah - Educational Content

Dan - Designer

Tamsin - Quality Assurance

Erin - Support Representative

Tim - Product Owner



Participant Introductions

A quick **slido** to learn who you are!

Go to **slido.com** on your computer or mobile device and enter code **9849 219**, or scan this QR code:



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What is your role?

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Did your practice pilot new forms configuration?

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What does "form" mean to you?

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Session Goals

We hope you leave today understanding:

1. What the new forms tool can offer right now (9.4)
2. The long term vision for the new forms tool (9.5 and on)
3. When may be the right time for your practice to switch (now or later) - and what's involved in making the switch



What Questions Do You Have?

Questions posted in Socio will be read aloud by moderator for the presenter to answer. Please post your questions in Socio.



What came with 9.1?

- New forms configuration tool pilot test
 - Early access to give feedback
 - Creating standard forms in the new editor
 - Introduction to variables
- No form generation capabilities



Read about 9.1 forms functionality on Learn:
[https://learn.pcc.com/help/pcc-9-1-release/#Pilot_Test
_Create_and_Manage_Patient_Forms_in_PCC_EHR](https://learn.pcc.com/help/pcc-9-1-release/#Pilot_Test_Create_and_Manage_Patient_Forms_in_PCC_EHR)

What's coming with 9.4?

- Generation of forms from a patient's chart
- Additional Features
 - Enhanced Signature and Encounter Capability for PDF forms
 - Preview
 - Response Variables



Read about 9.4 forms functionality on Learn:
<https://learn.pcc.com/help/pcc-9-4-release/#Create and Manage Forms in PCC EHR>

Who should migrate with 9.4?

PCC Support can help you to determine the right time for you to migrate based on the forms you are currently using. Not all existing forms are supported by the new functionality at this time.

***Please note that there is a migration effort involved with switching to the new tool.**



Read about the forms migration process on Learn:
<https://learn.pcc.com/help/forms-migration/>



What's coming with 9.5?

- 9.5 Sneak Peak
 - Provider Signature Management
 - New Functionality for Standard Forms
 - Practice Header
 - Images
 - Signatures



What's coming with 9.5?

Practice Header with Images

PCC Pediatric
EHR Solutions

practice header

Practice Name

Practice Address - Line 1

Practice Address - City

Practice Address - State

Practice Address - Zip

Home Account Full Name

Home Account Address - Line 1

Home Account Address - Line 2

Home Account Address - City

Home Account Address - State

Home Account Address - Zip



Bonus Code: FRENCHTOAST




What's coming with 9.5?

Provider Signature Management

Forms Signatures

Signature Images

Provider	Signature
Elizabeth Casey, MD	✓
Beverly Crusher, MD	
James Davidson, MD	✓
Katherine Gomez, MD	✓
Fred Jones, MD	
Leonard McCoy, MD	✓
Mark Williams, MD	✓



The screenshot shows a software interface for managing provider signatures. It features a tabbed menu with 'Forms' and 'Signatures'. Under the 'Signatures' tab, there is a section titled 'Signature Images' containing a table with two columns: 'Provider' and 'Signature'. The table lists seven providers, with checkmarks indicating that signature images are present for Elizabeth Casey, MD, James Davidson, MD, Katherine Gomez, MD, Leonard McCoy, MD, and Mark Williams, MD. To the right of the table is a large, light gray rectangular area. Within this area, a small white box contains a handwritten signature that reads 'e. casey md'.



What's coming with 9.5?

Signatures for Standard Forms

Signature - Image
Image of the provider's signature who is selected as the form signer.

Default Provider
Primary Care Provider

Generate Form - Sports Participation

Last Tetanus shot was on 08/14/20

Additional Notes:

e. casey md
Elizabeth Casey, MD

Signature
Elizabeth Casey, MD (PCP)

Height from Last Well Visit
|

Weight from Last Well Visit

Blood Pressure from Last Well Visit



What's coming in the future?

- Forms Roadmap
 - More forms features
 - Eventually forms will meet all clients' needs
- Help us with another **slido**

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Rank these features in order of priority to you (highest priority on top).

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What other features are you looking to see? (Go to ideas)



Session Takeaways

1. With 9.4, the new forms solution will be ready for some clients to make the switch
2. Continued development of new forms functionality will enable more clients to switch
3. Eventually, new forms will be ready for everyone



Session Takeaways

Any further questions or comments to share?

OR

If you're interested in taking part in a client panel to help steer future forms development

Email us at: DT6@pcc.com



Later Viewing

This and all other UC2022 course recordings will be available for later viewing through Socio and [PCC's YouTube Channel](#)

