

# Get the Most Out Of the CHADIS and PCC EHR Integration

**Sasha Pavlovic - PCC**

Interoperability Implementation

**Sarah Bunning - PCC**

Application Specialist



# Session Goals

1. Provide an understanding of Best Practices for preparation and configuration of the CHADIS/PCC integration
2. Introduce PCC Reports which can maximize patient and family participation while reducing steps for staff
3. Familiarize attendees with the benefits of integration





# Configuration - Visit Reasons

- Review and Configure Visit Reasons
  - Do you have specific visit reasons needed for the integration?
  - Have you requested the needed CHADIS visit types?
  - Are they all mapped appropriately?



# Configuration - Orders

- Review and Configure Screening Orders
  - Do you have appropriate Screening orders for questionnaires?
  - Have you linked CHADIS questionnaires to Screening orders?
  - Are Screening orders mapped to billing codes?



# Configuration - CHADIS

- Work with CHADIS to select and configure questionnaires
  - Patient age-ranges per questionnaire
  - Relationship to patient per questionnaire
  - Minimum days between assignments
  - Teen based questionnaires



# Why weren't CHADIS Questionnaires assigned?



Yes, this is in fact the number ONE asked question related to the CHADIS Integration!



# Could It Be... No Portal Account?

**PCC EHR**  
File Edit Reports Tools Configuration Window Help

**Aleksandra Jones PCC# 2252**

Medical Summary  
Demographics  
**Forms**  
Patient Demographics  
Communication Preferences  
Account Demographics  
Personal Contacts  
Policies  
Siblings  
Patient Portal Users  
Account Balances

History  
PCC eRx

**Demographics** Aleksandra Jones 2 months 04/22/22 F

**Account Demographics**

**Home and Billing Account**  
Edward Jones (Account # 72)

**Address**  
785 W High Street  
Bristol, VT 05443

**Phone**  
Home Phone: 802-555-0172  
Work Phone: 802-555-0153  
Cell Phone: 802-555-0122  
Emg Phone: 802-555-0165

**Email:**

**Account Information**  
Account Flags:  
EMG Contact:  
EMG Phone #:  
Alt Last Name:  
Mother Employer:  
Father Employer:  
Pharmacy #:

**Recent Financial History**  
Last Service: 05/02/22  
Last Bill Sent:  
Last Pers. Pmt: 04/06/19  
Last Ins. Pmt:  
Hold Bill Until:  
Budget Amt:

**Personal Contacts**  
Personal Contacts have not been entered.

**Policies** Display: Active

Insurance	Copay	Certificate	Group	Start	End	Status
1. HealthyKids HMO \$5/25copay	\$5.00	QZC190647831	Jon782	12/24/19		Active

**Siblings**  
None

**Patient Portal Users**  
This patient has no associated portal users.

**Account Balances**  
Edward Jones (Account # 72)

Aging	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	0.00	0.00	0.00

Create Visit Edit Add Phone Note Add Portal Message Close Save Save + Exit





# Could It Be... No Relationship?

[Add Portal User](#)

[Manage Portal User](#) Manage Portal User: Sarah Bunning [Back](#)

[Edit Portal User](#) [Delete Portal User](#) [Reset Password](#)

Portal User Name: Sarah Bunning      Last Login: 06/20/22 2:21pm  
Sign In: sarah@pcc.com      Identity Verification: Verified  
Portal Notifications: sarah@pcc.com      Password: \*\*\*\*\*  
Balances: Steven Barlet (Account #743)      Unread Messages: 0  
Unviewed Documents: 0

**Patients connected to this portal user** [Add Siblings](#) [Add Patients](#)

Name	Hide at age 18	DOB	Age	PCC #	Portal User's Relationship to Patient	Custodian
<a href="#">remove</a> Mark Barlet	<a href="#">Yes</a>	12/04/13	8y 6m	1609	<input type="text" value="select a relationship"/>	Steven Barlet

**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.

- Steven Barlet  
Patients: Mark Barlet, *Nicholas Barlet, Dalton Barlet*
- Do not display balance

PCC Pediatric Test Associates

Portal users can sign in at: <https://ehrc4p.pcc.com/portal>



# Could It Be... Min/Max Age Range?

## New Patient Well Check Visit

	Questionnaire	Min Age	Max Age	Relationship
✖ ⬆ ⬇ 📄	#905 Initial Patient History ⓘ	0 years	25 years	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#905 Initial Patient History ⓘ	18 years	25 years	Self/Patient (
✖ ⬆ ⬇ 📄	#201 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 6 months ⓘ	5 months	7.5 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#205 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 9 months ⓘ	7.5 months	10.5 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#207 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 12 months ⓘ	10.5 months	13 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#208 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 14 months ⓘ	13 months	15 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#210 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 18 months ⓘ	17 months	22 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#213 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 24 months ⓘ	22 months	2 years 4 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#216 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 30 months ⓘ	2 years 4 months	2 years 10 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#218 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 36 months ⓘ	2 years 10 months	3 years 8 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#220 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 48 months ⓘ	3 years 8 months	4 years 9 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#222 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 60 months ⓘ	4 years 9 months	5 years 6 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#362 Modified Checklist for Autism in Toddlers Revised ⓘ			Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#660 Edinburgh Postnatal Depression Scale ⓘ	0 years	6 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#504 Lead Questionnaire - TX - No Opt-out ⓘ	11 months	6 years	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#237 CRAFFT+N Questionnaire Self Administered Version 2.1 ⓘ	12 years 11 months	19 years	Any Self (
✖ ⬆ ⬇ 📄	#129 EPSDT-Anemia Screen ⓘ	8 months	3 years	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#794 Patient Health Questionnaire-9 Modified ⓘ	10 years 10 months	14 years	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#794 Patient Health Questionnaire-9 Modified ⓘ	10 years 10 months	19 years	Self/Patient (
✖ ⬆ ⬇ 📄	#237 CRAFFT+N Questionnaire Self Administered Version 2.1 ⓘ	13 years	14 years	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#200 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 4 months ⓘ	3 months	5 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#209 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 16 months ⓘ	15 months	17 months	Any Primary Caregivers (
✖ ⬆ ⬇ 📄	#199 Ages & Stages Questionnaires®, Third Edition (ASQ®-3): 2 months ⓘ	1.5 months	3 months	Any Primary Caregivers (



# Could It Be... Cancel vs. Reschedule?


Appointment History ◀ 1 - 6 of 6 ▶

Date	Reason	Provider	Location	Removal Reason
07/01/22 9:00am Fri	8yr - 9yr Well Visit	Beverly Crusher, MD	Winooski Pediatrics	
06/07/22 8:45pm Tue	8yr - 9yr Well Visit	Mark Williams, MD	Burlington Peds - New North End	Canceled by Patient
05/15/22 12:30pm Sun	Sick Call	Mark Williams, MD	Burlington Peds - New North End	
04/22/22 4:30pm Fri	Sick Call	Mark Williams, MD	Burlington Peds - New North End	
12/28/21 4:15pm Tue	Flu Vaccine		Burlington Peds - Flu Clinic	
05/11/21 8:15pm Tue	Immunizations Only		Burlington Peds - Flu Clinic	

▼ Details Remove Reschedule Edit

**Appt Note:**

**Scheduling Details:** Rescheduled by PCC PCC on 06/20/22 at 5:37pm (Changed from - 06/27/22 at 8:45am Mon, 8yr - 9yr Well Visit)  
Scheduled by PCC PCC on 06/20/22 at 5:29pm





# No Patient Portal = No Questionnaires!!

- Review Patient Portal Reports
  - What's my patient portal adoption look like?
  - Identify upcoming appointments without a linked portal account
  - Identify teens without their own portal account

## CHADIS Questionnaires

You have no questionnaires to complete

[CHADIS Home](#)



# Patients with Portal Users

Click on the Reports Menu  
-->Report Library  
-->Patient Portal  
-->Patients with Portal Users



Report Library

### Patients with Portal Users

Find all patients who are linked to Patient Portal users.

**Portal Status:** Without Portal User  
**Exclude by Patient Flag:** Deceased, Inactive, Transferred

Columns: 3 Displayed      Group By: None      Search Filter:

Patient Name	Patient PCC #	Linked Portal User(s)
Achenbach, Gillian K.	2854	
Achey D.D.S., Diane "Anthony" Mae	399	
Acker P.C., Christopher R.	547	
Acker, Jason	1178	
Acker, Kristi	3000	
Acker, Lauren	2634	
Acord Phd., Christina L	272	
Acord Phd., Daniel "Tr" Beth	168	

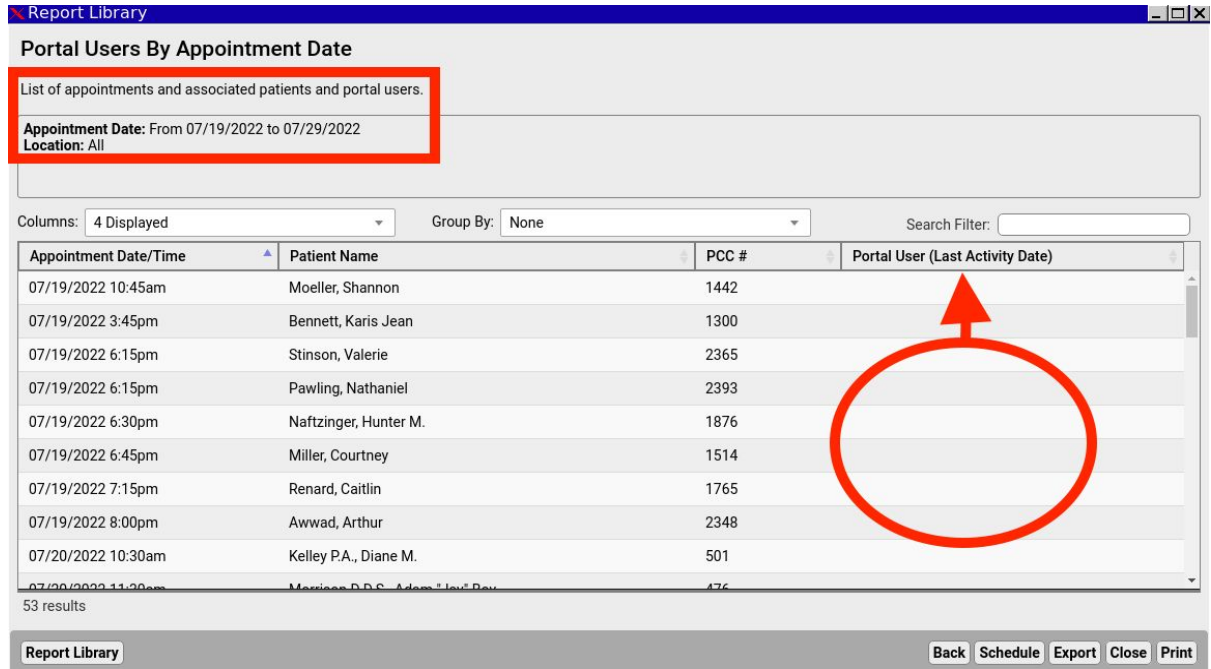
2,748 results

Report Library      Back      Schedule      Export      Close      Print

A red arrow points to the 'Linked Portal User(s)' column header. A red circle highlights the empty cells in that column for the first seven rows of the table.

# Portal Users by Appointment Date

Click on the Reports Menu  
-->Report Library  
-->Patient Portal  
-->Portal Users By  
Appointment Date



Report Library

### Portal Users By Appointment Date

List of appointments and associated patients and portal users.

Appointment Date: From 07/19/2022 to 07/29/2022  
Location: All

Columns: 4 Displayed    Group By: None    Search Filter:

Appointment Date/Time	Patient Name	PCC #	Portal User (Last Activity Date)
07/19/2022 10:45am	Moeller, Shannon	1442	
07/19/2022 3:45pm	Bennett, Karis Jean	1300	
07/19/2022 6:15pm	Stinson, Valerie	2365	
07/19/2022 6:15pm	Pawling, Nathaniel	2393	
07/19/2022 6:30pm	Naftzinger, Hunter M.	1876	
07/19/2022 6:45pm	Miller, Courtney	1514	
07/19/2022 7:15pm	Renard, Caitlin	1765	
07/19/2022 8:00pm	Awwad, Arthur	2348	
07/20/2022 10:30am	Kelley P.A., Diane M.	501	
07/20/2022 11:20am	Merrison, D.C., Adam "Jay" Ray	476	

53 results

Report Library    Back    Schedule    Export    Close    Print



# Portal Users by Relationship

Click on the Reports Menu  
->Report Library  
->Patient Portal  
->Portal Users By Relationship



Report Library Zeus

### Portal Users by Relationship

Find portal users by their relationship to linked patients.

**Edit Categories** Appointment, Patient Portal

**Portal User Status**  
With Portal User, Without Portal User

**Portal User Relationship to Patient**  
**Edit** All Portal User Relationship to Patients

**Patient Age**  
From 13 yrs 0 mos through 21 yrs 11 mos  
06/23/2000 through 06/22/2009

**Age-Based Privacy**  
All

**Appointment Date**  
Custom Dates From 07/19/2022 to 07/29/2022

**Appointment Location**  
All Appointment Locations

**CHADIS Visit Type**  
All CHADIS Visit Types

Back Schedule Customize Report Close Generate





# What's Next for PCC/CHADIS?

1. Reduce the need for practices to manually add patients to CHADIS **(9.4)**
2. Update pocketPCC to include CHADIS questionnaire results **(9.4)**
3. Ability to move CHADIS results to a different encounter **(9.5)**



# Session Takeaways

1. Workflow and configuration Best Practices to consider with the PCC/CHADIS Integration
2. Reports for maximizing automation as well as patient and family engagement
3. Understanding the benefits of integration for your practice, your patients, and their families



# What Questions Do You Have?

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



# References

Configure CHADIS in PCC EHR

<https://learn.pcc.com/help/configure-chadis-in-pcc-ehr/>

CHADIS Questionnaires

<https://www.chadis.com>



# Later Viewing

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

