



Sweet Forms O' Mine!

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Team Introductions

Bastien - Developer

Tori - Business Analyst

Bryan - Beta Coordinator

Tamsin - Quality Assurance

Dan - Designer

Tim - Product Owner

Ryan - Support Rep / Educational Content

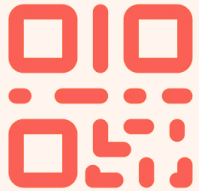
Session Goals

1. Learn how the new forms tool can benefit your practice
2. See what's coming with the new forms tool
3. Have an opportunity to provide input on the direction of our development with this tool

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.

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Have you migrated to the new patient forms tool?

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Creating and Managing Forms in PCC EHR

Once PCC Support has enabled the Forms Configuration tool and migrated your existing forms, you can:

- Build and preview your own forms with headers, variables and response prompts
- Generate these new forms

Read about existing patient form functionality on Learn:

<https://learn.pcc.com/help/create-and-manage-forms/>

Recent Updates to Patient Forms

- Practice header configuration
- Encounter-specific variables
- Preview .pdf forms

What's Coming With 9.7

Encounter Variables

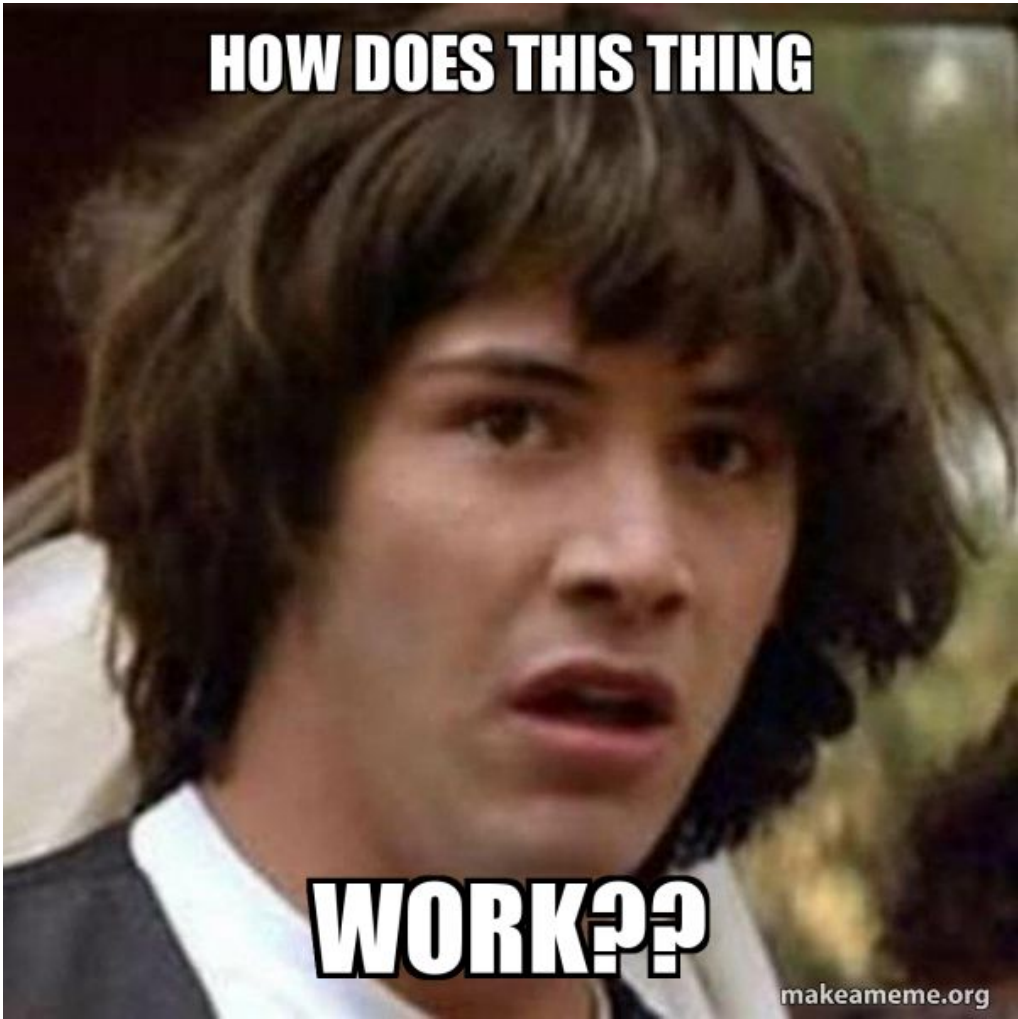
- Includes variables for encounter provider, location, date, time, etc
- Includes variables for encounter vitals (height, weight, BMI, BP, etc)

Signature Library

- Users can create and manage a signature library for providers
- Signatures can be included within standard forms
- Signature permissions

Snap Text and Special Characters

- Users will be able to trigger snap text when filling responses on forms
- Use special characters on standard forms and responses



HOW DOES THIS THING

WORK??

makeameme.org

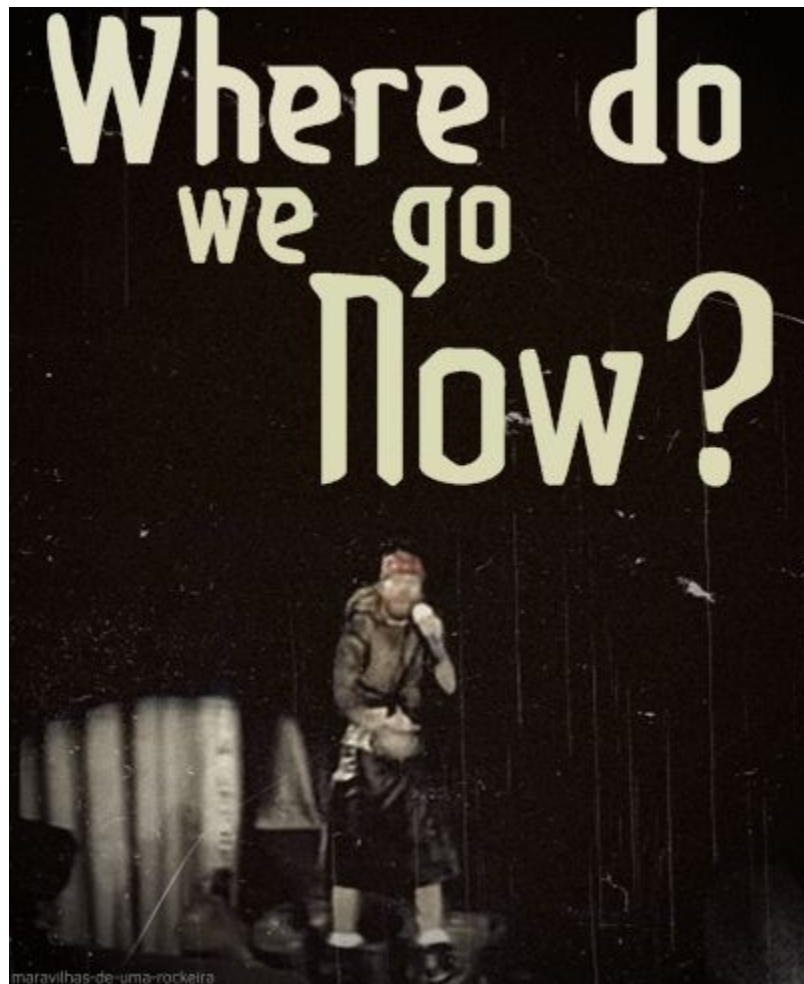
Migration Process

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/>



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Future Development

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

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Please rank these forms features in order of importance to you (highest importance on top)

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What are the must-have features your practice needs in order to make the switch to the new forms tool?

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Session Takeaways

1. With signature, snap text and other functionality coming this month, now may be the time for you to switch to the new tool
2. Join us tomorrow (Thu) from 1:15-2:15 to learn more about the migration process and experiment with the product on your own

Session Takeaways

Any further questions or comments to share?

Email us at: DT6@pcc.com