PCC EHR Customizations & Workflows for Pediatric Medical Homes

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UC 2023

PCC
Pediatric EHR Solutions

Session Goals

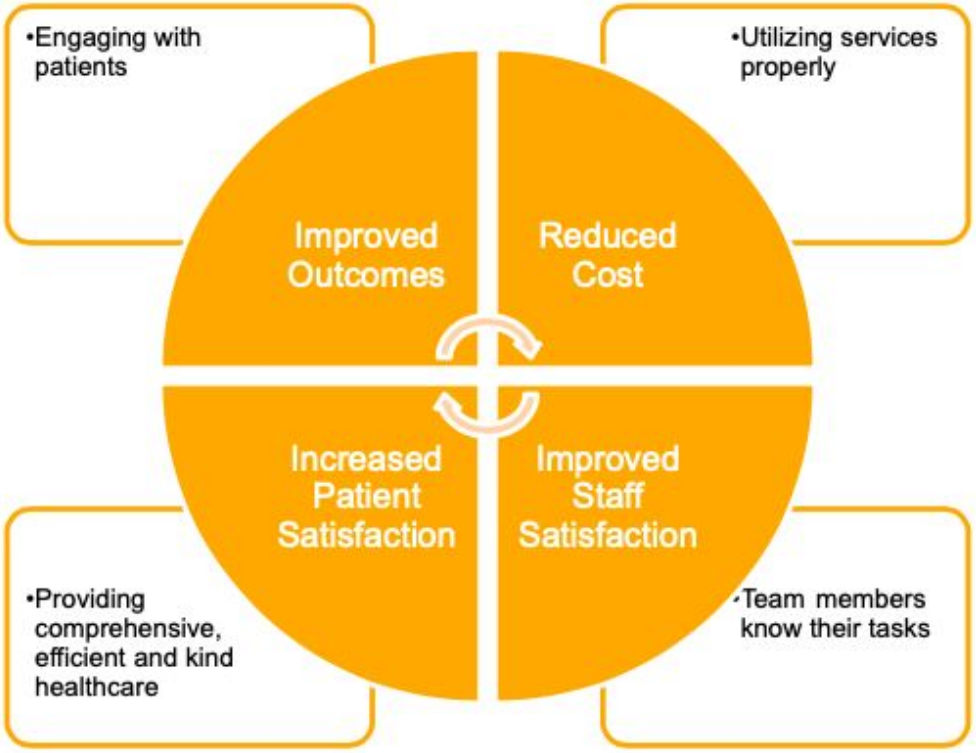
1. Learn easy to use tools that will improve operational workflows.
2. Apply manageable daily planning techniques for your staff.
3. Implement best-practices for large-scale patient management.

What Exactly Does “all of that” Mean?

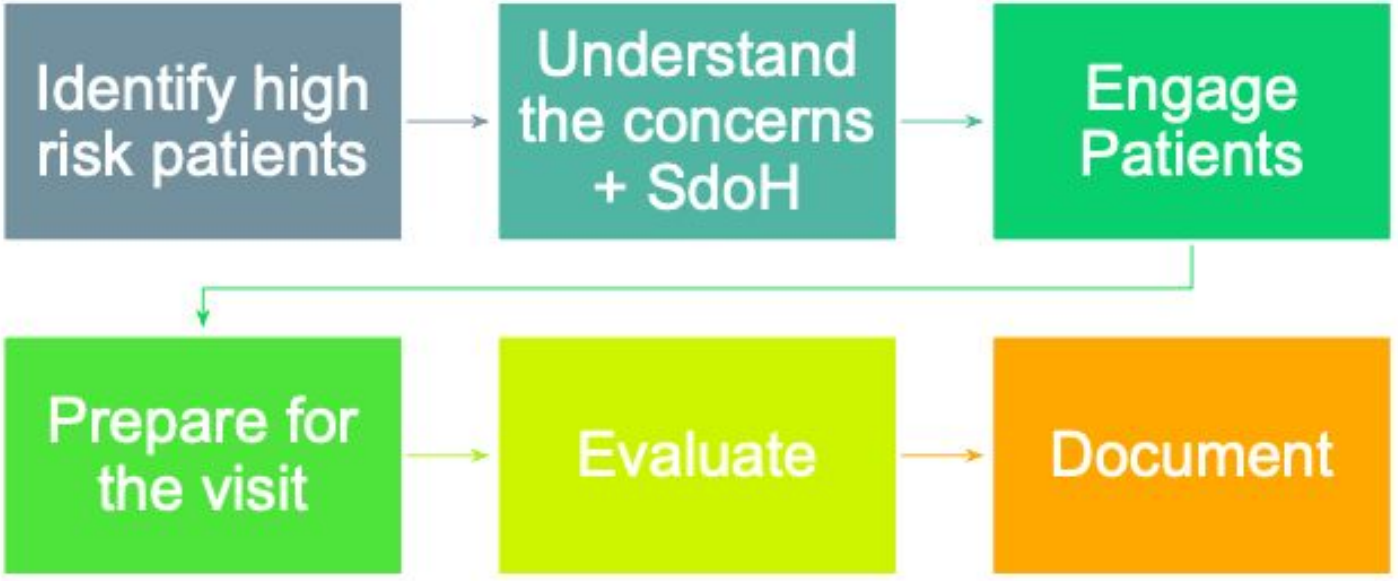
We’re going to show you how to

- Prepare for upcoming appointments by:
  - Maximizing the huddle sheet
  - Utilizing relevant clinical alerts
- Streamline complex patient care :
  - Tips & tricks on configuration settings
  - Customization to reduce free-text
  - Encouraging the patient portal

What is a Pediatric Medical Home?



Main Objective – Close Care Gaps



Pre-Visit Prep

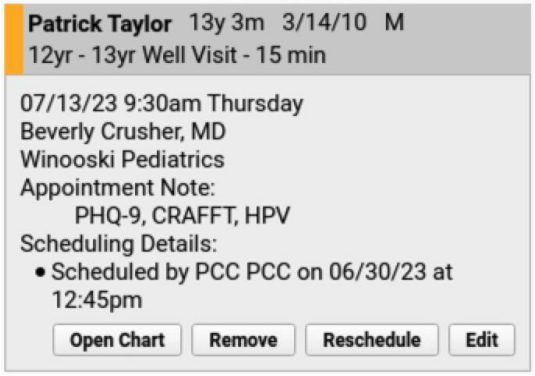
- ***Objective: providers to walk into the room one time***
- Pre-scheduled appointments
- Prep charts the day before the appointment
- Staff will understand the daily plan
- Improve patient flow
- Prevent unnecessary follow-up visits

Appointment Note

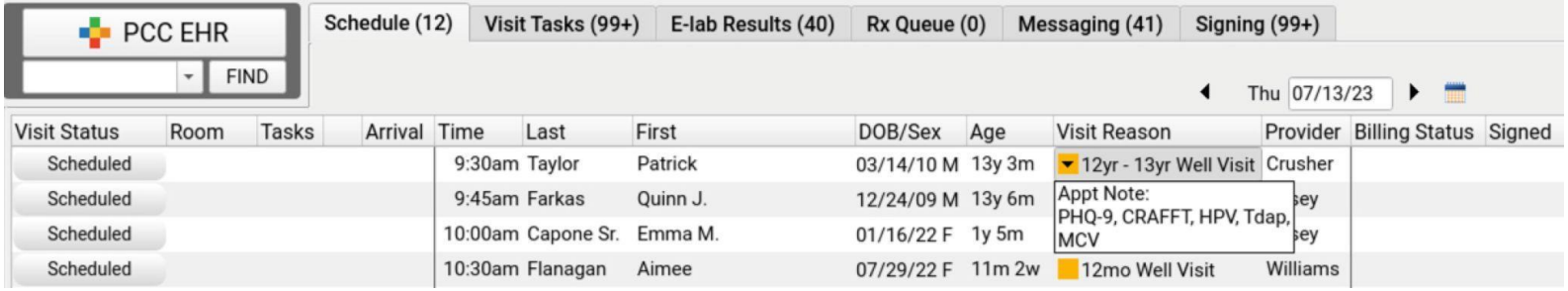
- Communication between departments
- Use snap-text standing orders by age for pre-scheduled appointments
- Same-day sick appointments need consistent details
- Populates onto the Huddle Sheet

Appointment Notes:

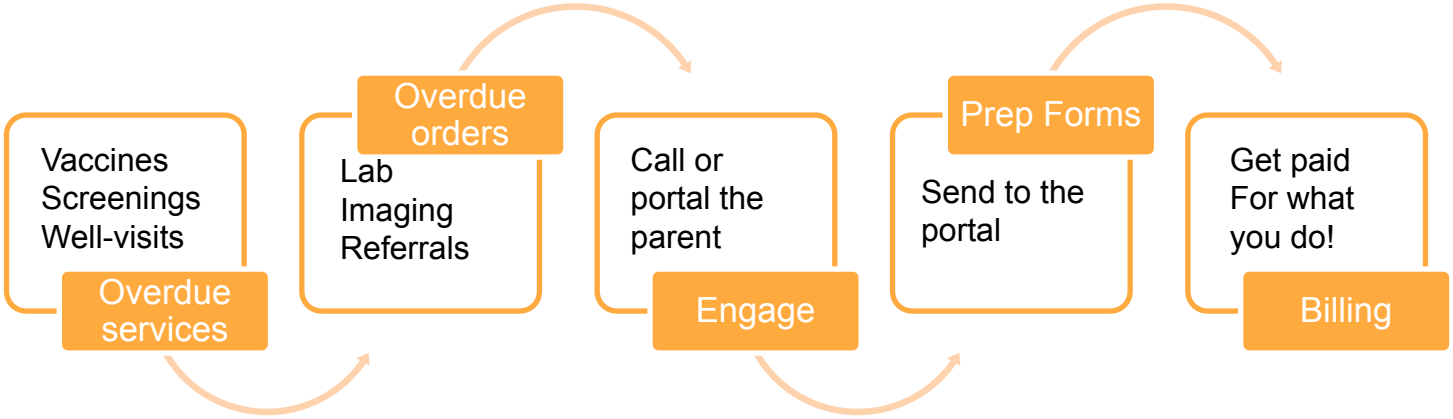
Appointment Book, Schedule Screen, and Huddle Sheet



Appointment Date	Appointment Time	Patient Age at Appointment	Patient DoB	Patient PCC #	Patient Name	Patient Sex	Appointment Reason	Appointment Note
07/13/2023 9:30am	9:30am	13y 3m	03/14/2010	3235	Taylor, Patrick	Male	12yr - 13yr Well Visit	PHQ-9, CRAFFT, HPV, Tdap, MCV



Pre-Visit Prep Process



Pre-Visit Prep Processes Live Demonstration

Huddle Sheet Functionality

- Review Appointment Notes
- Check for Care Plans
- Review Patient Flags
- Quick daily financial view

Same-day/sick-visit prep

- Receptionist to ask the ”why” of the visits and document in the appointment note field
- “Sick” is not a descriptive appointment note
- Fever & vomiting for the last 24-hours gives details
- Allows provider to pull correct protocol
- Protocols can be configured with standard labs/testing
- Point of care testing can be completed before a provider enters the room

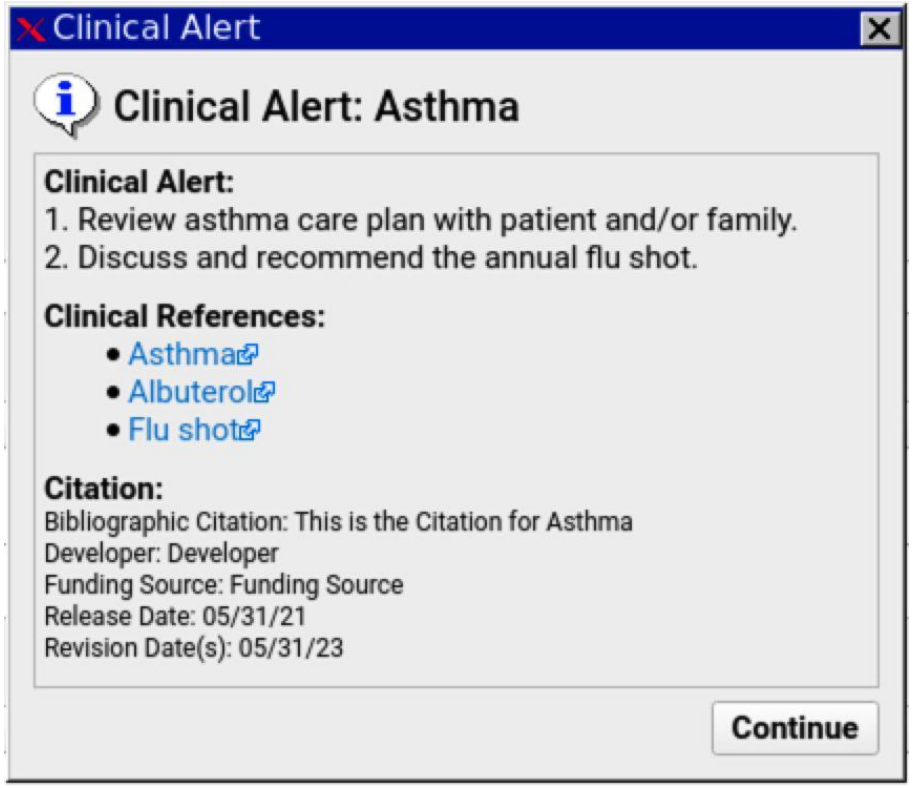
Getting the sick patient out of the office faster

Scribe Workflow

- Start an encounter based on visit type
- Family history, patient history, social history, medication summary can be notated as normal, until the child is in front of the scribe
- ROS and the physical examination can be noted as normal until the child is in front of the scribe
- The scribe will verify any outstanding orders [labs, imaging or referrals] are completed or properly followed up on
- Front office verifies billing information

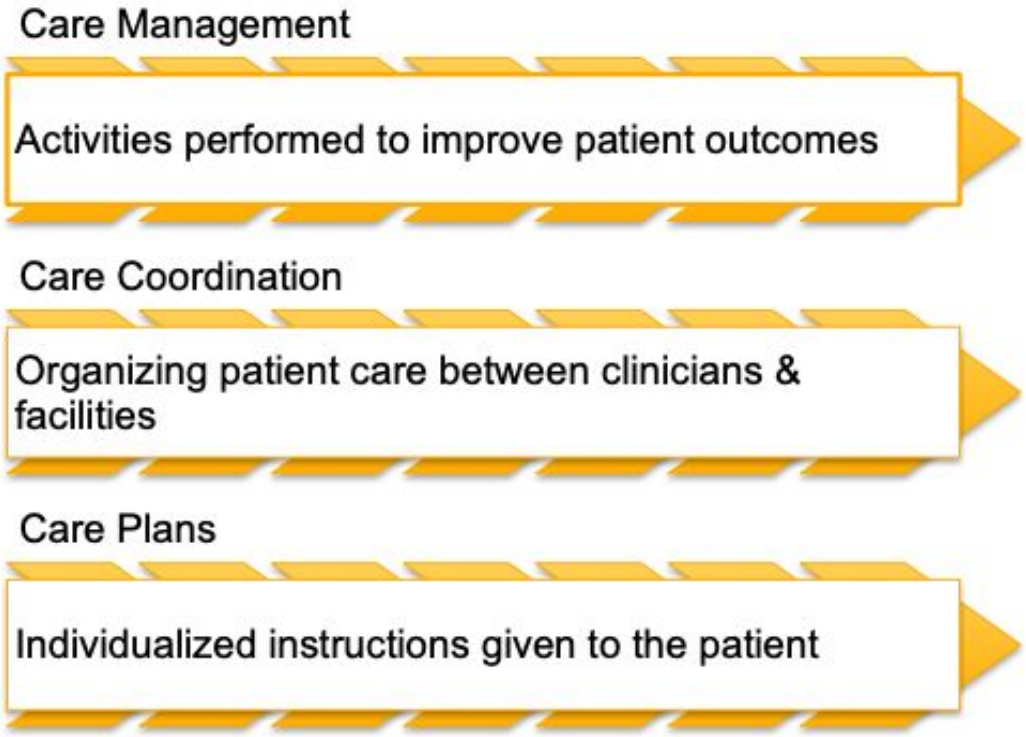
PCC Clinical Alerts

- Manageable reminders for identified complex patients
- Parameters are customizable
- 1st step of pre-visit prep!



Care Management

Care Management Terminology



Care Plans

- What is a care plan?
  - Individualized instructions to accomplish goals between visits
- Why is it needed?
  - Patients forget what the provider says
  - Accountability

Patient Criteria for Care Management

YES

- Food allergies + asthma with EpiPen & medications
- In need of home health or medical equipment
- Cardiac patient with specialist coordination
- Depression + ADHD & multiple medications

NO

- One-time constipation
- One-time ear infection
- Well-controlled intermittent asthmatic
- Acute illness [e.g., flu, COVID, strep, stomach virus]
- Manageable acne or eczema

Care Plan Components

YES

- Specific to child & concern
- Goals
- Barriers & ways to overcome
- Care team contact info
- Relevant resources
- Given in the preferred modality

NO

- Medical jargon & acronyms
- Providing only the clinical summary
- Including old information/concerns
- Not involving the family in creating care plan

Care Plans

- Configure to show Active Care Plans in Portal
- Add to your Protocols
- Utilize Snap-text to help reduce free-text
- Professional Contacts as Team Members
- Care plans by date report for easy tracking

PCC EHR Care Plan Live Demonstration

Care Plan

06/30/23

Goals

- Manage Healthy Weight and Increase Exercise | Referral to Nutritionist

Actions

- Weight management program
- Nutritional monitoring
- Weight monitoring
- Exercise regime

Next Steps

Discussed with patient and family the following treatment goals between now and the next visit:
-Removing all sweetened beverages from diet in favor of water
-Eating a diet rich in foods with low caloric density
-Limiting sedentary entertainment to < 2 hours per day
-Active exercise or rigorous play for >60 min/day
-Reduction in BMI
-Consider keeping a food diary or using an app for tracking food intake and weight goals
-Consider keeping an exercise diary or using an app for tracking activity and goals
-Referral to Karen Jones, Nutritionist at FAHC

Discussion barriers to meeting goals, such as:
-Limited access to healthy food sources
-Limited access to activities
-Lack of family involvement
-Sedimentary lifestyle
-Poor participation/involvement and encouragement from members of household

Discussed overcoming barriers:
-Discussed using federal food assistance programs (i.e. WIC, SNAP, local food pantry, school food programs)
-A family-wide focus on changing sedimentary behaviors and limiting screen time
-Finding resources in the community and/or school system for activities opportunities
-Joining a sport or club with physical activity
-Keeping all follow up appointments every three months, or sooner
-Provided Patient Education resources directly to Patient Portal

Care Coordination Notes (internal use)

Team Members

Karen Jones

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Benefits of the PCC Patient Portal

- Complex patients should always have portal accounts
- Active Care Plans are available on the portal immediately
- Configuration settings and Messaging Templates
- PCC Education Tool and Portal Documents

References

- https://learn.pcc.com
- https://patientcenteredsolutions.org/

What Questions Do You Have?

Later Viewing

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