Forms with Benefits

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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



Go to slido.com on your computer or mobile device and

enter code **9849 219**, or scan this QR code:









What is your role?



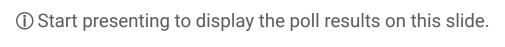
① Start presenting to display the poll results on this slide.





Did your practice pilot new forms configuration?









What does "form" mean to you?



(i) Start presenting to display the poll results on this slide.



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





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





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.



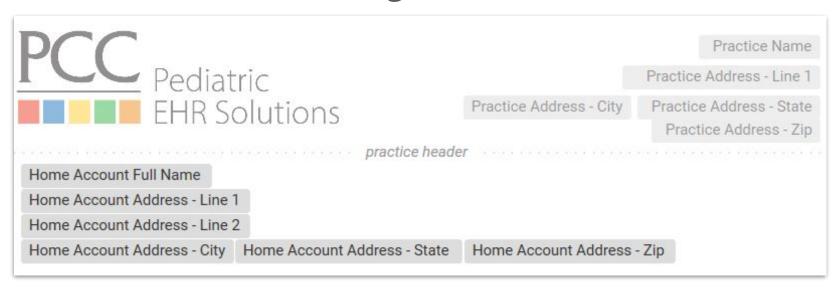


- 9.5 Sneak Peak
 - Provider Signature Management
 - New Functionality for Standard Forms
 - Practice Header
 - Images
 - Signatures





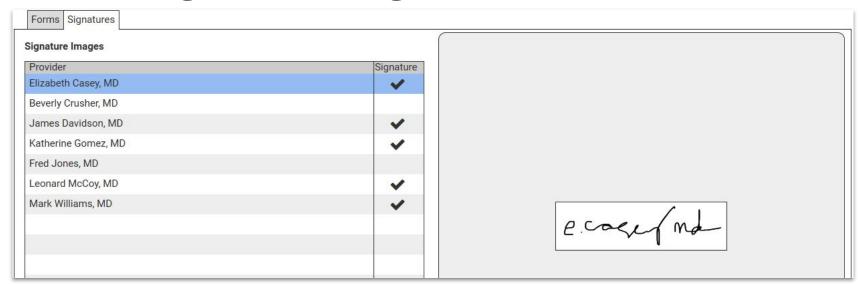
Practice Header with Images







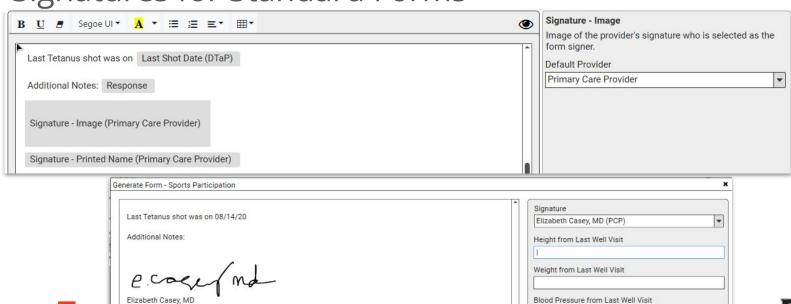
Provider Signature Management







Signatures for Standard Forms







What's coming in the future?

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

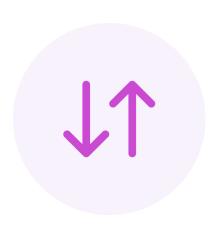
Go to **slido.com** on your computer or mobile device and

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







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



