

BACK TO THE FUTURE

What's New/What's Next

Back - Review highlights since UC 2022!

Future - Review what's coming up in 2023!

Relay related offerings at UC 2023

Systems Team

Scott Ploof

What's New

Three updates since UC 2022, one in beta!

9.4 - August 2022

9.5 - January 2023

9.6 - April 2023 (infrastructure update)

9.7 - July 2024 (in beta)

What's Next

- New delivery tools - bug fixes, and “between release updates”, delivered faster!
- Automated updates of immunization information from the CDC.

Care for Patients

Jim Leahy

What We Do

**Pediatric-Friendly
Software**

**Meaningful
Interactions
Between Practices
& Patients**

**Simplifying
Processes & Tools**

**Patient
Engagement**

Training & Support

What's New Since Last UC?

Patient Portal Messaging

- Practices can configure the "Other" message template

| Message Reason | Display in Portal |
|---------------------------|-------------------|
| Appointment Request | ✓ |
| Medication Refill Request | ✓ |
| Other | ✓ |
| Referral Request | ✓ |
| School Forms Request | ✓ |

What's New Since Last UC?

Patient Portal Messaging

- Practices can configure the "Other" message template

The screenshot shows a configuration window titled "Portal Messaging Templates - Edit". It includes a "Message Reason" dropdown menu set to "Other", a checked "Display in Portal" checkbox, and an "Assign incoming portal messages from this template to:" dropdown menu set to "Unassigned". Below this is a "Build Template" section with a dropdown menu and an "Add" button. A scrollable list contains a "Subject" entry with a checked checkbox and a description: "Display a single-line input box labeled 'Subject' at the top of the form. The Portal User's Subject replaces the Message Reason that is displayed on the Messaging Queue and in Patient Portal Message History." At the bottom right are "Cancel", "Preview", and "Save" buttons.

What's New Since Last UC?

Patient Portal Messaging


- Ability to share documents for purposes of receiving agreement

[Back](#) My Kid's Chart

Andrew Wilson
Sex: Male
Birthdate: 10/14/20
Last Physical: None


Message Reason: Privacy Policy Agreement

Privacy Policy Agreement

 [Privacy Policy](#)

[Sign Document](#)

Payment Agreement Form

 [Payment Agreement](#)

[Sign Document](#)

[Send](#)

[Attach a Photo or PDF](#)

What's New Since Last UC?

Patient Portal Messaging

- Ability to share documents for purposes of receiving agreement

Portal Message Andrew Wilson 1 yr, 7 mos 10/14/20 M

Encounter Details
Date of Service: 05/16/22
Provider of Service:
Encounter Location:

Portal Messages



Subject: Privacy Policy Agreement TO:

Date: 05/16/22 4:45pm
From: Daniel Wilson

Privacy Policy Agreement
Signed by portal user Daniel Wilson 05/16/22 4:45pm

Payment Agreement Form
Signed by portal user Daniel Wilson 05/16/22 4:45pm

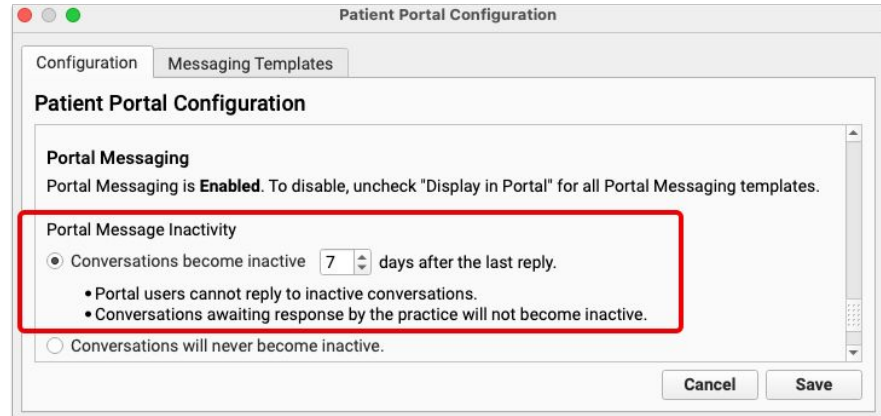
Attachments

| | | |
|---|---|--|
|  | Title: Privacy Policy Category: General Portal Messages: 05/16/22 - Privacy Policy Agreement Signed by portal user: Daniel Wilson 05/16/22 4:45pm Last Modified: 05/16/22 4:45pm Pages: 1 | <input type="button" value="View Document"/> |
|  | Title: Payment Agreement Category: General Portal Messages: 05/16/22 - Privacy Policy Agreement Signed by portal user: Daniel Wilson 05/16/22 4:45pm Last Modified: 05/16/22 4:45pm Pages: 1 | <input type="button" value="View Document"/> |

What's New Since Last UC?

Patient Portal Messaging

- Prevent replies to inactive portal messages



What's New Since Last UC?

Patient Portal Messaging

- Prevent replies to inactive portal messages

The screenshot displays a patient portal messaging interface. At the top, there is a 'Back' button and the title 'My Kid's Chart'. Below this, a red-bordered box highlights the text 'Conversation is Inactive'. A yellow callout box with a black border and an arrow pointing to the red box contains the text 'Portal users cannot reply to an inactive conversation'. Below the callout is a blue 'Create Message' button. The main content area contains the following text: 'Create Message to start a new conversation.', 'Andrew Wilson', 'Sex: Male', 'Birthdate: 10/14/12', 'Last Physical: None', 'Subject: Andrew's 5/28 appointment', 'Wed 05/18/22 10:47am', and a message from 'Leonard McCoy, M.D.' with the text: 'I'm sure there'll be enough time to discuss allergy treatments. I'll make a note to ensure we get to it.'

What's New Since Last UC?

Patient Portal Messaging

- Prevent replies to inactive portal messages

Portal Messages

Subject: Andrew's 5/28 appointment TO:

Date: 05/18/22 10:46am
From: Daniel Wilson

Good morning,
At Andrew's May 28th appointment, I'd like to discuss allergy treatments, if there's time enough.

Date: 05/18/22 10:47am
From: Leonard McCoy, M.D.

I'm sure there'll be enough time to discuss allergy treatments. I'll make a note to ensure we get to it.

Status: Read by Daniel Wilson on 05/18/22 10:48am

Add Reply Conversation is inactive as of 05/19/22. Portal user cannot reply. Add Reply will reactivate this conversation.

EHR users can always reply to an inactive conversation

What's New Since Last UC?

CHADIS

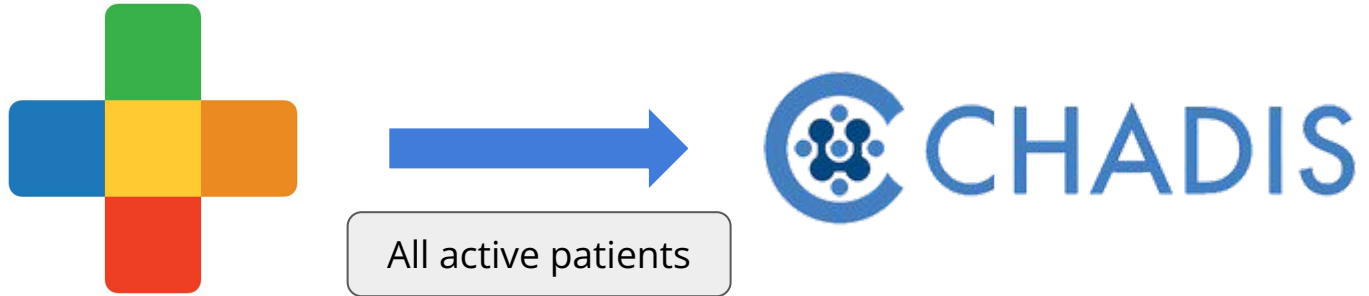
- PocketPCC displays CHADIS questionnaire results

The screenshot shows the PocketPCC mobile application interface for a visit on 05/30/22. The top navigation bar includes a menu icon, the text 'pocketPCC', and the title 'Visit - 05/30/22'. Below this is a section for 'Appointment Details' containing the following information: Visit: Sick - Bright Futures, Appt Time: 05/30/22 3:30pm, Arrival Time: **Not Yet Arrived**, Visit Reason: Well Visit, Patient Age: 7y 2m, Appt Location: Lake Champlain Pediatrics, and Appt Provider: Alfred Woodward, M.D. A section titled 'Sick - Bright Futures' follows. Below that is a 'Policies' section with a gear icon and the status 'Active'. The 'Intake' and 'Screening' sections are also visible. The 'Screening' section is highlighted with a red box and contains a sub-section 'Screening - Goals & Priorities' with the text 'Ordered 05/25/22'. Below this, a grey box displays 'CHADIS Result: Visit Priorities' from Amanda Smith (other-primary-caregiver:) on 05/25/22, with a bullet point indicating 'Parent Concern: General well being'. At the bottom, there is a 'Tasks' section showing '1 (0 Completed)' and a 'Complete Task' button with a due date of 05/30/22.

What's New Since Last UC?

CHADIS

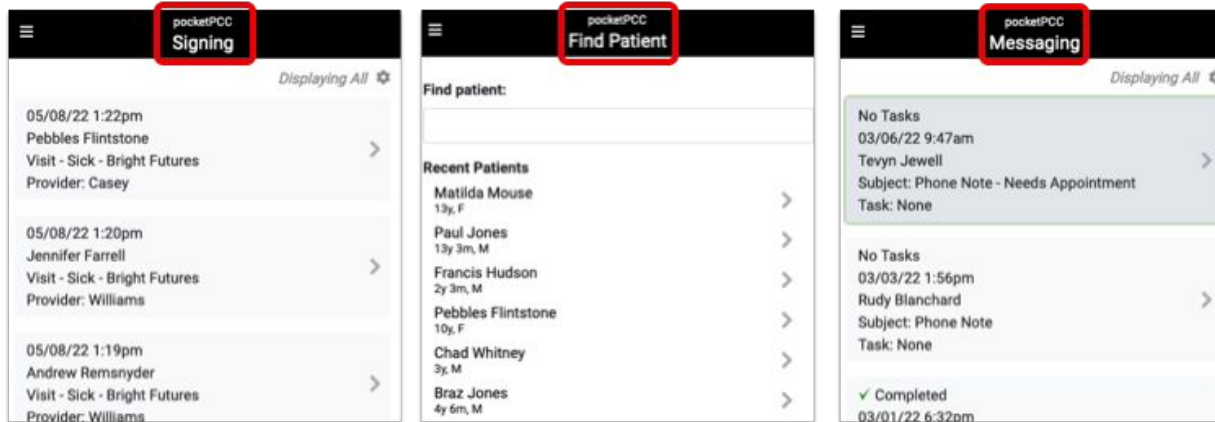
- Improvements to patient syncing



What's New Since Last UC?

PocketPCC

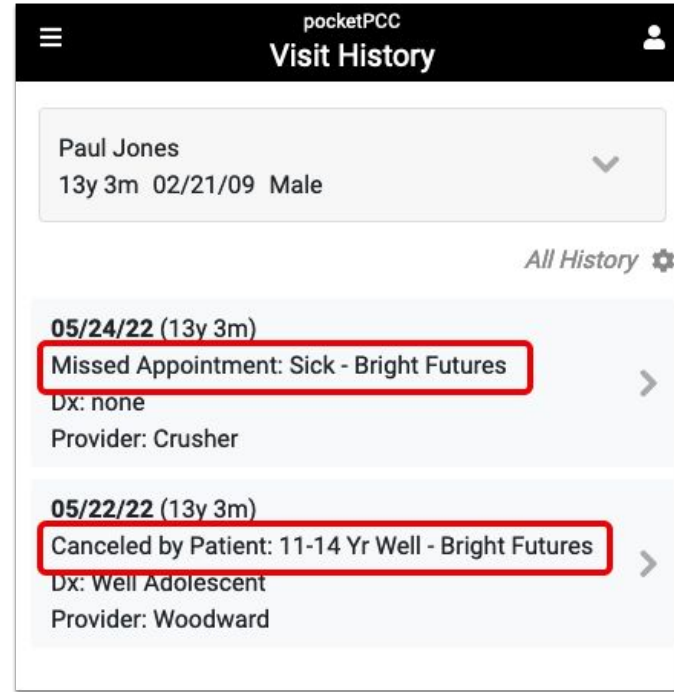
- Titles in pocketPCC screens



What's New Since Last UC?

PocketPCC

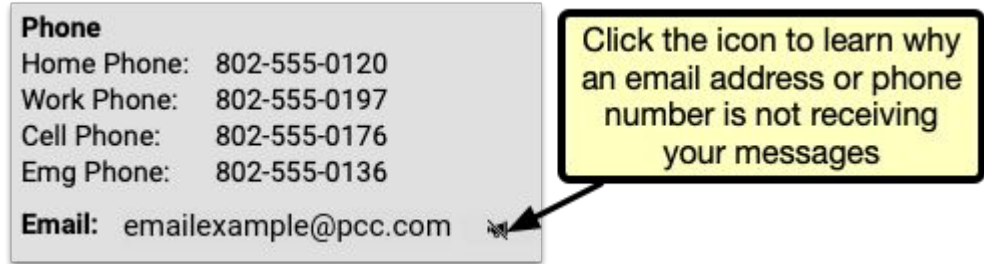
- Identify missed and canceled appointments in the visit history



What's New Since Last UC?


Patient Communication

- Improved management of unsubscribed/invalid emails and phone numbers



The image shows a screenshot of a patient's contact information. It includes a 'Phone' section with four entries: Home Phone (802-555-0120), Work Phone (802-555-0197), Cell Phone (802-555-0176), and Emg Phone (802-555-0136). Below this is an 'Email' section with the address 'emailexample@pcc.com' and a small icon to its right. A yellow callout box with a black border and an arrow pointing to the icon contains the text: 'Click the icon to learn why an email address or phone number is not receiving your messages'.

Phone
Home Phone: 802-555-0120
Work Phone: 802-555-0197
Cell Phone: 802-555-0176
Emg Phone: 802-555-0136

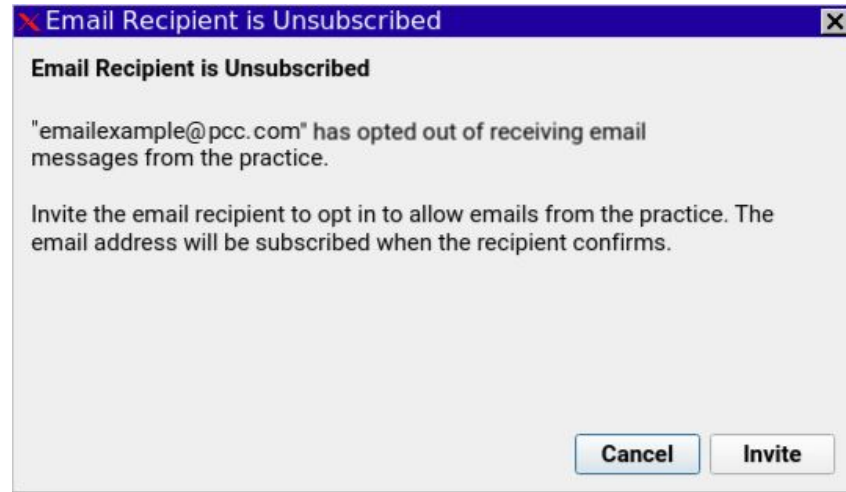
Email: emailexample@pcc.com 

Click the icon to learn why an email address or phone number is not receiving your messages

What's New Since Last UC?

Patient Communication

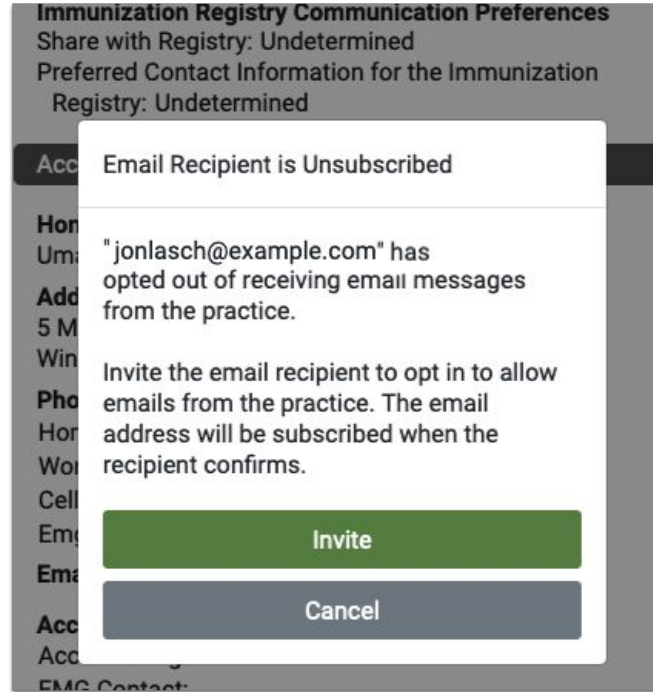
- Improved management of unsubscribed/invalid emails and phone numbers



What's New Since Last UC?

Patient Communication

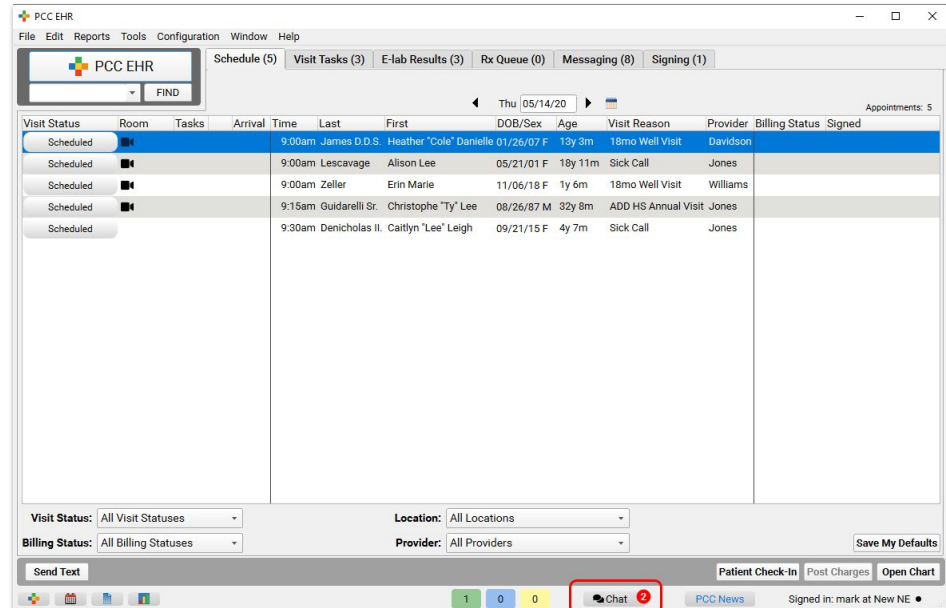
- Improved management of unsubscribed/invalid emails and phone numbers



What's New Since Last UC?

EHR - Other

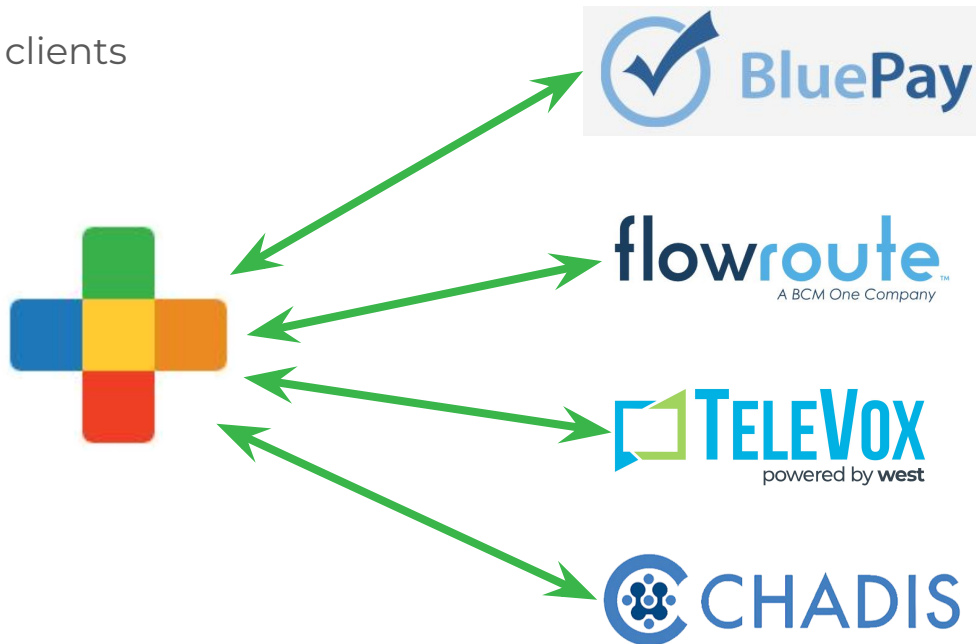
- Faster data refresh in applications like the Appointment Book and PCC Chat



What's New Since Last UC?

Interface Setups

- Portal Payments: 38 clients
- SMS/Broadcast: 36
- Notify: 32
- CHADIS: 39



What Have Clients (You) Been Up To?

Broadcast, Texts, and Emails

- Broadcasts Batches: 23780
- Broadcast SMS Sent: 4,247,262
- Broadcast Emails Sent: 1,588,583
- Total SMS Single Sent: 1,076,698

Patient Notification (notify)

- Voice: 703,390
- SMS: 2,278,652
- Email: 85,598

Portal Payments

- Portal Transactions: 157,412
- Portal Payments: \$12,105,536.81

Data from 7/1/22-7/1/23

What Have Clients (You) Been Up To?

CHADIS screenings

- 933,523 questionnaires completed
- 410,795 encounters with completed CHADIS questionnaires

Across 91 clients live with CHADIS



Data from 7/1/22-7/1/23

What's Next?

Coming in PCC 9.7

What's Next?

Review Chat Logs in PCC EHR

- Track team member communication in PCC EHR's Chat feature.

PCC EHR Audit Log Chat Message Log

Chat Message Log

View messages sent and received in EHR Chat

Reporting Period: 05/30/2023 02:00pm to 05/30/2023 11:59pm

3 EHR Users

Messages: 8 Search Filter:

| Date/Time | Sender | Recipient | Message Text |
|--|--------------------|--------------------|---|
| - Kyle Kendall, RN, Larry Lawrence, RN (2) | | | |
| 05/30/2023 04:22:57pm | Kyle Kendall, RN | Larry Lawrence, RN | What's all that stuff in your trunk? |
| 05/30/2023 04:23:51pm | Larry Lawrence, RN | Kyle Kendall, RN | I have been stealing thousands of dollars worth of office supplies. |
| - Nurses (6) | | | |
| 05/30/2023 04:07:56pm | Marilyn Miller, RN | Nurses | I'm ordering lunch from the deli if anyone wants in. |
| 05/30/2023 04:12:43pm | Casey Findlay, LNA | Nurses | 4:00 is a bit late for me. |
| 05/30/2023 04:14:06pm | Marilyn Miller, RN | Nurses | It's been a very busy day! |
| 05/30/2023 04:18:23pm | Larry Lawrence, RN | Nurses | What's going on in room 2? It looks like a tornado went through there? |
| 05/30/2023 04:19:15pm | Harriet Hudson, RN | Nurses | Sorry, that's on me. I had a time with that kid. I'm headed in there to tidy it up now. |
| 05/30/2023 04:20:11pm | Larry Lawrence, RN | Nurses | Someone's on it. |

Back Export Close

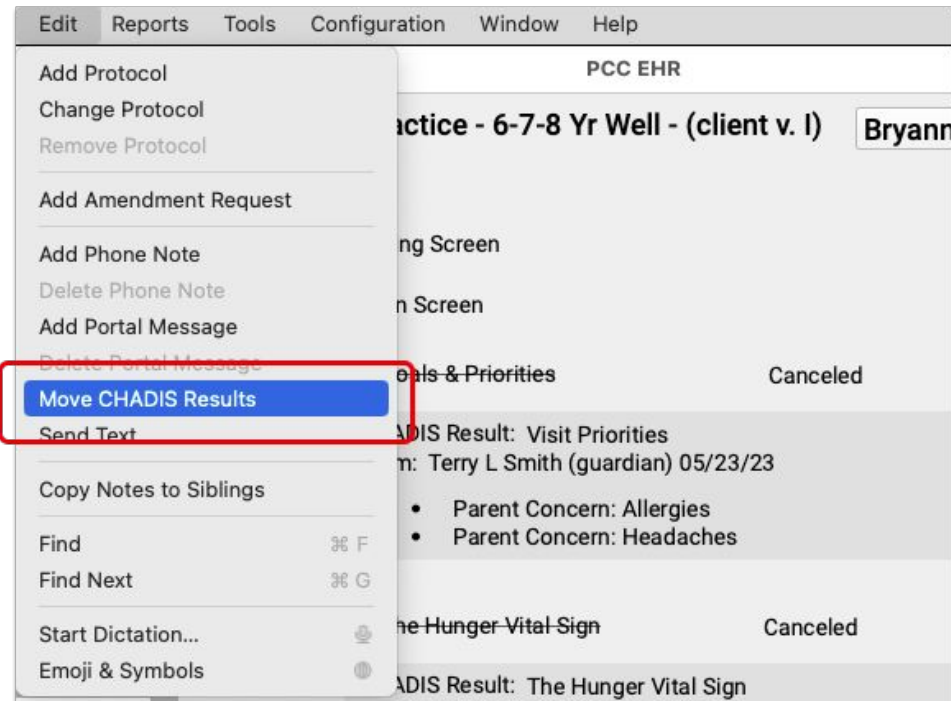
Chat log results include group chats that include one or more of the selected users

Click "Export" to save these results as a .CSV file

What's Next?

Move CHADIS Results to a Different Encounter

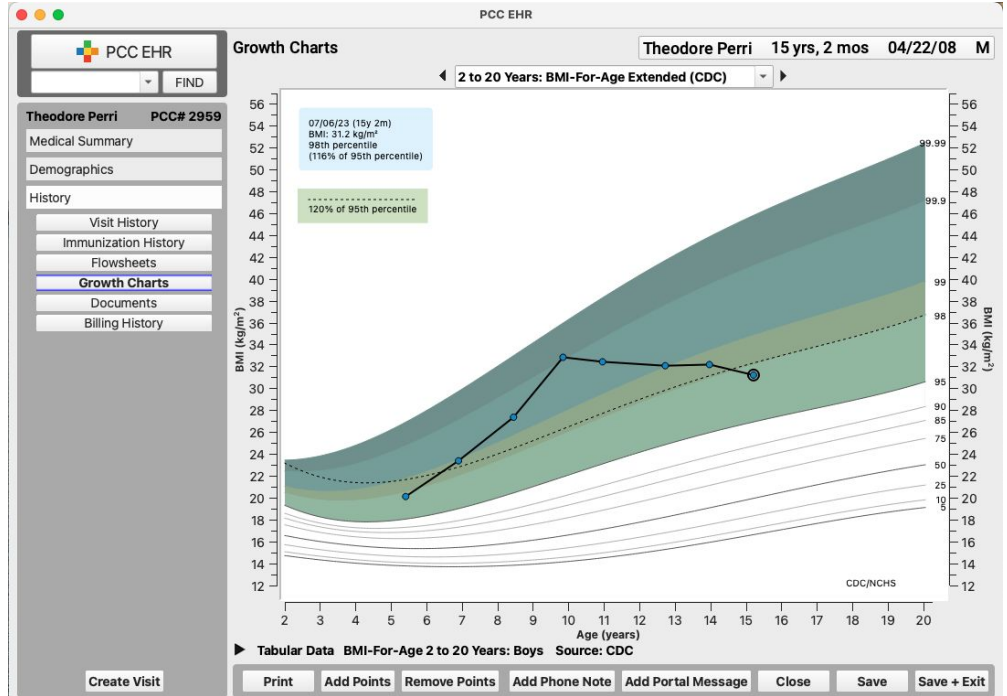
- Useful for missed or canceled appointment with CHADIS results.
- Additionally, you'll be able to delete charted visits with CHADIS results.



What's Next?

New CDC 2 to 20 Years Extended BMI-For-Age Growth Charts

- This extended chart displays when a BMI is greater than the 95th percentile.
- This option is selectable from the drop-down when the percentile exceeds 95%.
- Charts are color-coded by sex.



What's Next?

Distinguish Between Past and Future Encounters in the Visit History

- A line will be visible between past and future dates when importing documents or reviewing a patient's Visit History.



The screenshot shows a 'Visit History Index' interface. At the top, there is a 'Find Filter:' input field, a 'Find' button, and a 'Display:' dropdown menu set to 'All History'. Below this is a table with columns: 'Tasks', 'Date', 'Age', 'Protocols', 'Details', 'Provider', and 'Docs'. A red rectangular box highlights the first row of the table, which contains the date '10/13/23', age '11y', protocols 'Anxiety/Depression', details 'Dx: none', and provider 'Crusher'. The second row, dated '10/17/22', is also partially highlighted by the red box. The table lists several other visits with dates from 2022, all with 'Dx: none' and 'Williams' as the provider.

| Tasks | Date | Age | Protocols | Details | Provider | Docs |
|-------|----------|-------|--------------------|----------|----------|--------|
| | 10/13/23 | 11y | Anxiety/Depression | Dx: none | Crusher | 1 item |
| | 10/17/22 | 10y | Asthma Control | Dx: none | Williams | |
| | 07/11/22 | 9y 9m | Asthma Control | Dx: none | Williams | |
| | 06/26/22 | 9y 8m | Consult | Dx: none | Williams | |

What's Next?

Connect Patient Portal Accounts to PCC EHR Accounts

- You'll be able to link Portal accounts to Home & Billing accounts in PCC EHR. This is in preparation for our work on Patient Portal Pre-Check-In.

Home and Billing Account Portal User

Add a new portal user for Home and Billing Account Mark Wilson

Portal User: Mark Wilson

Portal Sign-In: 802-555-0183

Portal User's Relationship to Patient: Guardian

Display balance for Home and Billing Account "Mark Wilson"

Cancel Continue

Select a phone number or email address to use as a portal sign-in

Select the user's relationship to the patient



Demographics Dana Wilson 11 mos, 1 wk 06/09/22 F

First Name: Mark
Last Name: Wilson

EMG Contact:
EMG Phone #:
Alt Last Name:
Mother Employer:
Father Employer:
Pharmacy #:

Address
RD 7 Box 006
address 2
Saxtons River VT 05154

Phone
Home Phone: 802-555-0183
Work Phone: 802-555-0109
Cell Phone: 802-555-0194
Emg Phone: 802-555-0104

Recent Financial History
Last Service: 04/23/23
Last Bill Sent: 02/07/19
Last Pers. Pmt: 03/27/20
Last Ins. Pmt: 04/09/20
Hold Bill Until:
Budget Amt: \$

Home and Billing Account's Portal User Unlink Manage

Name: Mark Wilson (Guardian)
Sign In: 802-555-0183
Portal Notifications: 802-555-0183
Balances: Mark Wilson (Account # 336)

Last Login: never
Identity Verification: never
Temporary Password: LB.GFT
Unread Messages: 0
Unviewed Documents: 0

What's Next?

After 9.7

What's Next?

Patient Pre-Check-In

- PCC's Patient Portal will allow patients to update demographics and complete pre-check-in prior to their visit.

The screenshot displays the PCC Patient Portal interface. At the top, there are three navigation buttons: "Sign Out" (dark blue), "My Kid's Chart" (light blue), and "Settings" (white with a blue border). Below these is a welcome message: "Welcome Frank Patterson".

The main content area is divided into two sections:

- Patient Charts:** A blue header bar. Below it is a white box containing the text "Elizabeth Patterson 07/05/21".
- Upcoming Appointments:** A blue header bar. Below it is a white box with a grey header "Mon 07/03/23 2:30pm Elizabeth" and an upward arrow icon. The appointment details are:
 - 2yr Well Visit**
 - Mark Williams, M.D.
 - Burlington Peds - New North EndAt the bottom of this box is an orange button labeled "Elizabeth - Start Pre-Check-In".

What's Next?

Patient Pre-Check-In

- PCC's Patient Portal will allow patients to update demographics and complete pre-check-in prior to their visit.

Pre-Check-In for Elizabeth

Appointment: Monday 07/03/23 2:30pm

2yr Well Visit

Mark Williams, M.D.

Burlington Peds - New North End

▼ Patient Information

Not Confirmed ⓘ

Name: **Elizabeth Patterson**

Nickname:

Birthdate: 07/05/21

Sex: Female

Race: *information requested*

Ethnicity: *information requested*

Language: *information requested*

Edit

Confirm

▼ Billing Account

Not Confirmed ⓘ

Billing Account: **Frank Patterson**

Address: Rd#5 Box 5078

Saint Johnsbury Center, VT 05863

Home Phone: (802) 555-0105

Work Phone: (802) 555-0106

Cell Phone: (802) 555-0193

Emg Phone: (802) 555-0197

Email: *information requested*

Edit

Confirm

Pre-Check-In

Not Ready to Submit

Pre-Check-In is ready to submit when all sections are Confirmed.

Submit

What's Next?

Patient Pre-Check-In

- PCC's Patient Portal will allow patients to update demographics and complete pre-check-in prior to their visit.

The screenshot displays the PCC EHR Patient Check-In interface. The window title is 'PCC EHR' and the menu bar includes 'File', 'Edit', 'Reports', 'Tools', 'Configuration', 'Window', and 'Help'. The patient information at the top right is 'Elizabeth Patterson', '1 yr, 11 mos', and '07/05/21'. The left sidebar shows a navigation menu with options like 'Appointment Details', 'Patient Pre-Check-In', 'Patient Demographics', 'Communication Preferences', 'Patient Portal Users', 'Account Demographics', 'Policies', 'Insurance Eligibility', 'Account Balances', and 'Time of Service Payments'. The main content area is titled 'Patient Check-In' and contains two tables: 'Patient Demographics' and 'Account Demographics'. The 'Patient Demographics' table shows information for Elizabeth Patterson, including her name, nickname 'Betty', date of birth '07/05/21', sex 'Female', race 'White', ethnicity 'Not Hispanic or Latino', and preferred language 'English'. The 'Account Demographics' table shows information for Frank Patterson, including his name, address 'Rd#5 Box 5078 Saint Johnsbury Center, VT 05863', and various phone numbers. Below the tables, there is an 'Import' button and a note: 'Pre-Check information submitted by Frank Patterson (Father) 07/03/23 1:27pm'. At the bottom, there are 'Patient Demographics' and 'Patient Information' sections with input fields for 'First Name' (Elizabeth) and 'Patient Flags'. Navigation buttons 'Previous', 'Next', 'Cancel', 'Save', and 'Save + Check In' are located at the bottom right. The system tray at the bottom shows 'Signed in: erica at Lake' and the time '01:27 PM'.

| Patient Demographics | | Current | Pre-Check Information |
|----------------------|---------------------|---------|---|
| Name | Elizabeth Patterson | | <input checked="" type="checkbox"/> Elizabeth Lee Patterson |
| Nickname | | | <input checked="" type="checkbox"/> Betty |
| Date of Birth | 07/05/21 | | 07/05/21 |
| Sex | Female | | Female |
| Race | | | <input checked="" type="checkbox"/> White |
| Ethnicity | | | <input checked="" type="checkbox"/> Not Hispanic or Latino |
| Prof. Language | | | <input checked="" type="checkbox"/> English |

| Account Demographics | | Current | Pre-Check Information |
|----------------------|---|---------|---|
| Name | Frank Patterson | | Frank Patterson |
| Address | Rd#5 Box 5078 Saint Johnsbury Center, VT 05863 | | Rd#5 Box 5078 Saint Johnsbury Center, VT 05863 |
| Home Phone | 802-555-0105 | | 802-555-0105 |
| Work Phone | 802-555-0106 | | 802-555-0106 |
| Cell Phone | 802-555-0193 | | 802-555-0193 |
| Emg Phone | 802-555-0197 | | 802-555-0197 |
| Email | | | <input checked="" type="checkbox"/> frankie@pcc.com |

What's Next?

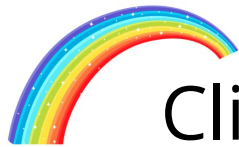
Other Updates in the Works

- Associate insurance card images with insurance policies
- Allow clients access to the Room List Editor tool
- Provide visibility to draft portal messages

Courses to Check Out

| Wednesday | Thursday |
|--|---|
| <p>PCC Shortcuts for Faster Charting <i>1:15pm - Emerald I</i> <i>Sarah Bunning</i></p> <p>Messaging to Patients <i>1:15pm - Emerald II</i> <i>Sasha Pavlovic & Scarlett Tomlinson</i></p> | <p>CHADIS Workflow Roundtable <i>2:30pm - Diamond</i> <i>Sasha Pavlovic</i></p> <p>Pre-Check-In Takes Flight <i>3:45pm - Amphitheater</i> <i>Erica Greenwood & Amanda Smith</i></p> |

Clinical Data Exchange



Clinical Interoperability

Jennifer Marsala

PCC eRx



Morgan Ellixson Boyea

Clinical Data Exchange: *Building Connections*



Clinical Data

C-CDA

Claims data

Custom Exports

Demographics

eLab Results

IMMUNIZATIONS

Third Parties

IMMUNIZATION REGISTRIES

CINs

Lab Facilities

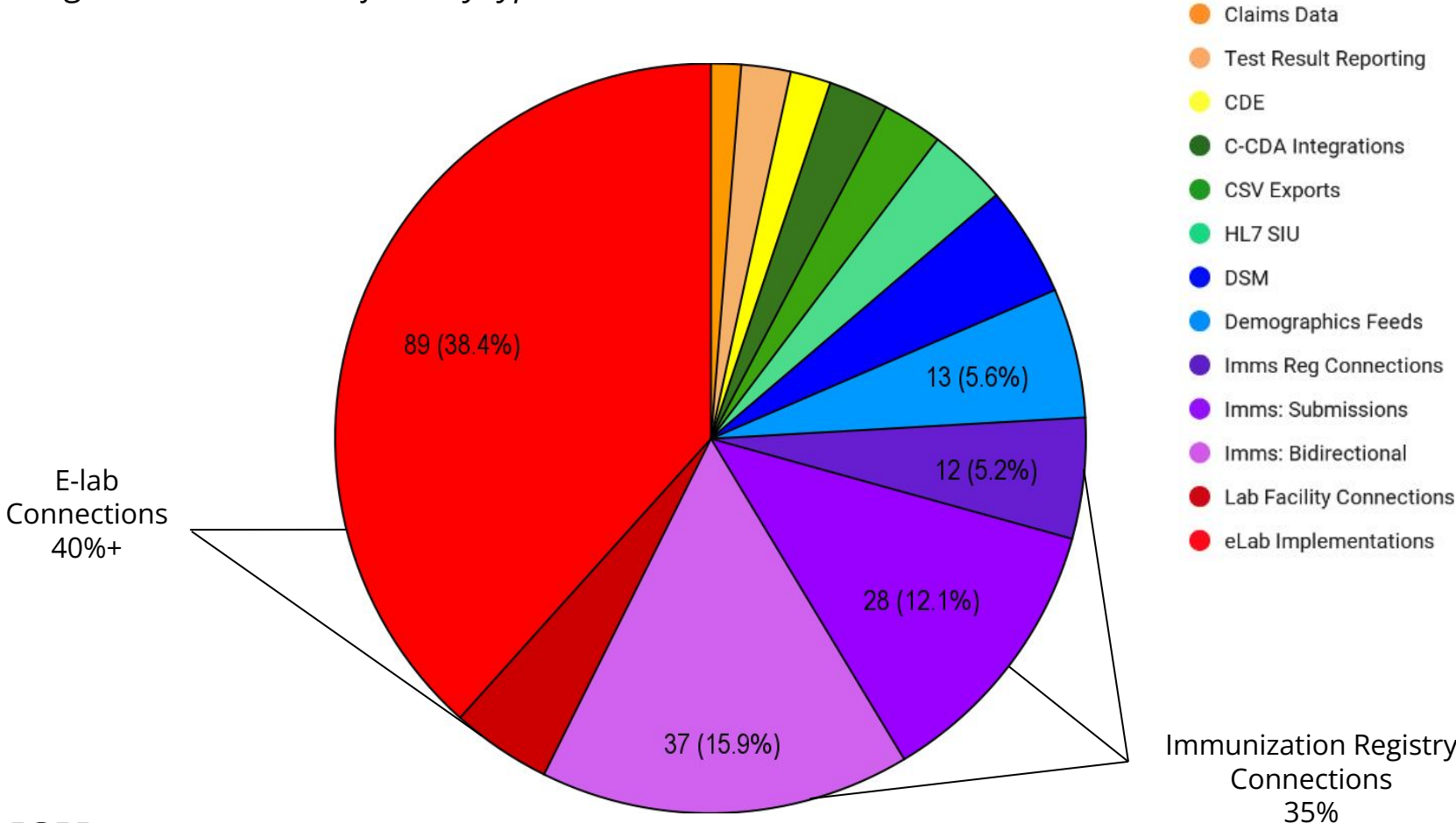
ACOs

Provider Organizations

HIEs



Building Connections: Interfaces by type built since the last UC



Newest Interoperability Connections





Which Interfaces are Right for Your Practice?

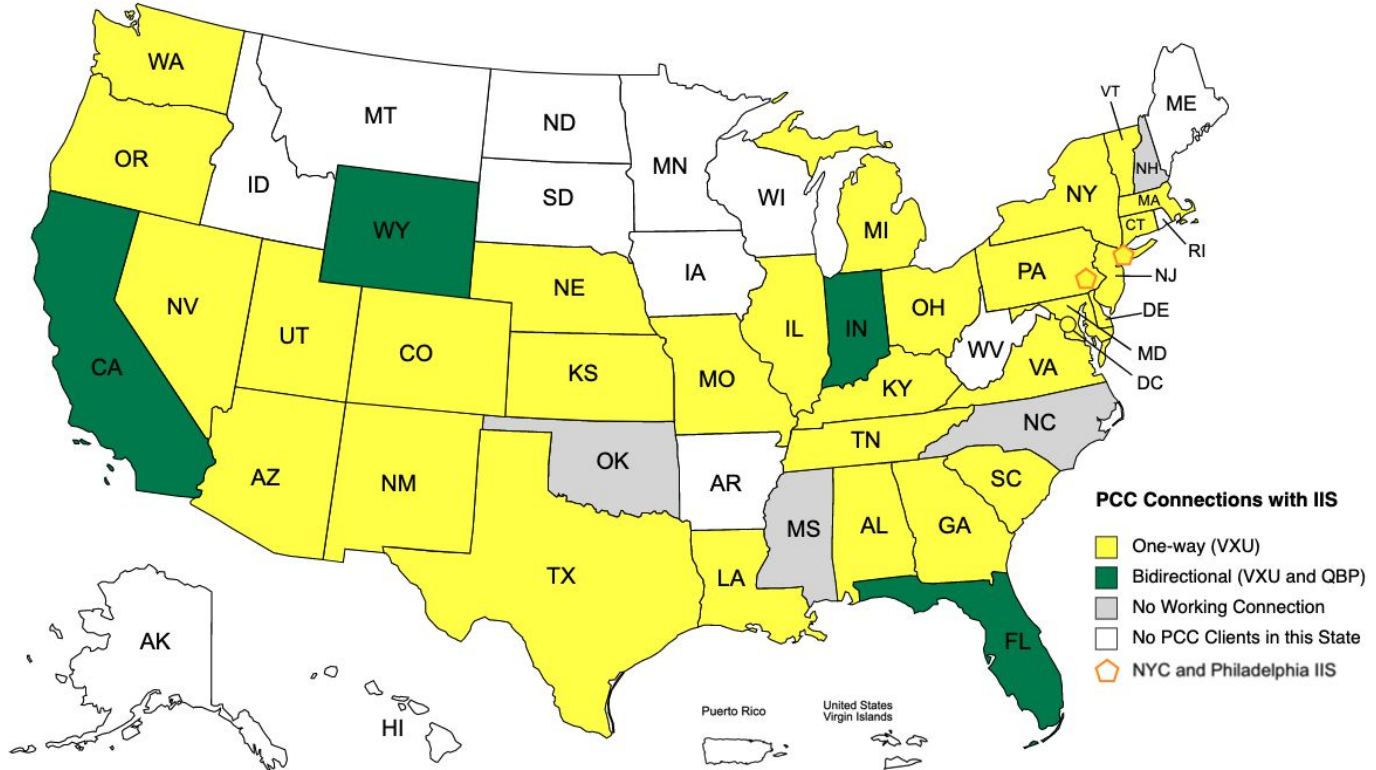
Scott Kirby

Discover which PCC integration options best address specific data sharing use-cases, and which might be a good fit for your practice.

Wednesday, 1:15PM in Diamond

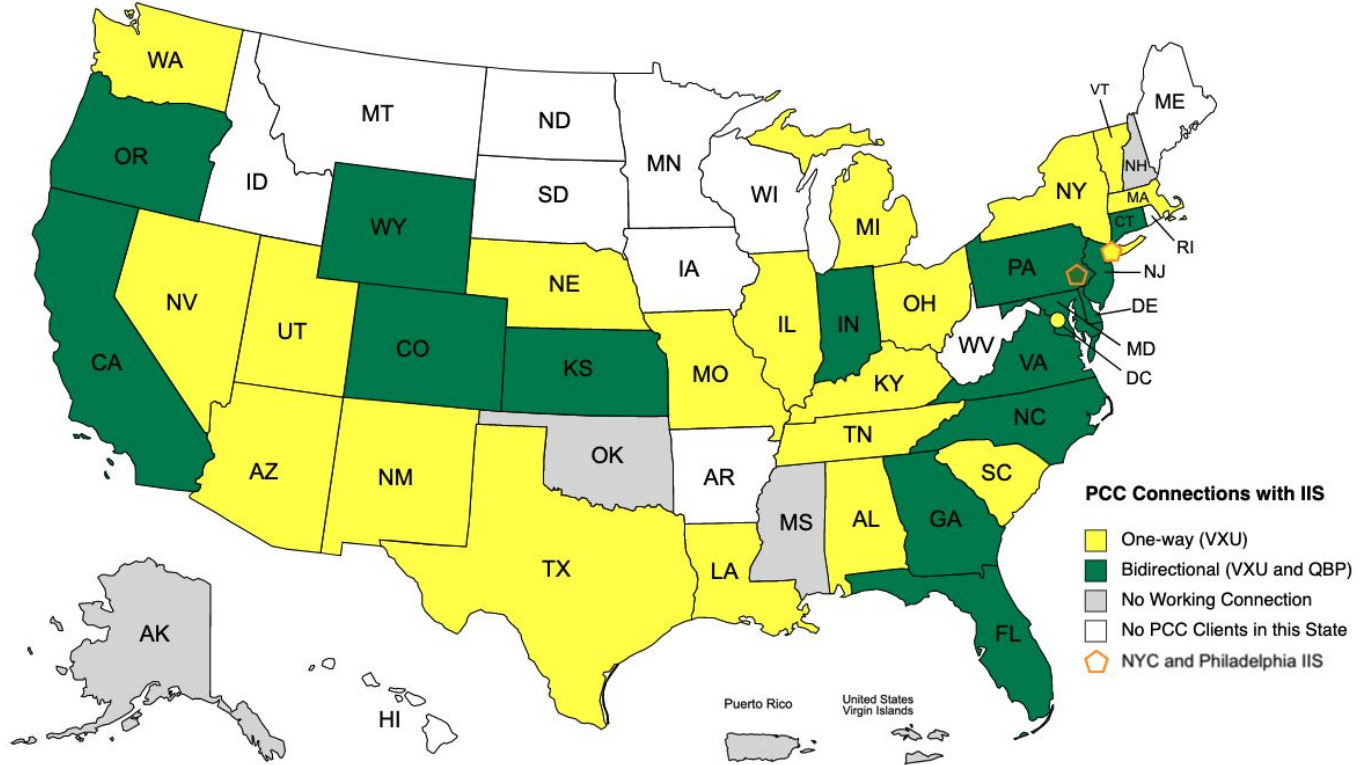
Immunization Registry Connections

Summer 2021



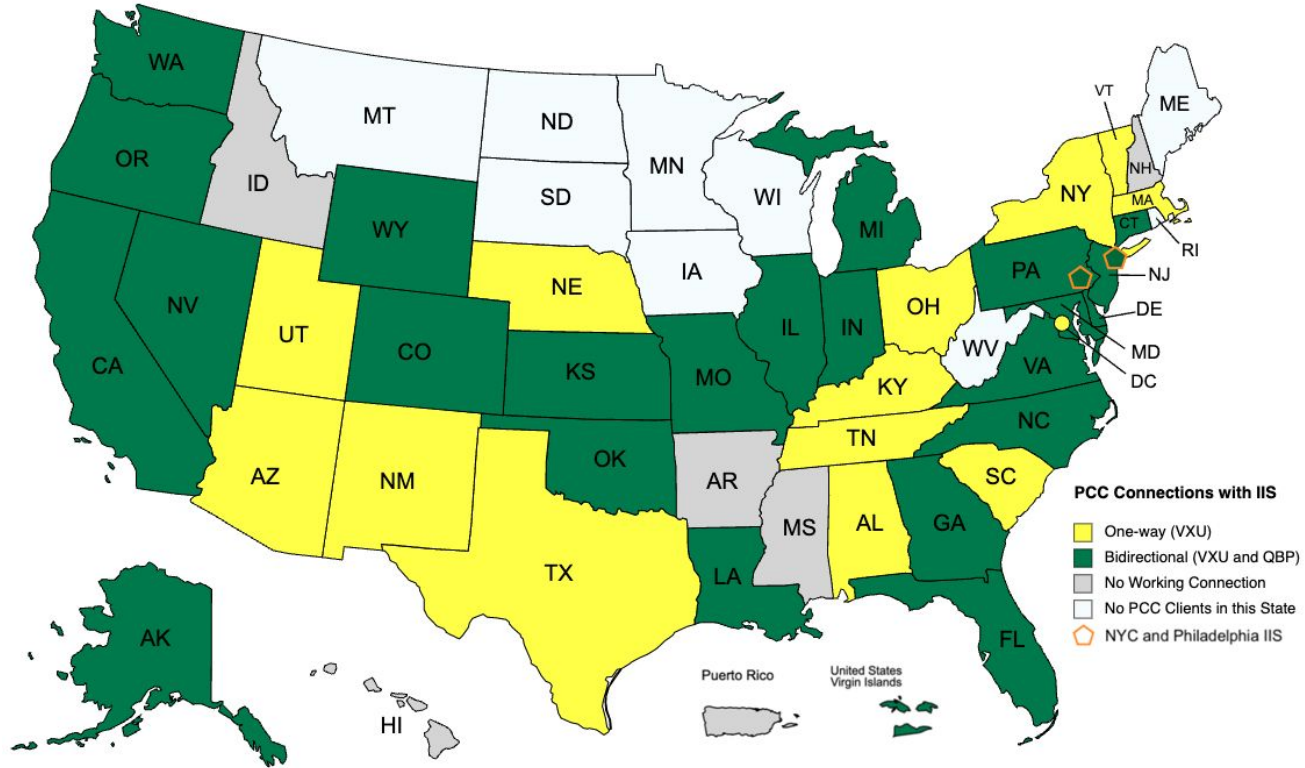
Immunization Registry Connections

Summer 2022



Immunization Registry Connections

Summer 2023



Immunization Integration Program (IIP)



In April, PCC became the *first* EHR vendor to receive IIP Recognition under the newest IIP requirements for PCC EHR's immunization capabilities.



HIMSS



AIRA
AMERICAN IMMUNIZATION
REGISTRY ASSOCIATION





ImmTrac Roundtable

Romni Palmer

An opportunity for Texas clients to discuss workflows that impact immunization submissions to ImmTrac.

Wednesday, 3:45PM in Open Lab

Monitoring your Immunization Submissions

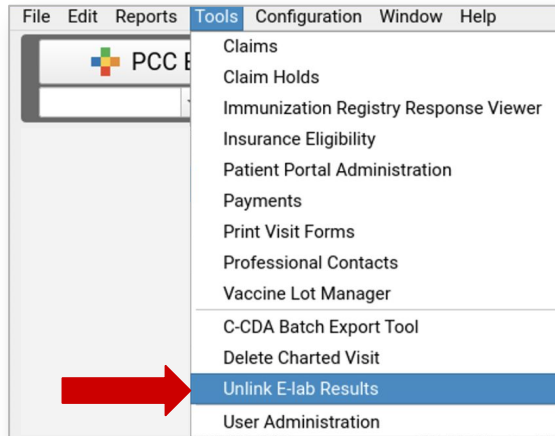
Romni Palmer

This course covers the basics of using the Immunization Registry Response Viewer to check on your practice's submissions to the state registry.

Friday, 1:15PM in Emerald I

Unlink E-lab Results Tool

In 9.7, you can unlink elab results attached to the wrong patient or encounter *without* calling PCC Support.

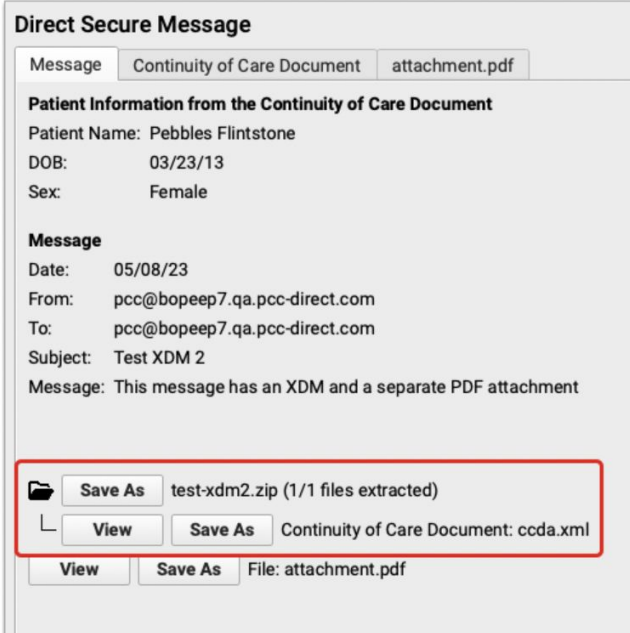


The screenshot shows the 'Unlink E-lab Results' tool window. It displays a table of lab results with columns for Imported Date, User, Reported Patient, Orders, Vendor, Linked Patient, Visit Date, and Protocols. The 'Unlink' button at the bottom right is circled in red.

| Imported Date | User | Reported Patient | Orders | Vendor | Linked Patient | Visit Date | Protocols |
|-----------------|-------------|--------------------|--|-------------------|-----------------------------|-----------------|---------------------------|
| 04/21/23 3:32pm | Jen Marsala | TC1B UCULTURE TEST | CULTURE, URINE, ROUTINE | QUEST | George Costanza (PCC# 3481) | 04/13/23 4:20pm | Phone Note |
| 04/21/23 3:31pm | Jen Marsala | TC1B MIDDLE TEST | HEPATITIS PANEL COMPREHENSIVE METABOLIC PANEL W/EGFR TSH | QUEST | Elaine Benes (PCC# 3478) | 04/14/23 9:00am | Sick - Bright Futures |
| 04/21/23 3:31pm | Jen Marsala | William A Jones | Lipid 1996 panel in Serum or Plasma | NIST Lab Facility | David Puddy (PCC# 3483) | 04/21/23 3:31pm | Unsolicited E-lab Resu... |

Support for Zipped Attachments

In 9.7, PCC EHR extracts C-CDA documents and PDFs from zipped attachments.



Direct Secure Message

Message Continuity of Care Document attachment.pdf

Patient Information from the Continuity of Care Document
Patient Name: Pebbles Flintstone
DOB: 03/23/13
Sex: Female

Message
Date: 05/08/23
From: pcc@bopeep7.qa.pcc-direct.com
To: pcc@bopeep7.qa.pcc-direct.com
Subject: Test XDM 2
Message: This message has an XDM and a separate PDF attachment

📁 Save As test-xdm2.zip (1/1 files extracted)
└─ View Save As Continuity of Care Document: ccda.xml
View Save As File: attachment.pdf



Sharing Clinical Records: DSM & CDE

Jennifer Marsala

This course will explore Direct Secure Messaging and Clinical Document Exchange, two solutions that allow your practice to share data more easily with third parties. Learn the difference between the solutions, how they complement each other, and how to onboard!

Thursday, 2:30PM in Emerald I

 Continue building connections

 Improvements to immunization forecasting in PCC EHR

 Research and planning for a PCC-built elab ordering solution

Updates From the Land of PCC eRx



PCC eRx: A Year in Review

- PHP & QT infrastructure updates - behind the scenes
- NCPDP mandated changes relating to inhalers, vials, and more!
- Nomenclature updates for Concerta & the authorized generic
- Project kick-off for replacing current formulary service
- Poly Vi Flor is back - both drops & chewables!
- EndeavorRx makes its debut



PCC eRx: A Year in Review - Assorted Bug Fixes

- EpiPen (Adult & JR) defaulting to Dispense Qty of 1 Day = print only mode!
- Calculate dose for weight button requires 2 clicks to generate dose needed
- Trouble with WB dosing for Bactrim and Augmentin - mg vs mL calculations
- "Medication is incomplete" error for complex drug strengths (Paxlovid and Daytrana)
- Drug entries containing apostrophes cause various errors in PCC eRx
- Issues prescribing pseudoephedrine products in some states - relating to DEA Schedule Errors



What's Next for PCC eRx?

9.7 Release (July 2023) > **9.8** Release (October 2023) > **Beyond**



What's Next for PCC eRx: Pharmacy Improvements



- Give users a choice of what the preferred pharmacy should be when adding a new pharmacy
- Share default pharmacy information across siblings
- Make it easier to find the right pharmacies: nicknames, custom notes or other identifying information



** Arriving in July 2023!*

New & Improved Pharmacies Component Default Pharmacy Settings



Pharmacies

| Pharmacy | Address | Type | Phone | Fax |
|-------------------------------------|-------------------------|---|--|-------------------------------|
| <i>Default pharmacy</i> | | | | |
| <input checked="" type="checkbox"/> | Green Mountain Pharmacy | 5700 Rt. 100 Unit C-10, Londonderry, VT 051480576 | Retail, Accepts EPCS | (802) 824-3344 (802) 824-3332 |
| <i>Additional pharmacies</i> | | | | |
| <input type="checkbox"/> | Friendly Pharmacy | 223A W 231st St, Bronx, NY 104635301 | Retail, SupportsDigitalSignature, Accepts EPCS | (718) 884-2908 (718) 884-2904 |

Add Pharmacy

PCC eRx PCC eRx Rx Queue My Settings

Pharmacies

Set defaults for the Pharmacies component.

Make newly added pharmacies the patient's default

Always

Never

Ask each time

Automatically apply pharmacy changes to all siblings

Always

Never

Ask each time



Adding a new Pharmacy - Ask Each Time



Set default pharmacy

Do you want to make this the default pharmacy?

Rainbow Care Pharmacy
135-42 Roosevelt ave
Flushing, NY 11354

| Pharmacies | | | | |
|---|---|--|----------------|----------------|
| Pharmacy | Address | Type | Phone | Fax |
| <i>Default pharmacy</i> | | | | |
| <input checked="" type="checkbox"/>  Rainbow Care Pharmacy | 135-42 Roosevelt ave, Flushing, NY 11354 | Retail, SupportsDigitalSignature, Accepts EPCS | (718) 886-5899 | (718) 886-8399 |
| <i>Additional pharmacies</i> | | | | |
| <input type="checkbox"/>  Friendly Pharmacy | 223A W 231st St, Bronx, NY 104635301 | Retail, SupportsDigitalSignature, Accepts EPCS | (718) 884-2908 | (718) 884-2904 |
| <input type="checkbox"/>  Green Mountain Pharmacy | 5700 Rt. 100 Unit C-10, Londonderry, VT 051480576 | Retail, Accepts EPCS | (802) 824-3344 | (802) 824-3332 |
| <input type="button" value="Add Pharmacy"/> | | | | |

Share Pharmacies Across Siblings



PCC EHR

Medical Summary

Siblings

| | | | | |
|-------------------|-------------------------|----------------|----------|---|
| Open Chart | Ernest "Trey" Anastasio | 14 yrs, 3 mos | 01/25/09 | M |
| Open Chart | Bob Weir | 15 yrs, 10 mos | 06/28/07 | M |
| Open Chart | Jerry Garcia | 17 yrs, 6 mos | 10/28/05 | M |

John Canning PCC# 3314

Medical Summary

Outstanding Tasks

Forms

PCC eRx PCC eRx Rx Queue My Settings

Pharmacies

Set defaults for the Pharmacies component.

Make newly added pharmacies the patient's default

- Always
- Never
- Ask each time

Automatically apply pharmacy changes to all siblings

- Always
- Never
- Ask each time



Share Across Siblings - Ask Each Time



PCC EHR Medical Summary

John Canning PCC# 3314

Medical Summary

Outstanding Tasks

Forms

Siblings

| | | | | |
|------------|-------------------------|----------------|----------|---|
| Open Chart | Ernest "Trey" Anastasio | 14 yrs, 3 mos | 01/25/09 | M |
| Open Chart | Bob Weir | 15 yrs, 10 mos | 06/28/07 | M |
| Open Chart | Jerry Garcia | 17 yrs, 6 mos | 10/28/05 | M |

PCC eRx PCC eRx Rx Queue My Settings

Pharmacies
Set defaults for the Pharmacies component.

Make newly added pharmacies the patient's default

Always
 Never
 Ask each time

Automatically apply pharmacy changes to all siblings

Always
 Never
 Ask each time

Pharmacies

| Pharmacy | Address | Type | Phone | Fax |
|---|--|----------------------|----------------|----------------|
| Default pharmacy | | | | |
| <input checked="" type="checkbox"/> AmEx Pharmacy | 1515 Elizabeth St., Suite J, Melbourne, FL 32901 | Retail, Accepts EPCS | (800) 644-9431 | (321) 872-0721 |
| Additional pharmacies | | | | |
| <input type="checkbox"/> HelloRx Pharmacy | 2268 Senter Rd., San Jose, CA 95112 | Retail, Accepts EPCS | (408) 222-9889 | (408) 222-9890 |

Add Pharmacy

Search near Zip Code:

Patient ZIP code: (05404)
 Practice ZIP code: (05404)

Search: funderburk

Sorted by distance from zip code 05404

- Funderburk's Pharmacy, Inc. -- 134 W. Commerce Street Hernando MS 38632-2240 (Retail, Accepts EPCS) (2099 mi)

Update pharmacies for siblings

Pharmacy has been successfully added for JOHN CANNING.

Update pharmacies for siblings

Funderburk's Pharmacy, Inc. will be added to the selected siblings:
(You can uncheck any siblings that you do not want to receive this change.)

ERNEST ANASTASIO
 JERRY GARCIA
 BOB WEIR

Add Custom Search Terms or Nicknames to any Pharmacy



Pharmacy Nicknames

Create searchable nicknames for pharmacies. Nicknames appear in the the Pharmacies component and in search results.

Pharmacy search:

Cancel

Current pharmacy nicknames

| Delete | Edit | Pharmacy Name & Address | Nickname | Created By | Created Datetime | Admin Comment |
|--------|------|--|----------------------------|-----------------------|-----------------------|---------------|
| | | CVS/pharmacy #0647 250 PLAINFIELD ROAD WEST LEBANON, NH 03784 | Across from Hospital | MORGAN ELLIXSON-BOYEA | 2023-05-16 04:53pm | |
| | | Yalaha Pharmacy 8735 County Rd 48 Yalaha, FL 34797 | Next to the train station! | PCC PCC | 2022-11-16 10:15am | |



PCC eRx > Administration > Pharmacy Nicknames



Add Custom Search Terms or Nicknames to any Pharmacy



Pharmacies

| Pharmacy | Address | Type | Phone | Fax |
|-------------------------------------|-------------------------|---|----------------------|-------------------------------|
| <i>Default pharmacy</i> | | | | |
| <input checked="" type="checkbox"/> | Green Mountain Pharmacy | 5700 Rt. 100 Unit C-10, Londonderry, VT 051480576 | Retail, Accepts EPCS | (802) 824-3344 (802) 824-3332 |

Add Pharmacy

Search near Zip Code:

Patient ZIP code: (05062)

Practice ZIP code: (05404)

Search:

Sorted by distance from zip code 05404

- best results --*
- WALGREENS DRUG STORE #17485 (*Next to Taco Truck*) -- 321 MAIN ST (NEC OF BURLING STREET & ETHAN ALLEN) WINOOSKI VT 05404-1380 (Retail, Accepts EPCS) (0 mi)
- WALGREENS DRUG STORE #11526 -- 514 FARRELL ST (NEC OF US RTE 7(SHELBURNE) & FARREL) BURLINGTON VT 05401-6907 (Retail, Accepts EPCS) (2 mi)
- Walgreens Drugstore #19449 -- 158 CHERRY ST (NWC OF CHERRY ST & S WINOOSKI AVE) BURLINGTON VT 05401-3818 (Retail, Accepts EPCS) (2 mi)

Pharmacies

| Pharmacy | Address | Type | Phone | Fax |
|-------------------------------------|---|---|----------------------|-------------------------------|
| <i>Default pharmacy</i> | | | | |
| <input checked="" type="checkbox"/> | Green Mountain Pharmacy | 5700 Rt. 100 Unit C-10, Londonderry, VT 051480576 | Retail, Accepts EPCS | (802) 824-3344 (802) 824-3332 |
| <i>Additional pharmacies</i> | | | | |
| <input type="checkbox"/> | WALGREENS DRUG STORE #17485 (<i>Next to Taco Truck</i>) | 321 MAIN ST (NEC OF BURLING STREET & ETHAN ALLEN), WINOOSKI, VT 054041380 | Retail, Accepts EPCS | (802) 655-2444 (802) 655-7290 |

Add Pharmacy



PCC eRx Bug Fixes coming in 9.7 Release



- Assorted Favorites Issues
 - Deleting a favorite from My Settings yielded an endless deleting experience
 - Favorites saved with custom dispense quantities not respected at time of prescribing
 - Asynchronous error when creating a favorite from a Pending Rx
- Improper truncation of dispense quantity at the decimal value (think: albuterol inhalers)
- Various logs incorrectly displayed “ampoule” as unit of measure instead of intended designation of ‘each’
- And a few behind-the-scenes fixes!



What's Next for PCC eRx?



Real Time Prescription Benefit Service and On-Demand Formulary



INTERFERON ALFA-2B (INTRON A) 

Instruction Only

10 to choose units (show all units)

Dose Form: 10 million unit (1 mL) recon soln

IM (show all routes) 3 days a week (show all frequencies) PRN

Wt-based Dosing: (Weight kg)

Adjustments:



Prescription:

Days Supply: 30 DAW


Dispense: 1 vial

Number of Refills: PRN

Date to Fill:

Prevent Renewal Requests:

Follow up provider:

 **Formulary Support:**
Brand, Rx, Non-formulary
Copay Specialty Pharmacy: 20% (\$75 - \$150) T4/5
Coverage Factors Exist
[click to view full formulary details](#)

[Click to view Alternatives](#)



Current Formulary Support in PCC eRx



What's Next for PCC eRx: Real Time Prescription Benefit Service



LISDEXAMFETAMINE (VYVANSE CAPSULE)

Qty: to 40 mg capsule

[\(show all routes\)](#) [\(show all frequencies\)](#) PRN

Adjustments:

Prescription:

Days Supply: DAW

Dispense: Capsule

Number of Refills: PRN

Date to Fill: Create 3 month supply

Prevent Renewal Requests:

Follow up provider:

Real-Time Pricing
\$55.00 / month
Prior Auth Not Required

Real-Time Pricing Formulary Summary

| Alternatives | Alerts | Prior Auth | Pharmacy | Price | |
|--|--------|--------------|----------|----------------|---------------------------------------|
| METHYLPHENID CAP 30MG | | Not Required | Retail | \$8.00 / month | <input type="button" value="Select"/> |
| AMPHET/DEXTR CAP 25MG ER | | Not Required | Retail | \$8.00 / month | <input type="button" value="Select"/> |
| DEXMETHYLPHE CAP 20MG ER | | Not Required | Retail | \$8.00 / month | <input type="button" value="Select"/> |
| ATOMOXETINE CAP 40MG | | Not Required | Retail | \$8.00 / month | <input type="button" value="Select"/> |
| CLONIDINE TAB 0.1MG ER | | Not Required | Retail | \$8.00 / month | <input type="button" value="Select"/> |



Bug Fixes - Coming Later this Year



- Revisit deletion behavior in Medication Hx relating to RxCancel messages
- Trouble with ADHD medications amidst industry shortages (need to delete & send to new pharmacy)
 - Unexpected errors relating to future start date or day supply limit
- Patient Takes No Medication Issues
 - Inability to click on PTNM even with no medications on list
 - PTNM entry occasionally still present in PCC EHR Medication Hx alongside active medications





What's Next for PCC eRx *after RTPB* Electronic Prior Authorization

MOMETASONE-FORMOTEROL (DULERA 100 MCG-5 MCG/ACTUATION AEROSOL) Instruction Only

2 to puff(s) [\(show all units\)](#)

Dose Form: 100-5 mcg/actuation HFA aerosol inhaler ▼

Inhalation [\(show all routes\)](#) twice daily [\(show all frequencies\)](#) PRN

Prescription:

| | |
|--|--|
| Days Supply: 30 <input type="checkbox"/> DAW | Formulary Support: Brand, Rx, Unknown click to view full formulary details |
| Dispense: 1 <input type="text"/> 120 inhalation aerosol with adapter ▼ | |
| Number of Refills: <input type="text"/> <input type="checkbox"/> PRN | |
| Date to Fill: <input type="text"/> | |
| Prevent Renewal Requests: <input type="checkbox"/> | |
| Follow up provider: <input type="text"/> | |



CEDERSTROM, CHRIS 8454 Hillsdale Road Sheldon Springs, VT 05485 Phone (802) 555-0165

PRIOR AUTHORIZATION

The medication requires prior authorization for the prescription sent on 07/07/2022.

Message from Pharmacy

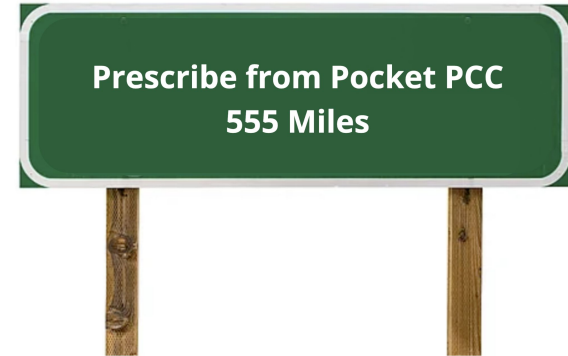
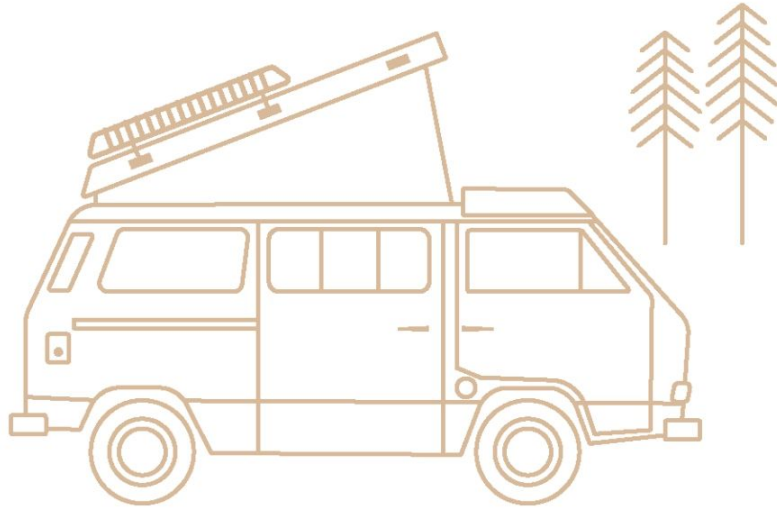
Prior Auth required for this patient's insurance. Thanks!

Dulera 100 mcg-5 mcg/actuation HFA aerosol inhaler (mometasone-formoterol)
2 puff(s) Inhalation twice daily
13 Gram, 0 refills

Please choose one option:

- Prior authorization has been submitted
- Prior authorization has not been submitted
- Cancel original prescription
- Reassign

Okay, so. What's *really* next for PCC eRx?



Let's Talk about PCC eRx!

Wednesday

Real Time Prescription Benefit Service - An Industry Perspective

with Dewey Howell, MD, PhD

Emerald I @ 230pm EST

Friday

What's Next for PCC eRx with Morgan - Emerald II @ 10am EST

&

Inaugural PCC eRx Open Lab

1230pm - 230pm



LIKE!

GETTING PAID
KELSEY TAVERAS
BUSINESS ANALYST

YEAH!

OMG!

WHO ARE WE?

“Ensure that clients are paid to provide and support pediatric care...Every pediatrician gets maximal payment for every service rendered with minimal administrative effort.”

WHAT'S NEW?

- Over 40 new real-time eligibility payors supported
- Up-to-date COVID-19 vaccine administration code support and resources
- Tons of new and refined billing related education documentation and videos
- SNOMED update
- oops: Limit the amount of locking it does
- Insurance policy with future start date should not be active in PCC EHR
- Personal Payments: Manually link payments
- Personal Payments: Payment History
- Personal Payments: Print a receipt
- Personal Payments: Edit posted payments
- Billing History: Display payments linked to procedures
- Billing History: Display greater detail in payment section
- Updated proc.codes for new EUA Pfizer COVID-19 Vaccine (codes: 91308, 0081A 0082A)
- Update COVID-19 Vaccine Article(s) for 5-11
- ERA Processing Handles Identical Filenames
- Configure and Route Claims By Servicing Provider
- Provide a way for eras to be posted when they contain RARCs
- Encounters with Different Places of Service will Be Divided Into Separate Claims
- Unlinked Multi-item payments display as a single payment
- Tags moved to SQL
- Hold Electronic Claims by Provider, Place of Service, and Insurance Plan
- Payments tool: Returned Checks
- Payments tool: Refund Credit Balances
- Account Notes component in Protocols
- Update proc.codes for new COVID-19 Vaccine
- Claims Submission from PCC EHR
- Claims Submission Session Log
- Claims tool, Needs Correction Tab added
- Claims tool, Improved Descriptions for Needs Correction Reasons
- Claims tool, Delete Claims from the Needs Correction Work-list
- Claims tool, Update the Log immediately after submitting claims
- Update ICD-10 Diagnoses to the April 1, 2023 edition
- Chronologically sort payments on receipts generated from the Payments tool's History tab
- Insurance Payments: Ability to manually post insurance payments





BAM!

NOTABLE MENTIONS

- **Personal Payments**
 - Manually link payments
 - Payment History
 - Print a receipt
- **Claims Submission from PCC EHR**
 - Needs Correction Tab added
 - Delete Claims from the Needs Correction Tab
 - Update the Log immediately after submitting claims
- **Update ICD-10 Diagnoses to the April 1, 2023 edition**
- **Insurance Payments: Ability to manually post insurance payments from PCC EHR**
- **Account Notes component in Protocols**

WHAT'S NEXT?

- Enhance Billing History in the EHR
- Insurance Payment Tool in EHR
 - Insurance Takebacks
 - Insurance Overpayments
 - Auto Posting
- Claims Tool in EHR
 - Fixing claims issues in the EHR
 - Paper claims in the EHR

KAPOW!

HOW CAN WE HELP?

Monthly Billing Drop-Ins

New Onsite Billing Visits

Call or Email Us



BOOM!

FIND US AT THE UC

- **Wednesday**
 - 1:15 p.m.-Wishing Well
 - 2:30 p.m.-Wishing Well
 - 3:45 p.m.- Grow Your Own EDI Super User! - Ben Brandt
- **Thursday**
 - 11:00 a.m.- A Doctor and a Coder Walk Into a Bar- Jan Blanchard & Krekamey Craig
 - 1:15 p.m.- Leave the Dark Side Behind: Post Charges, Submit Claims & More in PCC EHR - Brian Kennedy
 - 1:15 p.m.-Wishing Well
 - 2:30 p.m.-Wishing Well
 - 3:45 p.m.- Billing Drop In Live!
- **Friday**
 - 10:15 a.m.- 2023 Coding Updates - Jan Blanchard

Ensure Success

Lynne Gratton - Implementation

Kate Taylor - Client Advocate

Michael Tutt - Rapid Response Team

Tom Heller - Technical Solutions

Tim Proctor - Product Owner

Tori Wonderlick - Business Analyst

The Implementation Team



Nicole Broderick
Joined April 2022



Lynne Gratton
Joined July 1990



Nick Meunier
Joined February 2020



Jeff Nevius
Joined April 2022



Jen Perren
Joined October 2017

The Implementation Team



Arlo Cohen

Joined February 2023



Rick Wight

Joined May 2022



Melissa Guillermo

Joined June 2021

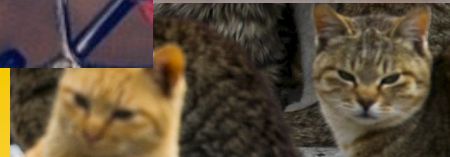
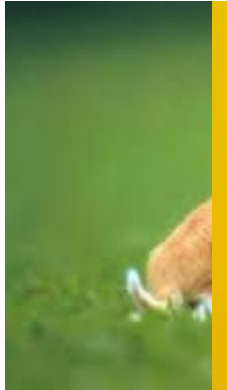


Cliff Wanner

Joined October 2008

What's New - Implementations

CATs



What's New - Implementations

Client-centered

Agile

Teams

(CATs)



What's New - Implementations



CATs to onboard new clients include:

- Implementation Specialists
- Data Conversion Specialist(s)
- Client Advocate
- Technical Specialist

What's New - Implementations

TEAMWORK



Client Advocate joins the implementation process to maintain continuity of care throughout the PCC Journey. The efficiencies gained with earlier involvement will mean more attention for everyone.

MAKES THE DREAM WORK

What's New - Implementations

Technical Specialists know your technical setup, less time figuring it out later



What's New - Client Advocacy



Erin Auer

Joined March 2020



Lee Gaboriault

Joined November 2021



Sabina Hasanovich

Joined November 2021



Jim Smith

Joined November 2015



Kate Taylor

Joined October 2017

What's New - Client Advocacy

Our New Client Advocates



Jolie Lavigne

Joined April 2023



Emily Stiffler

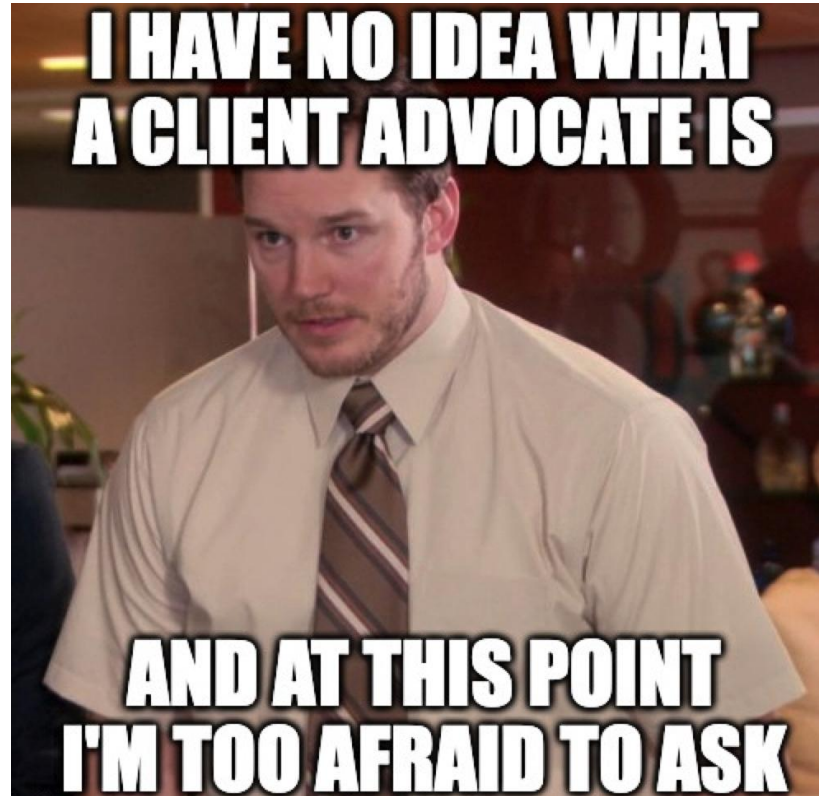
Joined April 2023



**Jerry
Wolfenbarger**

Joined November 2022

What's New - Client Advocacy



What's New - Rapid Response

RRT Then



Michael Tutt

Joined November 2016



Jack Roberts

Joined June 2021



Dario Gutura

Joined April 2019



Carrie Gillander

Joined April 2004



Ryan Brown

Joined March 2021



Brendan Genna

Joined November 2021



Conor Gillander

Joined October 2022

What's New - Rapid Response

RRT Now



Michael Tutt

Joined November 2016



Jack Roberts

Joined June 2021



Dario Gutura

Joined April 2019



Carrie Gillander

Joined April 2004



Ryan Brown

Joined March 2021



Brendan Genna

Joined November 2021

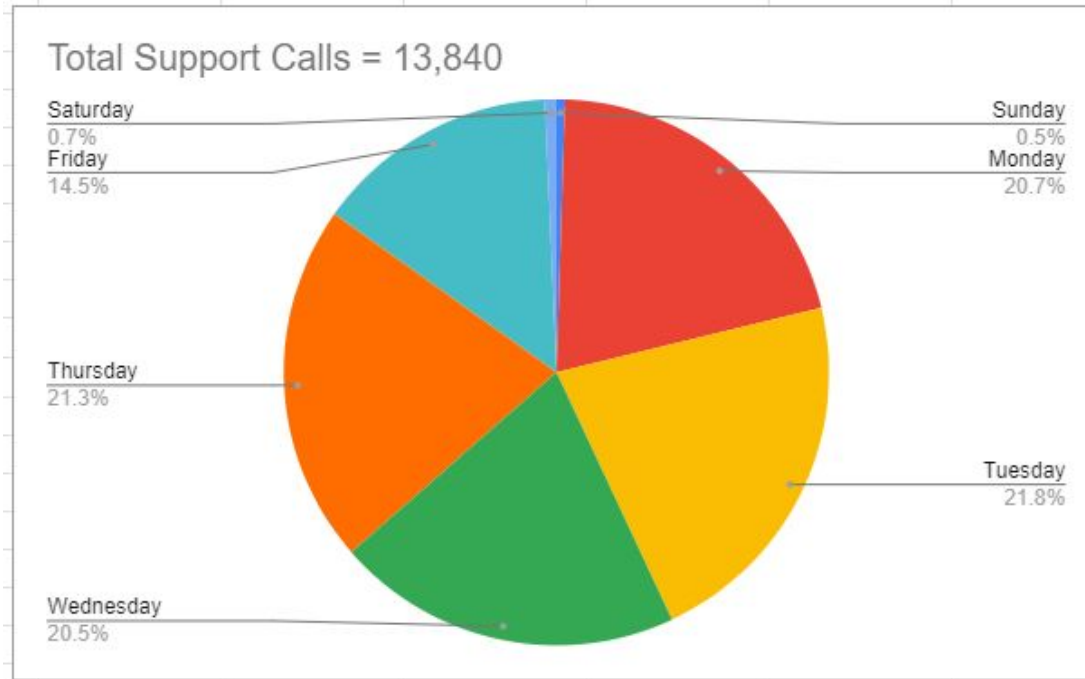


Conor Gillander

Joined October 2022

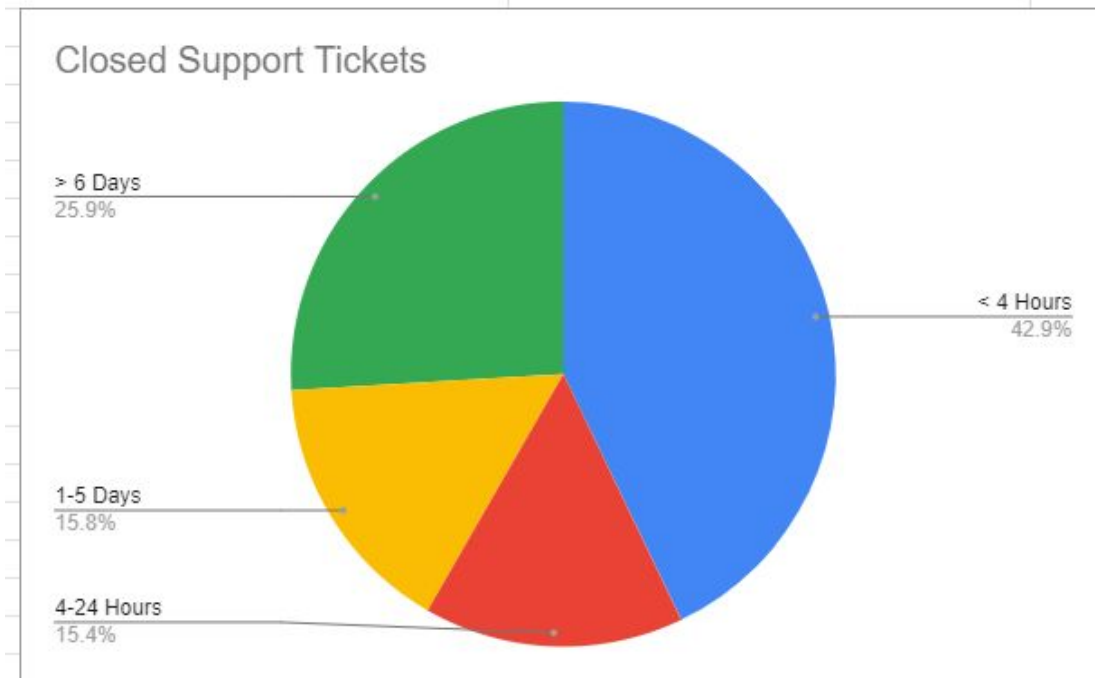
What's New - Rapid Response

July 2022 - July 2023



What's New - Rapid Response

July 2022 - July 2023



What's New - Technical Solutions



Tom Anderson
Joined July 2021



Jim Frei
Joined September 2019



Tom Heller
Joined August 2019



Steve Moore
Joined March 2020

Technical Solutions

- Your “technical service plan” with PCC includes:
 - Equipment
 - Active monitoring of your system
 - Proactive changes to keep your data and practice protected

What's New - Technical Solutions

GCE vs Physical Server

Evaluation will happen when your practice is due for a server upgrade

Requirements for GCE server

- Speed - down and up
- Latency
- Size of practice (no terminal servers)

There are many other details we examine to determine if a GCE is right for your practice.

What's Next - Technical Solutions

- Operating system on servers being upgraded
 - New operating system ensures server remains protected
 - The switch will require downtime, you will be contacted to coordinate
- New equipment & tools
 - Fortimanager, Cyberpower UPS, Nut Monitor & FreeNas mini

While at the UC...

Wednesday & Thursday 1:15-2:15 - Hardware Petting Zoo

Wednesday 2:30-3:30 - Change Management for Managing Change

Wednesday 3:45-4:45 - Front Desk Best Practices

Thursday 11:00-12:00 - PCC EHR Customizations for PCMH

Thursday 3:45-4:45 - What's Changed with Implementations?

Patient Forms

DT6



Tim Proctor

Joined January 1999



Bastien Glich

Joined July 2020



Dan Gilette

Joined October 2013



Tamsin Laflam

Joined December 2016



Bryan LeMoine

Joined May 2015



Ryan Brown

Joined March 2020



Tori Wonderlick

Joined March 2023

Sports Participation

Regarding Patient: John Canning

Date of Birth: 01/20/07

Age of Patient: 16y 5m

Medical Examination:

John was seen by us for a complete physical on 02/18/23.

John is healthy, non-infectious, and may participate in all sports and activities without restrictions.

Measurements on the above date were:

Height: 69 in (175.26 cm)

Weight: 165 lbs 10 oz (75.126 kg)

BP: 120/85 s/d

Sincerely,



Elizabeth Mary Casey, MD

What's New - Patient Forms

- Practice header configuration

Forms: **Header Configuration**

Forms Configuration

Search Filter:

| Name | Last Saved | Status |
|-----------------------|--|----------|
| School Exam Form | 10/27/2022 1:01pm Leonard McCoy, M.D. | Inactive |
| School/PE Excuse Form | 10/27/2022 12:18pm Leonard McCoy, M.D. | Inactive |
| Sports Form | 10/27/2022 12:17pm Leonard McCoy, M.D. | Inactive |
| Transfer Form | 10/27/2022 12:18pm Leonard McCoy, M.D. | Inactive |

Add **Delete** **Clone** **Edit** **Edit Display Order** **Close**

WINOOSKI 20 Winooski Falls Way
Suite 7
Winooski VT 05404-2228

PEDIATRICS

11/01/22

Regarding Patient: Andrew Wilson
Date of Birth: 03/25/10

Medical examination:

Andrew was seen by us for a complete physical on 11/01/22

Andrew is healthy, non infectious, and may participate in all sports and activities without any restrictions.

Thank you for your cooperations.

Sincerely,
PCC Pediatric Test Associates

What's New - Patient Forms

- Encounter-specific and vitals variables

The screenshot shows a window titled "Generate Form - BG Encounter Form". The main content area displays a letter template with the following text:

Dear Carrie Setlock,

Here are the vitals measurements from your encounter on **06/18/22** with Mark Williams, M.D.

Height: 140 cm (55.12 in)
Weight: 40 kg (88 lbs 3 oz)
Blood Pressure: 120/52 s/d
Pulse: 88 bpm

Best,
PCC Pediatric Test Associates

On the right side, there is a dropdown menu titled "Encounter" with the following options:

- 06/18/22 Mark Williams, M.D. Protocol: ...
- 09/04/22 Mark Williams, M.D. Med Review
- 06/21/22 Elizabeth Mary Casey, MD Sick - Bright Futures**
- 06/18/22 Mark Williams, M.D. Protocol: 10 Yr Well - TLC
- 04/04/22 Kathleen W. Gomez, M.D. Sick - Bright Futures

Red boxes highlight the date "06/18/22" in the letter text and the corresponding vital measurements below it. The "06/21/22 Elizabeth Mary Casey, MD Sick - Bright Futures" option is highlighted in blue in the encounter dropdown menu.

What's New - Patient Forms

- Signature Configuration and Permissions

Forms Configuration

Forms Header Configuration Signatures

Signature Image Configuration - Kathleen W. Gomez, M.D.

Signature Image

Generation Permissions

Unrestricted
All users are allowed to generate the signature image on forms.

Replace Delete Edit

Providers Search Filter:

| Image | Provider | Permission |
|-------|---------------------------|---------------------------------|
| ✓ | James Davidson, Jr. M.D. | Unrestricted: all users allowed |
| ✓ | Kathleen W. Gomez, M.D. | Unrestricted: all users allowed |
| ✓ | Fred Jones, M.D. | Allow List: 4 users allowed |
| ✓ | Leonard McCoy, MD | Block List: 2 users prevented |
| | Test ProviderEight, M.D. | N/A |
| | Test ProviderEleven, M.D. | N/A |

Close

What's New - Patient Forms

- Snap Text in Responses

Generate Form - PE Excuse Form

PCC Pediatric Test Associates
20 Winooski Falls Way Suite 7
Winooski, VT 05404-2228
(800) 722-7708

Certificate for Return to Physical Education

Regarding Patient: Carrie Setlock

Date of Birth: 06/15/12

This patient should be excluded from PE on the following date(s):
06/05/23 - 06/16/23

Signature
None

Excused Dates
06/05/23 - 06/16/23

Return to PE Date
06/19/23

Additional Notes
-peret

Type your short text into the form response field

What's New - Patient Forms

- Special Characters on Forms and Responses

Generate Form - PE Excuse Form

PCC Pediatric Test Associates
20 Winooski Falls Way Suite 7
Winooski, VT 05404-2228
(800) 722-7708

Certificate for Return to Physical Education

06/02/23

Regarding Patient: **Julián Martínez**

Date of Birth: 01/22/12

This patient should be excused from PE on the following date(s):
06/05/23 - 06/16/23

This patient may participate in Physical Education beginning on:
06/19/23

Notes:
Regrese a los deportes con solo la práctica y luego prograse a la competencia una vez se sienta mejor.

Have a wonderful day.

Sincerely,

Kathleen W. Gomez

Signature
Kathleen W. Gomez, M.D.

Excused Dates
06/05/23 - 06/16/23

Return to PE Date
06/19/23

Additional Notes
Regrese a los deportes con solo la práctica y luego prograse a la competencia una vez se sienta mejor.



Cancel Generate

What's Next For Patient Forms

- Spell check within form bodies and responses
- Ability to place or edit variables within .pdf forms

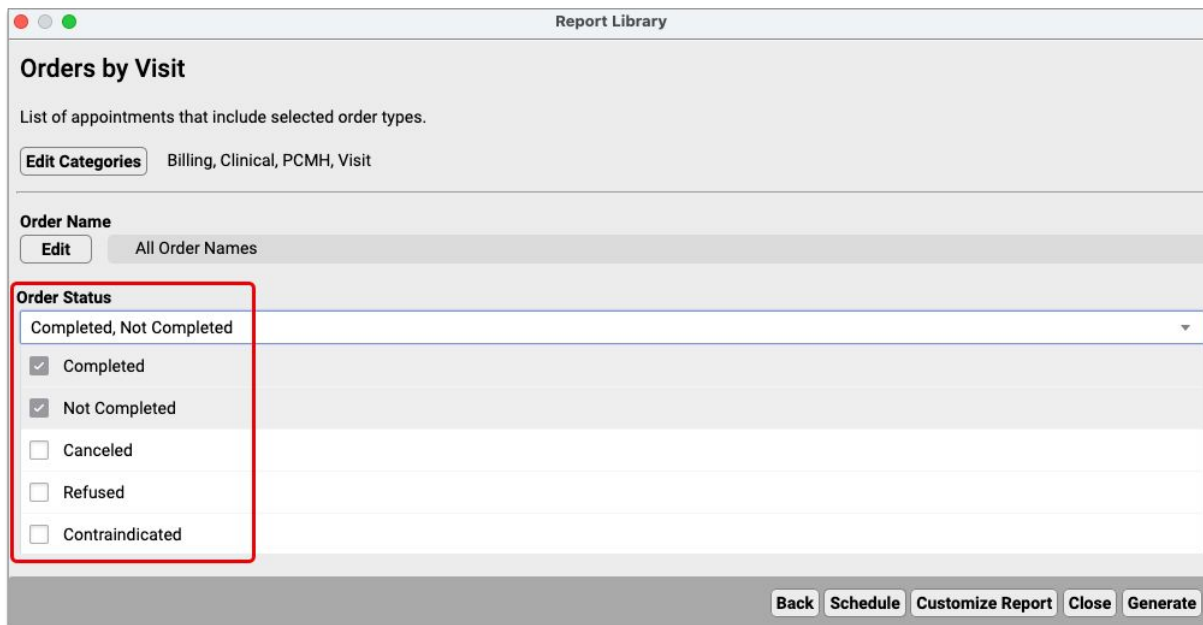
What's New - Report Library

- Reporting on Gender Identity and Sexual Orientation in Aggregate

| Reports | Scheduled Reports | Saved Results |
|--|-------------------|---|
| Reports | | |
| Patient Count and Percentage by Gender Identity  | | Stratification of your patient population by gender identity |
| Patient Count and Percentage by Sexual Orientation  | | Stratification of your patient population by sexual orientation |

What's New - Report Library

- Reporting on more order statuses



The screenshot shows a web application window titled "Report Library". The main heading is "Orders by Visit", followed by the text "List of appointments that include selected order types." Below this is a button labeled "Edit Categories" and the text "Billing, Clinical, PCMH, Visit". The next section is "Order Name" with an "Edit" button and the text "All Order Names". The "Order Status" section is highlighted with a red box and contains a dropdown menu currently set to "Completed, Not Completed". Below the dropdown are five checkboxes: "Completed" (checked), "Not Completed" (checked), "Canceled" (unchecked), "Refused" (unchecked), and "Contraindicated" (unchecked). At the bottom of the window are buttons for "Back", "Schedule", "Customize Report", "Close", and "Generate".

While at the UC...

Wed 3:45-4:45 - Sweet Forms O' Mine - An Introduction to New PCC Forms



Thu 1:15-2:15 - Everybody Wants to Use New Forms (workshop)



Fri 10:00-12:00 - Advanced Reporting Workshop


Supporting Cast




Kathy Gotter
Operational Specialist
Joined April 2019



Lewis Holcroft
Senior Technician
Joined April 1998



Bryan LeMoine
Training & Beta
Coordinator
Joined May 2015




Alex Meyer
Consultant
Joined July 2019



Chip Hart
Visionary
Joined November 1990



Lisa Legge
Operations & HR
Joined January 2004



Lauren Smith
Project Manager
Joined June 2011

Value Stream Leadership

Later Viewing

This and all other UC 2023 course recordings will be available for later viewing through the app.