

What's New and What's Next

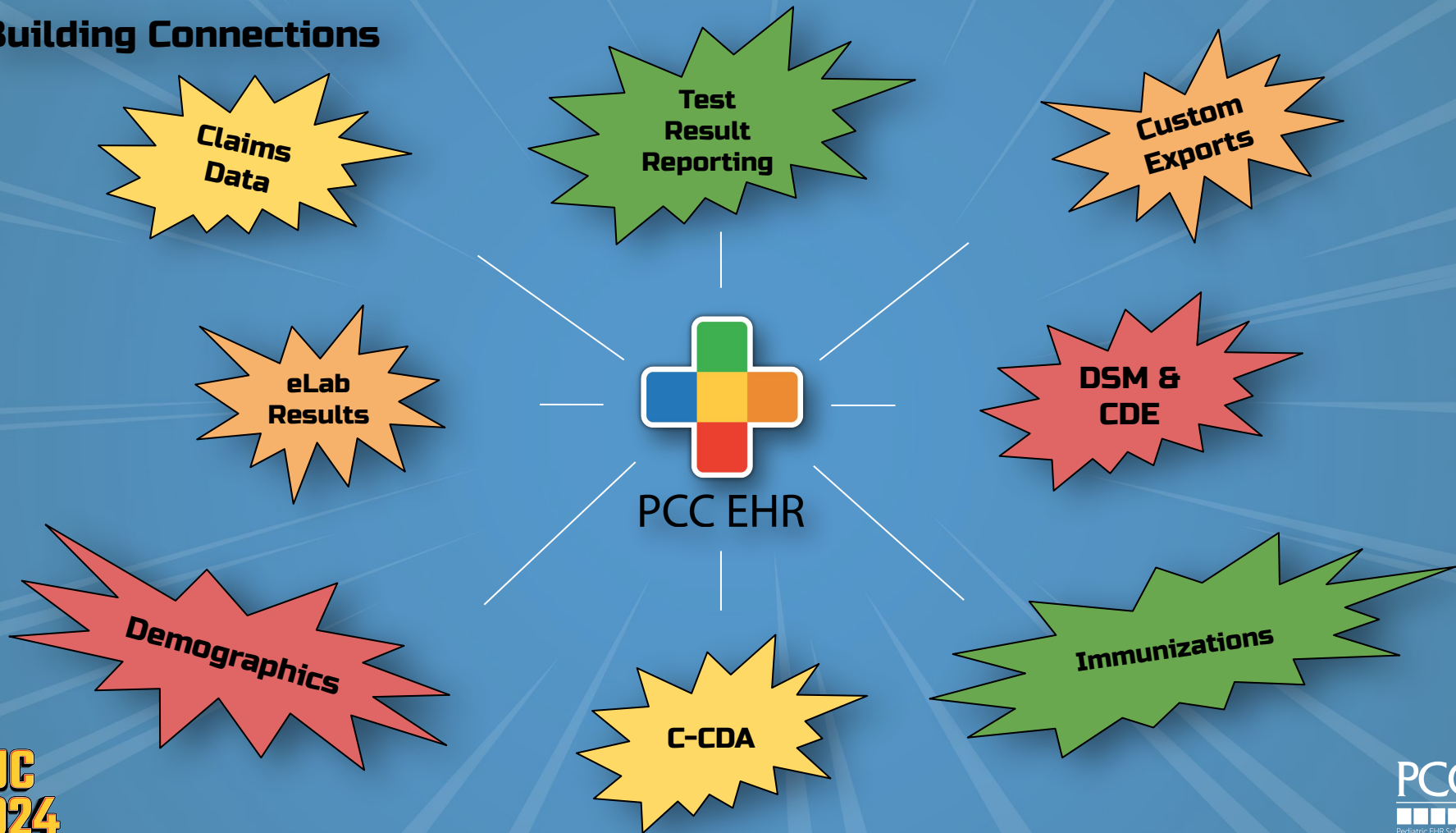
**UC
2024**

Clinical Data Exchange (CDX)

**Jennifer Marsala
Morgan Ellixson-Boyea**

**UC
2024**

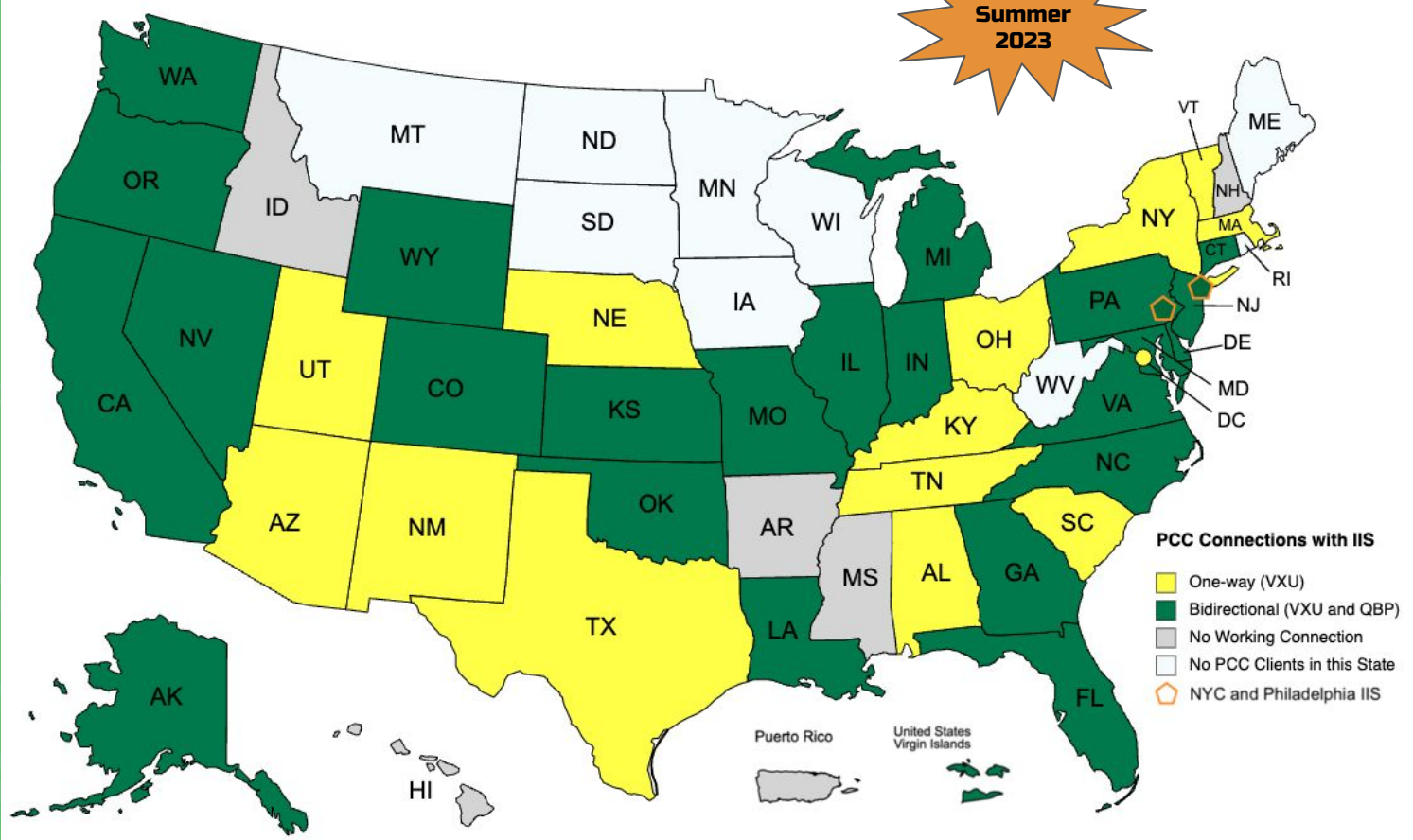
Building Connections



**UC
2024**

Immunization Registry Connections

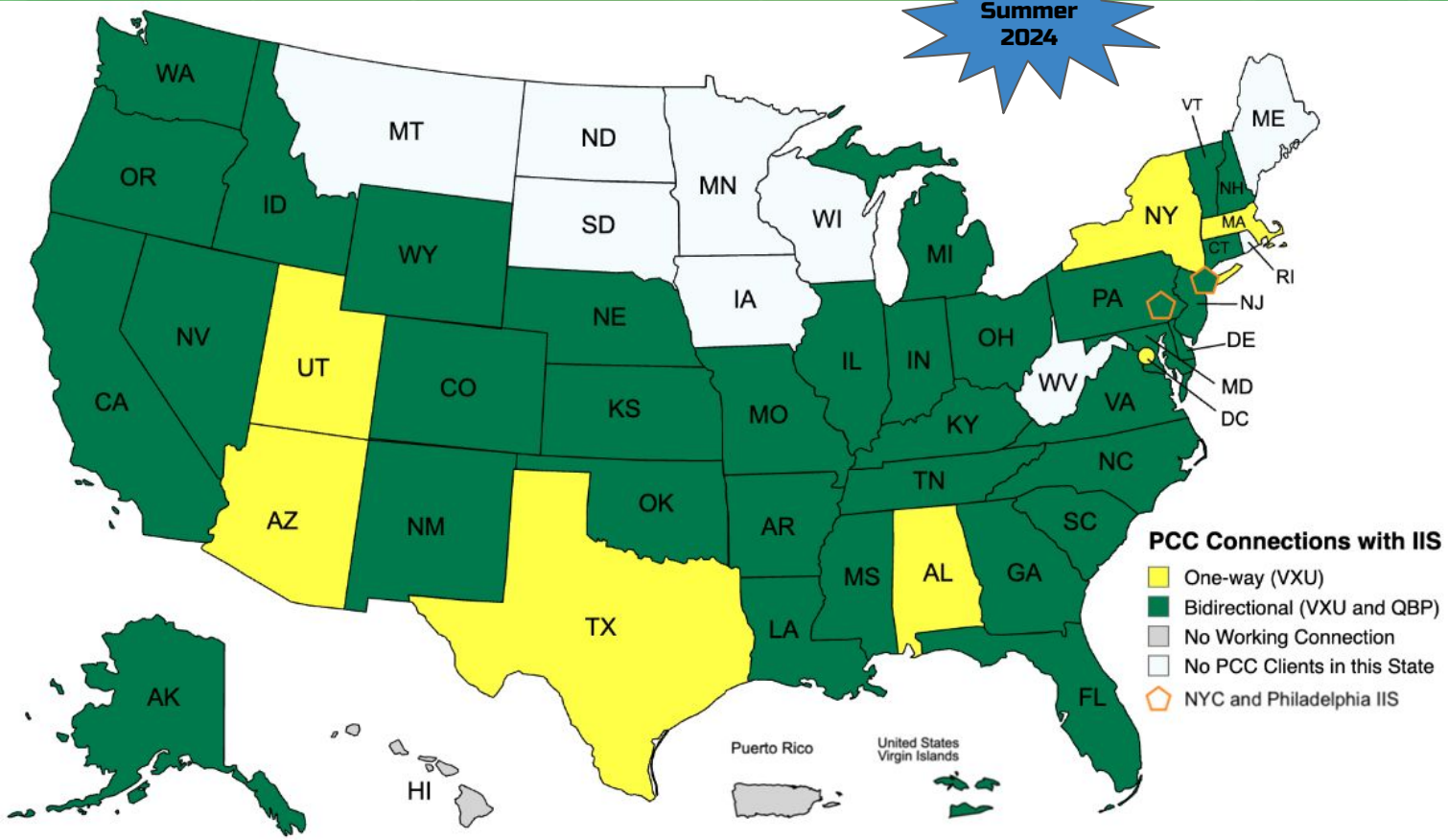
Summer 2023



UC 2024

Immunization Registry Connections

Summer 2024



UC 2024

Immunization Conference Sessions

A white, jagged, starburst-shaped graphic with the word "BOOM" in bold black capital letters inside it.

BOOM

Immunization Registry Walk-In Clinic

Have a question related to your state immunization registry? Join PCC's interoperability team members in the open lab!

Thursday, 1:15-2:15PM in Mt. Princeton

Immunization Forecasting

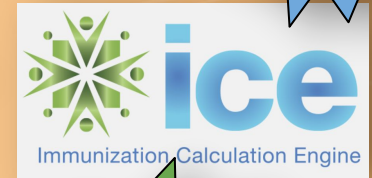
All PCC Clients transitioned to ICE last fall!



PCC's New
Forecasting
Partner



PCC EHR



Leverages
CDSi

Relies on
ACIP & CDC
Recommendations

- Accurate forecasts
- Faster performance
- Timely, tested updates

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Immunization Conference Sessions



From Configuration to Refrigeration: Vaccine Management 101

Romni Palmer, Jen Perren, Jim Smith, Brian Kennedy

Boost your knowledge of everything required to properly configure your system and manage your vaccine inventory. Immunization super users across PCC will join forces to share best practices around billing, the Vaccine Lot Manager, and more!

Wednesday, 3-3:55PM in Mt. Columbia

From Giving the Shot to Reconciling Lots: Vaccine Administration 201

Romni Palmer, Jen Perren, Jim Smith, Brian Kennedy

An in-depth exploration of workflow related to administering vaccines, connecting to your state immunization registry, obtaining the perfect school form, and so much more!

Thursday, 10AM-12PM in Colorado A

Chart Export



PCC EHR File Edit Reports Tools Configuration

- Chart Export
- Health Information Summary
- Patient Education
- Patient Visit Summary
- Summary of Care Record
- Clinical Quality Measures
- Lab Test Report
- Meaningful Use Measures
- Patient Lists
- Patient Reminders
- PCC EHR Audit Log
- Phone Encounter Performance
- Vaccine Lot Report
- Practice Vitals Dashboard
- Report Library

Chart Export Elaine "Laney" Benes 12 yrs, 11 mos 04/20/11 F

Export all charted information and documents for this patient to an encrypted file. This process may take a few minutes to complete.

Please provide the encryption password to the recipient.
The password will not be displayed again.

Encryption Password: **XuzlfdQzTSuiqEb**

Include Confidential Content

- Confidential Diagnoses
 - Victim of child neglect
- Confidential Orders
 - Ear Piercing - Both Ears
- Confidential Components
 - Confidential Notes

Include Sexual Orientation and Gender Identity (Privacy Status: **Private**)

Include Portal Messages (**May contain sensitive information**)

Portal users with messages for this patient:

- Jen Marsala
- Elaine Benes (Self)

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ONC-ACB Health IT Certification

In May, PCC 10.0 was designated 2015 Edition Certified EHR Technology!



PCC EHR

PCC EHR appears once again on the Certified Health IT Product List

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Clinical Document Exchange



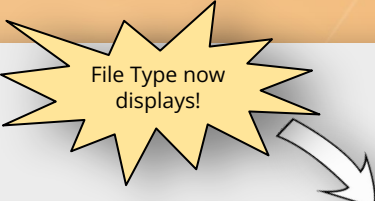
PCC Pediatric Test Associates (scone)

Dates: All From to

Include previously retrieved documents
 Include deprecated documents
 New filter! Include unsupported file types

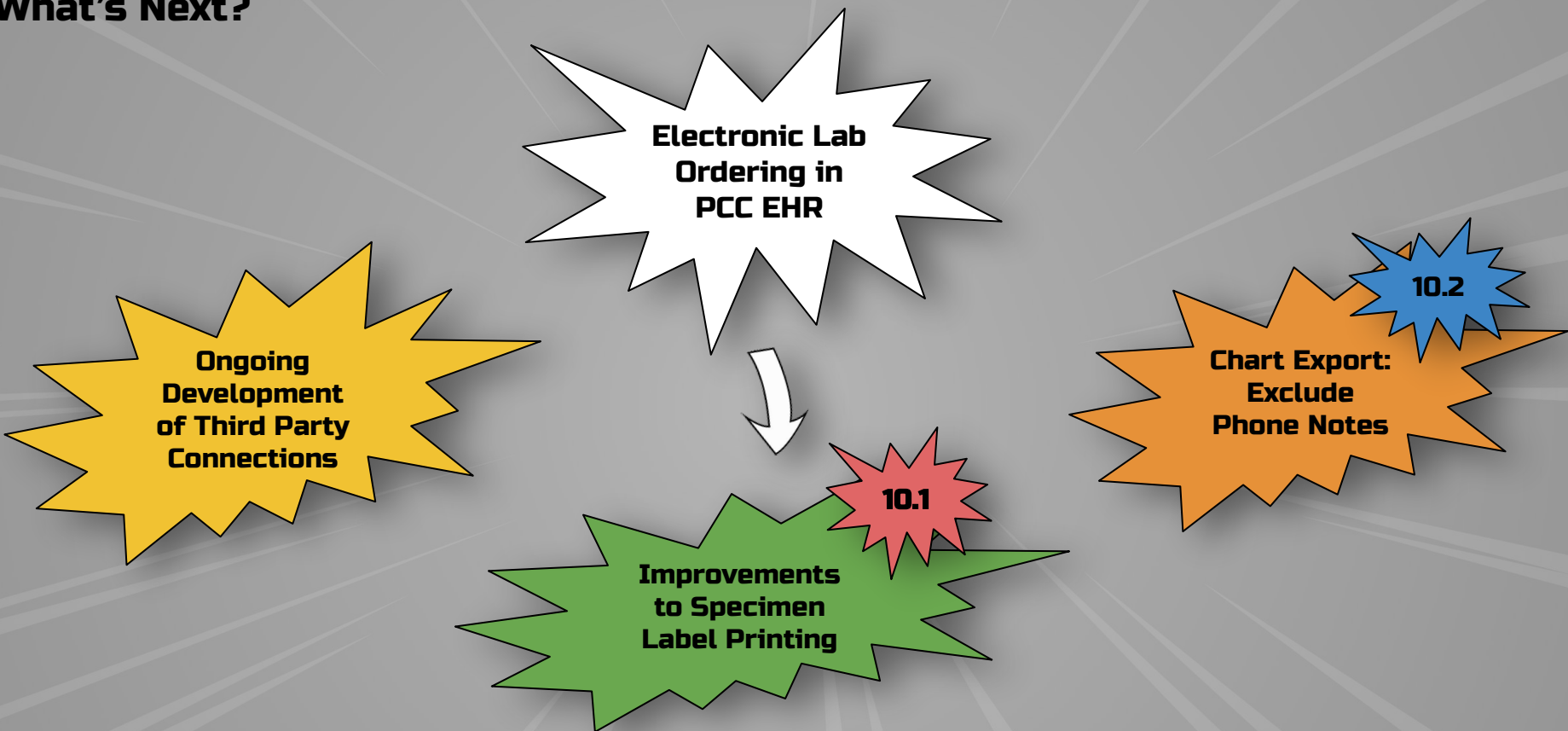
George Costanza Last updated: 04/16/24 9:42am

	Document Date	Document Name	File Type	Status	Last Retrieved
<input checked="" type="button" value="Retrieve"/>	04/12/2024	Summary of Episode Note	CCDA	Approved	never
<input type="button" value="Retrieve"/>	04/02/2024	Media.schema	application/octet-stream (Unsupported)	Approved	never
<input type="button" value="Retrieve"/>	04/02/2024	foo	text/plain (Unsupported)	Approved	never
<input checked="" type="button" value="Retrieve"/>	04/02/2024	Screen Shot PNG	PNG	Approved	never
<input checked="" type="button" value="Retrieve"/>	04/02/2024	IMG_5366	JPEG	Approved	never
<input type="button" value="Retrieve"/>	04/02/2024	Pasted Graphic	TIFF (Unsupported)	Approved	never
<input checked="" type="button" value="Retrieve"/>	04/02/2024	album_2023-11-17_11-48-53	GIF	Approved	never
<input checked="" type="button" value="Retrieve"/>	04/02/2024	pdf_form	PDF	Approved	never



Retrieve PDFs, images, and other common file types from organizations you query!

What's Next?



Specimen Label Printing

11-14 Yr Well - (client v. I) Bright Futures

Laney "Laney" (Elaine) Benes 12 yrs, 11 mos 08/12/11

Print Labels Generate Requisition



Print Specimen Labels

Changes made to specimen collection will be reflected in the orders.

Amylase Elab

Print 1 label(s)

Specimen Collected: By Jen Marsala 07/17/24 9:21 AM

Specimen Source Unspecified enter source notes

URINALYSIS, COMPLETE Elab

Print 1 label(s)

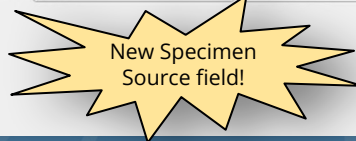
Specimen Collected: By Jen Marsala 07/17/24 9:21 AM

Specimen Source Urine clean catch

Benes, Elaine
DOB: 08/12/11
Collected: 07/17/24 09:21 AM

Benes, Elaine
DOB: 08/12/11
Collected: 07/17/24 09:21 AM
Source: Urine (clean catch)

Cancel Save + Print



Updates from the land of PCC eRx



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PCC eRx: A Year in Review



PCC eRx: A Year in Review



- ❁ Choose preferred status behavior when adding new pharmacies to patient charts
- ❁ Copy pharmacies across siblings
- ❁ Create custom nicknames for your pharmacies

PCC eRx: A Year in Review



- ❁ **View accurate and up-to-date prescription benefits while you prescribe (RTPB & ODF)**
- ❁ **See when an item in Medication History has an active prescription**
- ❁ **Specify which prescriptions to send a cancel message for**
- ❁ **Reroute prescriptions to a different pharmacy with one click**

PCC eRx: A Year in Review

Other Important Improvements & Bug Fixes

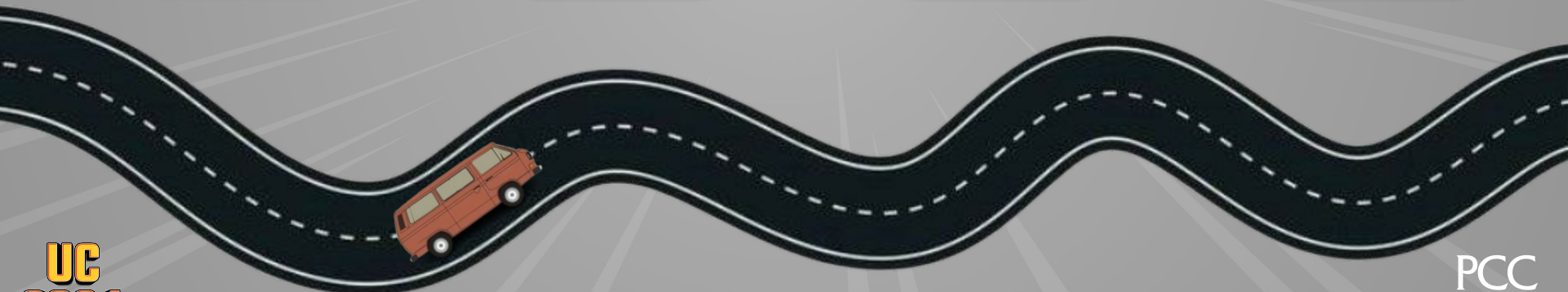
- ❁ **Minimum commercial package size suggested for liquids and drops**
- ❁ **Only show safety alerts for *active* diagnoses and medications**
- ❁ **Off-market medications? No Problem!**
- ❁ **No more trouble with Patient Takes No Medications button**
- ❁ **Ordering Provider saves and sends properly for all prescriptions**
- ❁ **Weight-based Dosing for Augmentin & Bactrim - fixed (again!)**



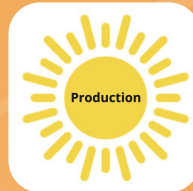
What's Next for PCC eRx?




What's Next for PCC eRx?



Prior Authorization - Current Experience



AMPHETAMINE-DEXTROAMPHETAMINE (ADDERALL EXTENDED RELEASE 24 HOUR CAPSULE) 


Instruction Only

Qty: 1 to 10 mg capsule,extended release 24hr ▾

PO ▾ (show all routes) every morning ▾ (show all frequencies)

PRN

Adjustments:



Prescription:

Days Supply: 30 DAW


Dispense: 30 Capsule(s) ▾

Number of Refills: PRN

Date to Fill: Create 3 month supply

Prevent Renewal Requests:

Follow up provider:

Real-Time Pricing 

Covered with restrictions

Prior Auth Required

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



* Images from current PCC eRx without ePA functionality

What's Next for PCC eRx: Electronic Prior Authorization



AMPHETAMINE-DEXTROAMPHETAMINE (ADDERALL EXTENDED RELEASE 24 HOUR CAPSULE) 


Instruction Only

Qty: 1 to 10 mg capsule,extended release 24hr ▾

PO ▾ (show all routes) every morning ▾ (show all frequencies)

PRN

Adjustments:



Prescription:

Days Supply: 30 DAW


Dispense: 30 Capsule(s) ▾

Number of Refills: PRN

Date to Fill: Create 3 month supply

Prevent Renewal Requests:


Follow up provider:

Real-Time Pricing 



Covered with restrictions

Prior Auth Required

Start ePA Expedited





- ❁ Work on ePA began in December 2023
- ❁ Partnership through Surescripts
- ❁ PCC EHR Release Date - TBD
- ❁ Feedback requested!

Start/Stop	Prescription	Prescriber/Agent	Rx Details
05/30/2024 06/28/2024	 Relexxii 36 mg tablet extended release 24hr (methylphenidate HCl) Schedule II 1 tablet(s) By Mouth every day 30 Tablet(s) 0 Refill(s)	MORGAN ELLIXSON-BOYEA	SN: 35 ePrescribed Brooklyn @ Gates Pharmacy
Prior Authorization: <input type="text" value="Start ePA"/> 			

What's Next for PCC eRx: Electronic Prior Authorization



Prescription History







	Start/Stop	Prescription	Prescriber/Agent	Rx Details
 	05/21/2024 06/19/2024	<input checked="" type="checkbox"/> Adderall 10 mg capsule,extended release 24hr Schedule II 1 capsule(s) By Mouth every day 30 Capsule(s) 0 Refill(s) Prior Authorization: In progress ←	DEWEY HOWELL	SN: 35 ePrescribed <i>Brooklyn @ Gates Pharmacy</i>

Page: 1

View status
of Prior
Auth inside
PCC eRx!

Medication History Medication History not yet reviewed

Group By: Indication Class Generic med name None Display: Active Only Active & Inactive

Medication	Instructions	Source
      AMPHETAMINE-DEXTROAMPHETAMINE (ADDERALL EXTENDED RELEASE 24 HOUR CAPSULE) 10 mg capsule,extended release 24hr <i>Active Rx</i> Prior Authorization: In progress ↑	1 CAPSULE(S) PO EVERY DAY	PCC eRx

Medication History Comments:
No comments entered

Patient takes no Meds Med Hx is unknown or incomplete

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What's Next for PCC eRx: Electronic Prior Authorization

Medication History Last Modified by Dewey Howell 05/21/24 2:35pm Display: All Statuses ▾

Status	Medication	Instructions	Start	Stop
Active	AMPHETAMINE-DEXTROAMPHETAMINE (ADDERALL EXTENDED RELEASE 24 HOUR CAPSULE) 1 x 10 mg capsule,extended release 24hr Prior Authorization: In progress ←	1 cap PO every day; by Dewey Howell	05/21/24	

Last reviewed by PCC PCC 05/30/24 12:21pm

View status of patient-specific Prior Auth in PCC EHR Medication History & Patient Portal

And search for any Prior Auth from Rx Queue!

PCC eRx Rx Queue My Settings RxLogs Audit Log Administration

Prior Authorizations

Current (1) Sent to plan Search

Search:

Sign Out My Kid's Chart Settings

Welcome Morgan Elixson-Boyea

Medications

Active

Adderall (10 mg Sustained Release 24 hour Capsule)

1 x 10 mg capsule
extended release 24hr
Instructions: 1 Sustained Release 24 hour Capsule By Mouth every day
Start: 05/21/24
Prior Authorization: In progress ↑

Allergies

None

Problem List

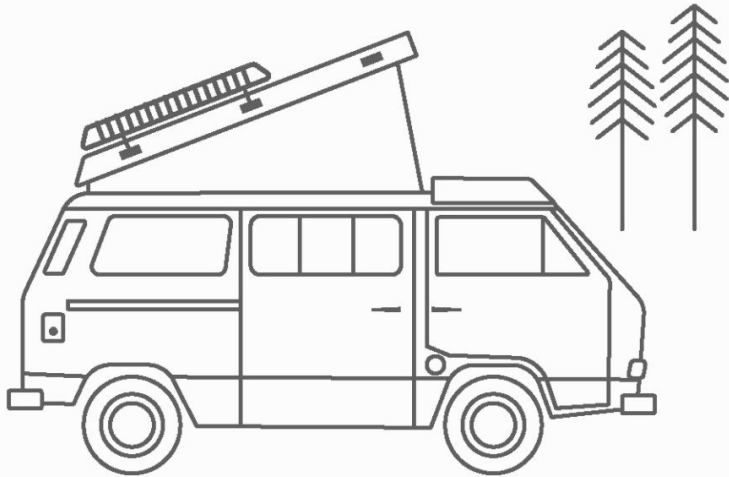
None

Immunizations

None



Arriving ahead of schedule: Prescribing from pocketPCC



Prescribe from pocketPCC
Early 2025

What's Next for PCC eRx?



This Week at UC 2024

Let's Talk about PCC eRx!

Wednesday 7/17

***Electronic Prior Authorization:
The Next Big Thing for PCC eRx***

with Dewey Howell, MD, PhD
Mt Columbia @ 115pm MDT

eRx Walk-in Clinic

Hosted by eRx Team
Mt Princeton @ 3pm MDT

Friday 7/19

***What's Next for PCC eRx
(Review of New Features, Roadmap, & More!)***

With Morgan Ellixson-Boyea, CPhT, CSPO
Mt Columbia @ 950am MDT

eRx Walk-in Clinic

Hosted by eRx Team
Mt Princeton @ 115pm MDT

GETTING PAID

***PRESENTATION BY KELSEY
TAVERAS***

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2024**

UNBELIEVABLE!!

WHAT'S NEW 9.7 RELEASE



Submission Needs Correction (46) Log

Claims - Needs Correction

The claims below could not be submitted and require one or more corrections.

Status: Needs Correction

Search Filter:

Claim Status	Patient	Date of Service	Insurance Plan	Reason
Needs Correction	Hostettler, Amanda (PCC# 2482)	07/24/19	Aetna PPO \$0	The policy "Aetna PPO \$0" is not active for the date(s) of service.
Needs Correction	Flintstone, Pebbles (PCC# 3336)	12/23/15	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.
Needs Correction	Orlando, Rodger Growth (PCC# 4017)	01/08/19	Aetna HDHP	The policy's certificate number has fewer than 2 characters.
Needs Correction	Flintstone, Dino (PCC# 3335)	07/24/19	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.
Needs Correction	Flintstone, Pebbles (PCC# 3336)	08/08/19	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.

For each claim that can't be submitted, you can review the patient name, DOS, insurance plan, and the reason

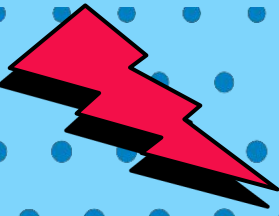


Validate Delete Claim Close



UC 2024

WHAT'S NEW 9.7 RELEASE



Insurance Payments

Posting

Patient Flags:
Account Flags:

Insurance Payment:

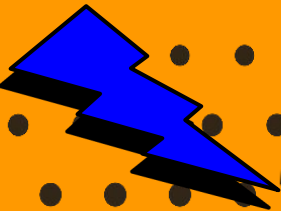
Transaction Date: 06/24/24
Check Number:
Payment Type: Ins Pmt
Adjustment Type: Ins Adj
Current Policy: Capital Blue Cross \$20 OV&WC-Other
Next Policy: Personal

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount
03/29/24	99214	87.00	20.00	67.00	payment	adjustment	balance	3	
Totals:		87.00	20.00	67.00					



WHAT'S NEW 9.8 RELEASE



You can review payment history as you post insurance payments

Insurance Payments

Abigail Addington 9 yrs, 11 mos 09/19/13 F

Posting History (Jeffrey Addington)

Patient Flags: Chronic, Burlington Pediatrics
Account Flags:

Insurance Payment:

Transaction Date	Check Number	Payment Type	Adjustment Type	Current Policy	Next Policy
09/11/23	11111111	Ins Pmt	Ins Adj	Capital Blue Cross \$10 OV&WC-Other	Personal

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount
04/25/23	99393	95.00	10.00	85.00	payment	adjustment	balance	3	



WHAT'S NEW 9.8 RELEASE



Insurance Payments Abigail Addington 9 yrs, 11 mos 09/19/13 F

Posting: History (Jeffrey Addington)

Account Balances
Jeffrey Addington (Account # 1238)

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	207.00	0.00	207.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

▶ Encounters with Outstanding Personal Balances

Payment History Search Filter:

Jeffrey Addington (Account # 1238)

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
▼ 07/12/23	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
	3.41	Ins Adj - Capital Blue Cross			0.00
81.59 Ins Pmt - Capital Blue Cross Applied to:					
04/25/23	81.59	Abigail Addington 99393	Well Child 5-11 yrs	Elizabeth Mary Casey, MD	
3.41 Ins Adj - Capital Blue Cross Applied to:					
04/25/23	3.41	Abigail Addington 99393	Well Child 5-11 yrs	Elizabeth Mary Casey, MD	
▶ 05/14/23	0.00	Ins Pmt - Capital Blue Cross			0.00
▶ 04/24/23	10.00	TOS Cash Payment			0.00
▶ 04/18/23	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00
	18.84	Ins Adj - Capital Blue Cross			0.00

[Print Receipt](#) [Refund Credits](#) [Reverse Payment](#) [Edit](#) [Close](#)

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WHAT'S NEW 9.8 RELEASE

Insurance Payments Andrew Quarry 7 yrs, 6 mos 02/18/16 M

Posting:

Patient Flags:
Account Flags:

The Insurance Payments tool will remember check details so you can easily post payments for all the encounters on an ERA

Insurance Payment:

Transaction Date	Check Number	Payment Type	Adjustment Type	Current Policy	Next Policy
09/10/23	11111111	Ins Pmt	Ins Adj	Health Assurance Healthstyles \$10	Personal

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount
08/15/23	99213	56.00	10.00	46.00	payment	adjustment	balance	3	





WHAT'S NEW 9.9



Payments

Account Finder Patient Finder

Patient Finder

orlando

Find

Results for Name: orlando

Last	First	DOB/Sex	Age	PCC #	PCP	Patient Flags
Orlando	Jasper	01/07/21	U 3y	4019		
Orlando	Katie "Documents"	07/08/23	F 6m 1w	4014		New Patient
Orlando	Luke	06/01/23	M 7m 2w	2527		
Orlando	Millie "Mill" Norton	04/09/21	F 2y 9m	4018	Casey Burlington Pediatrics	
Orlando	Oliver "Olli" James	04/02/20	M 3y 9m	4015	Casey Records	

Close

Select

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WHAT'S NEW 9.9



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

- Claims
- Electronic Remittance Advice**
- Immunization Registry Response Viewer
- Insurance Eligibility
- Insurance Payments
- Patient Portal Administration
- Payments
- Print Visit Forms

Electronic Remittance Advice

The source of the information displayed is the payor. Search:

Remittance	Processed	Payor	Check#	Amount
11/29/23		AmnHealth, Inc	0000000000	0.00
11/29/23		AmnHealth, Inc	0000000000	123.65
11/29/23		Amn	0000000000	70.00
11/29/23		United Health Plans LLC	0000000000	336.78
11/29/23		United Health Plans LLC	0000000000	284.37
11/29/23		United Health Insurance Inc	0000000000	7263.17
11/29/23		United Health Insurance Company	0000000000	210.50
11/28/23		Amn	0000000000	229.73
11/28/23		UnitedHealthcare	0000000000	332.29
11/28/23		UnitedHealthcare	0000000000	1308.77
11/28/23		Amn	0000000000	121.87
11/28/23		AmnHealthcare of New Jersey Inc	0000000000	319.05

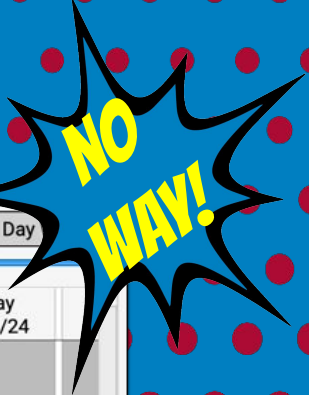
Status: Unprocessed

Page Up Page Down Page 1 / 1 View Close



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WHAT'S NEW 10.0



Appointment Book

Provider: Today Location: Week of Sunday, 04/21/24

Schedule Appointment Add Block

Abigail Addington 10y 3m 01/01/14 F	Sunday 04/21/24	Monday 04/22/24	Tuesday 04/23/24	Wednesday 04/24/24	Thursday 04/25/24	Friday 04/26/24
Sick Call 15 min						

Patient Details
Abigail Addington 10 yrs, 3 mos 01/01/14 F

Insurance Eligibility
Date: 04/24/24
PCP:

Horizon
Copoly: \$20.00 Cert: 0000 Group: 0000 Subscriber: Jason
Eligibility Response: Eligibility Undetermined [Request Eligibility](#)

Patient Demographics

Abigail Addington Date of Birth: 01/01/14 Sex: Female	Patient Information Patient Flags: PCP: Care Center:
--	--

Birth History
GA at Birth: Undetermined
Multiple Birth: Undetermined

Race, Ethnicity, and Preferred Language
Race: White
Ethnicity: Not Hispanic or Latino
Pref. Language: English

[Edit](#) [Close](#)

Request eligibility from the Patient Details window while scheduling



UC 2024

FANTASTIC!

WHAT'S NEW 10.0



Account Balances

Print

Jeffrey Addington (Account # 1238)

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	207.00	0.00	207.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

▼ Encounters with Outstanding Personal Balances

Abigail Addington (PCC# 2503)

Mark Williams, M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
10/09/23	Missed Appointment Fee	15.00		0.00		15.00
10/09/23	Missed Well Visit	0.00		0.00		0.00
		15.00	0.00	0.00	0.00	15.00

Nathaniel Addington (PCC# 3087)

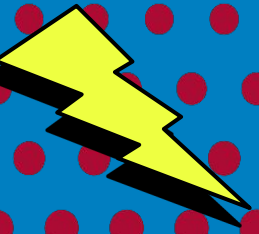
Mark Williams, M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
09/20/23	OV Expanded Focus	56.00		0.00		46.00
09/20/23	TOS Check Payment		10.00			
		56.00	10.00	0.00	0.00	46.00

Abigail Addington (PCC# 2503)

Mark Williams, M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
09/20/23	OV Detailed H&E	87.00		0.00		87.00



UC 2024

FACTS!!
FACTS!!

CHANGE HEALTHCARE

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2024

WHAT'S NEW 10.0



Submission Needs Correction (6) Log Holds Delay

Needs Correction - Rodger Growth Orlando (PCC# 4017) Status: Needs Correction

Date of Service: 02/23/23
Insurance Plan: Aetna HDHP
Reason: The policy's certificate number has fewer than 2 characters.
Instructions: Edit the patient's policy and enter a valid certificate number.

▶ Patient Demographics
▶ Account Demographics
▶ Insurance Policies

Demographics Documents Billing History Correct Mistakes Previous Next Close

Callout: The reason the claim can't be submitted, along with suggested fixing instructions

KAPOW!

WHAT'S NEW 10.0

SUPER!

Electronic Remittance Advice

The source of the information displayed is the payor.

Search:

Remittance	Processed	Payor	Check#	Amount
04/05/24		Cigna	202020	1343.05
04/05/24		United	1111111	192.30
04/04/24		United	1111112	255.47
04/04/24		United	1111114	175.02
04/04/24		United	1111116	0.00
04/04/24		United	1111118	171.76
04/04/24		United	1111120	100.33
04/04/24		United	1111121	109.50
04/04/24		United	1111122	121.87
04/04/24		United	1111124	0.00
04/04/24		Oxford	3030303	78.54
04/04/24		Oxford	3030304	207.63
04/04/24		Oxford	3030305	83.18

Status: Unprocessed

Page Up

Page Down

Page 1 / 1

Process

View

Close



**UC
2024**

WHAT'S NEXT... 10.1 AND BEYOND

- ★ **EDIT CHARGES IN THE EHR**
- ★ **BILLS AND E-BILLS IN THE EHR**
- ★ **GENERATE A SINGLE STATEMENT IN THE EHR**
- ★ **ABILITY TO ENTER A TRANSACTION DATE IN THE ERA TOOL DURING PROCESSING**
- ★ **INSURANCE TABLE**
- ★ **PROCEDURE TABLE**
- ★ **PROCEDURE NAMES IN THE INSURANCE PAYMENT TOOL**
- ★ **SPECIAL CASES FILTER IN THE ERA TOOL IN THE EHR**
- ★ **REVIEW BILLING HISTORY FOR AN ACCOUNT IN THE EHR**

RELATED 2024 UC OFFERINGS

THURSDAY
10:05-12:05

FROM GIVING THE SHOT TO RECONCILING LOTS: VACCINE
ADMINISTRATION 201 BRIAN KENNEDY

THURSDAY 1:15-2:15

7 BILLING PITFALLS AND HOW TO
CORRECT AND AVOID THEM

HEIDI CHAMBERLIN

FRIDAY 9:50-10:50

ARE YOU CHARTING LIKE IT'S 2024?

BRIAN KENNEDY

WEDNESDAY 1:15-2:45

A DOCTOR AND A CODER WALK
INTO A PHONE BOOTH

JAN BLANCHARD AND DR. KREKAMEY CRAIG

WEDNESDAY 3:00-3:55

LEAVE BEHIND THE DARK SIDE: POST CHARGES,
PAYMENTS, SUBMIT CLAIMS, AND MORE IN PCC EHR!

BEN BRANDT

WEDNESDAY 4:10-5:10

GROW YOUR OWN EDI SUPERUSER

BRIAN KENNEDY

UC
2024

FRIDAY 1:15-2:15

BILLING DROP-IN LIVE!!!

**LIVE FROM THE STUDIO: BRIAN KENNEDY,
BEN, JAN, JAY, KRISTEN, KELSEY, OWEN,
MICHAEL AND TIM**

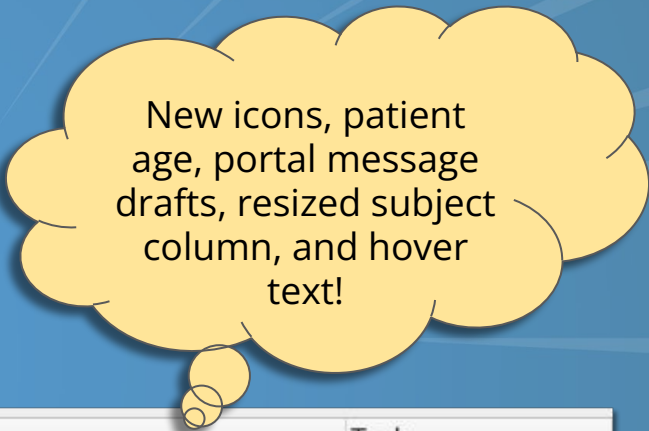
Care for Patients







Althea & Sasha

UC
2024

Messaging Queue Upgrades

- Changes to the Messaging Queue
- Portal Message Refactor for Improved Reliability
- Increased Visibility of Portal Message Drafts



Status	Date	Due	Patient	Age	Subject	Task
	05/29/24 2:05pm		Bauer, Garrett S P.A.	13y 9m	 Policies to sign in the portal	Draft Portal Message
 Joan Abbott, NP	10:51am	05/22/24	Johns, Robert	16y 3m	 Rash/Fever	Call Back Needed
	05/17/24 4:27pm	05/17/24	Clark, Jonathan	17y 6m	 Ibuprofin	FYI
	05/17/24 4:17pm	05/17/24	Lahan, Jordan	3y 8m	 Ear Tubes	Call Back Needed

Prevent Scheduling with Flags

Use Practice Preferences to set which flags limit scheduling.

Schedule Appointment Add Block

Anthony Smith 10y 05/04/14 M

Sick Call 15 min

Alfred Woodward, MD PCP: *Unassigned*

Winooski Pediatrics All Locations

mm/dd/yy 12:00am

Appointment Note

Telemedicine add Patient Link

Scheduling is prevented.
Flags: Dismissed

Clear Open Chart Details Save

Demographics **Anthony Smith** 10 years 04/05/14 M

Patient Demographics

Anthony Smith	Patient Information
Date of Birth: 04/05/14	Patient Flags: Dismissed , Referred by Another Physician, Burlington
Sex: Male	PCP: None
Birth History	Other ID:
GA at Birth: Undetermined	School:
Multiple Birth: Undetermined	Note:
Race, Ethnicity, and Preferred Language	Old PM ID #: 07232
Race:	Relation to Bill Payer: Son
Ethnicity:	
Pref. Language:	

Portal Display Name

Personalize portal communications and protect your staff's privacy by selecting a portal name.

Edit User Account

Account Information | Role Assignment | PCC eRx

User Information

First Name: * Joan

Middle Name:

Last Name: * Abbott

Suffix:

Professional Suffix: NP

Full Name: * Joan Abbott, NP

Short Name: * joan

Portal Display Name: * Custom **Nurse Joan**

PCC EHR Password

Username:

Password: * Custom

Confirm Password: *

[Back](#) **My Kid's Chart** [Reply](#)

Corey Pietro

Sex: Male
Birthdate: 08/21/11
Last Physical: 03/11/23

Subject: Flu Clinic This Weekend

Thu 05/30/24 10:45am

Nurse Joan

Drop by our office for our first flu clinic of the season this Saturday from 9-4. Hope to see you there!

Access to More Administrative Tools

Room Configuration

Room Configuration

Room
1
2
3
4
5
6
7
8
9
10

Checked In

- Scheduled 3
- Scheduled 4
- Scheduled 5
- Scheduled 6
- Scheduled 7
- Scheduled 8
- Scheduled 9
- Scheduled 10
- New

Add Delete Edit Close

Add or delete a room, or edit an existing room

Set permissions for Room Configuration and Chat Message Log in User Administration.

Room Assignment Within a Chart

Sick - Bright Futures

Quinn J. Farkas 13 yrs, 6 mos 07/05/10 M

Appointment Details

Visit Status: Arrived Room: -

Appt Time: 1/8/24 5:00pm

Arrival Time: 1/8/24 10:27am

Visit Reason: Sick Call

Patient Age: 13 yrs, 6 mos

Appt Location: Winooski Pediatrics

Appt Provider: Beverly Crusher, MD

Visit Summary: Print Decline

Reprint Visit Forms

Chat Message Log

PCC EHR Audit Log Chat Message Log

Chat Message Log

View messages sent and received in EHR Chat

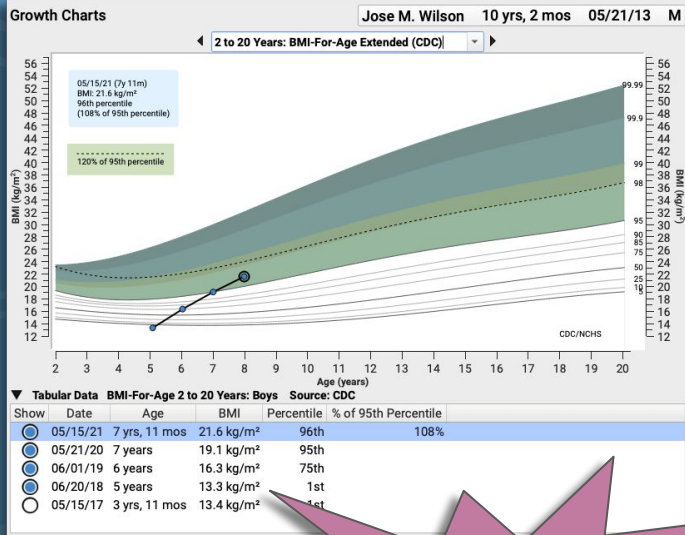
Reporting Period: 05/29/2024 12:00am to 05/29/2024 11:59pm

4 EHR Users

Messages: 6 Search Filter:

Date/Time	Sender	Recipient	Message Text
- Althea Beagley, Joan Abbott, NP (3)			
05/29/2024 03:10:54pm	Althea Beagley	Joan Abbott, NP	We are out of masks at the front desk. Do you have the key to the supply closet?
05/29/2024 03:12:26pm	Althea Beagley	Joan Abbott, NP	Nope. I don't have it. Check with the nurses.
05/29/2024 03:12:55pm	Joan Abbott, NP	Althea Beagley	I don't have it either.
- Nurses (3)			
05/29/2024 03:11:16pm	Althea Beagley	Nurses	Who has the supply closet key?
05/29/2024 03:13:15pm	Joan Abbott, NP	Nurses	Doesn't front desk keep it in the drawer?

Charting Improvements



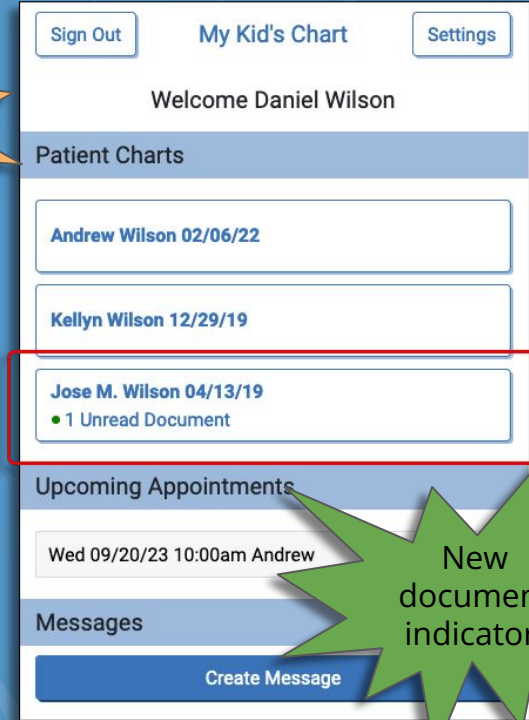
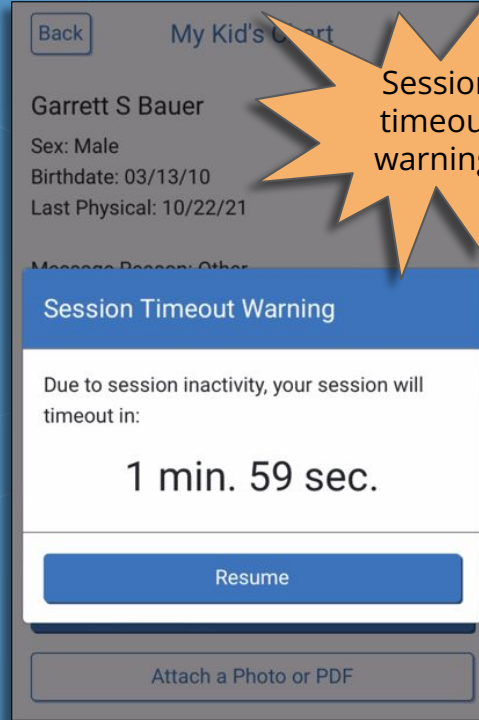
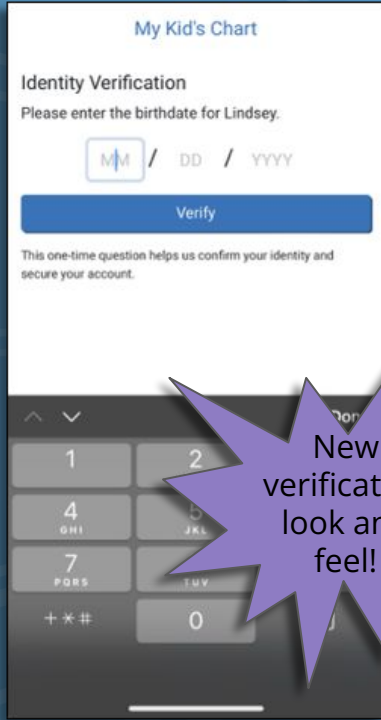
Past and future dates are more distinguishable in visit history.

Visit History Index Find Filter: Find Display: All History

Tasks	Date	Age	Protocols	Details	Provider	Docs
	10/10/23	11y	Anxiety/Depression	Dx: none	Crisher	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	

Extended BMI charts automatically display based on vitals entry.

Portal Improvements



Pre-Check-In Preparation


Link portal users to billing accounts to prepare for Pre-Check-In.

Insurance cards linked to policies will display in Pre-Check-In.

Link Images to Policies

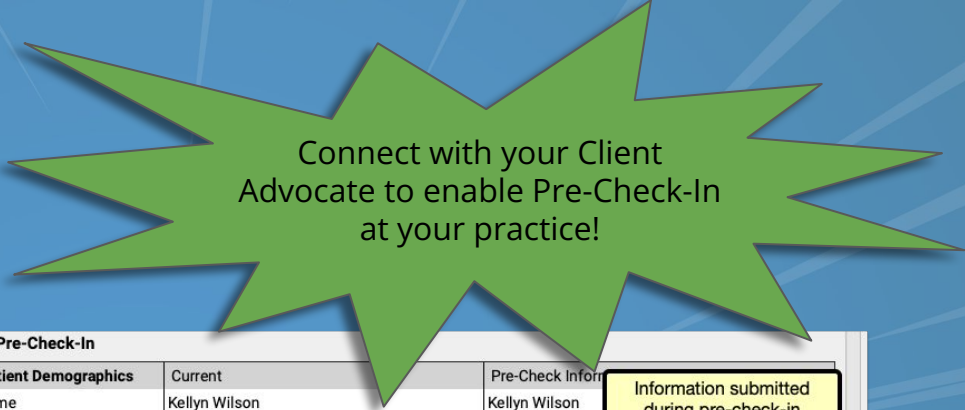
Associate Portal Users with Accounts

Demographics		Dana Wilson 11 mos, 1 wk 06/09/22 F	
First Name: <input type="text" value="Mark"/>	EMG Contact: <input type="text"/>		
Last Name: <input type="text" value="Wilson"/>	EMG Phone #: <input type="text"/>		
Address			
RD 7 Box 006		Mother Employer: <input type="text"/>	
address 2 <input type="text"/>		Father Employer: <input type="text"/>	
Saxtons River	VT	05154	Pharmacy #: <input type="text"/>
Phone			
Home Phone: <input type="text" value="802-555-0183"/>	Recent Financial History		
Work Phone: <input type="text" value="802-555-0109"/>	Last Service: <input type="text" value="04/23/23"/>		
Cell Phone: <input type="text" value="802-555-0194"/>	Last Bill Sent: <input type="text" value="02/07/19"/>		
Emg Phone: <input type="text" value="802-555-0104"/>	Last Pers. Pmt: <input type="text" value="03/27/20"/>		
Email: <input type="text"/>	Last Ins. Pmt: <input type="text" value="04/09/20"/>		
	Hold Bill Until: <input type="text"/>		
	Budget Amt: <input type="text" value="\$"/>		
Home and Billing Account's Portal User		<input type="button" value="Unlink"/>	<input type="button" value="Manage"/>
Name: <input type="text" value="Mark Wilson (Guardian)"/>	Last Login: <input type="text" value="never"/>		
Sign In: <input type="text" value="802-555-0183"/>	Identity Verification: <input type="text" value="never"/>		
Portal Notifications: <input type="text" value="802-555-0183"/>	Temporary Password: <input type="text" value="LB.GfT"/>		
Balances: <input type="text" value="Mark Wilson (Account # 336)"/>	Unread Messages: <input type="text" value="0"/>		
	Unviewed Documents: <input type="text" value="0"/>		

Edit Policy		Payer ID: 54771
Insurance: <input type="text" value="Highmark PPO Blue \$15 ZAR"/>		
Copy: <input type="text" value="\$15.00"/>		
Certificate: <input type="text" value="ZAR199604527"/>		
Group: <input type="text" value="YOU539"/>		
Start Date: <input type="text" value="09/23/21"/>		
End Date: <input type="text"/>		
Subscriber:		
First Name: <input type="text" value="Robert"/>		
Last Name: <input type="text" value="Young"/>		
Date of Birth: <input type="text" value="04/25/92"/>		
Sex: <input type="text" value="Female"/>		
Address: <input type="text" value="address 1"/>		
<input type="text" value="address 2"/>		
city <input type="text"/>	state <input type="text"/>	zip code <input type="text"/>
Relationship: <input type="text" value="Son"/>		
Attachments		
	Title: <input type="text" value="none"/>	Pages: <input type="text" value="1"/>
	Category: <input type="text" value="Insurance/Billing"/>	
	Last Modified: <input type="text" value="daniel 09/11/23 3:45pm"/>	
<input type="button" value="Add Attachment"/>	<input type="button" value="Remove Attachment"/>	<input type="button" value="View Document"/>
<input type="button" value="Expire"/>	<input type="button" value="Delete"/>	<input type="button" value="Cancel"/>
<input type="button" value="Save"/>		

UC 2024

Pre-Check-In



[Back](#) My Kid's Chart

Pre-Check-In for Kellyn

Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

> Patient Information **Confirmed** ✓

> Billing Account **Confirmed** ✓

▼ Insurance **Not Confirmed** ⓘ

Insurance: **BCBS \$30 OV&WC-other**

Subscriber: Mark Wilson
Certificate: SBR186667814
Group: Wil427
Start Date: 12/22/20
Status: **Active**
Card Images: **Information requested**

[Edit](#)

[Add Insurance](#)

[Confirm](#)

Pre-Check-In **Not Ready to Submit**

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

▼ Pre-Check-In		
Patient Demographics	Current	Pre-Check Information
Name	Kellyn Wilson	Kellyn Wilson
Nickname		
Date of Birth	12/29/19	12/29/19
Sex	Female	Female
Race		<input checked="" type="checkbox"/> White
Ethnicity		<input checked="" type="checkbox"/> Prefers not to answer
Prof. Language		<input checked="" type="checkbox"/> English
Account Demographics	Current	Pre-Check Information
Name	Daniel Wilson	Daniel Wilson
Address	RD 7 Box 006 Saxtons River, VT 05154	RD 7 Box 006 Saxtons River, VT 05154
Home Phone	802-555-0183	802-555-0183
Work Phone	802-555-0109	802-555-0109
Cell Phone	802-555-0194	194
	802-555-0104	104
Insurance	Current	Pre-Check Information
Insurance	BCBS \$30 OV&WC-other	BCBS \$30 OV&WC-other
Status	Active	Active
Card Image		<input checked="" type="checkbox"/> View Image

[Import](#) Pre-Check information submitted by Daniel Wilson (Guardian) 09/13/23 10:26am

Information submitted during pre-check-in appears in orange

Checked items will be imported to the patient's record

Clicking import will accept all information with a checkmark and completes pre-check-in

Submitted card images can be viewed by clicking "View Image"

Improvements to Portal Payments

My Kid's Chart

✓ Thank you for submitting Pre-Check-In!

Personal Balance as of 04/30/24

Daniel Wilson	\$15.00
Kellyn Wilson (Dr. Williams, New NE)	
02/24/24	OV Comprehensive
Total Charge	\$160.00
Payments/Adjustments	-\$0.00
Pending Insurance	-\$145.00
Personal Balance	\$15.00

Total Personal Balance \$15.00
This is not a bill and may not reflect the entire account balance.

[Make a Payment](#)

[Pay at the Office](#)

Pre-Check-In prompts families to pay their balance.

Click "Make a Payment" to open the payment screen

Click "Pay at the Office" to return to the Patient Portal home screen

Home My Kid's Chart

PCC Pediatric Test Associates
(800) 722-1082

Payment Info

Amount
0.00

VISA Mastercard **DISCOVER** **AMEX**

Credit Card Number

CVV2
 ?

Expiration Date
Month Year

Save this card for future payments.

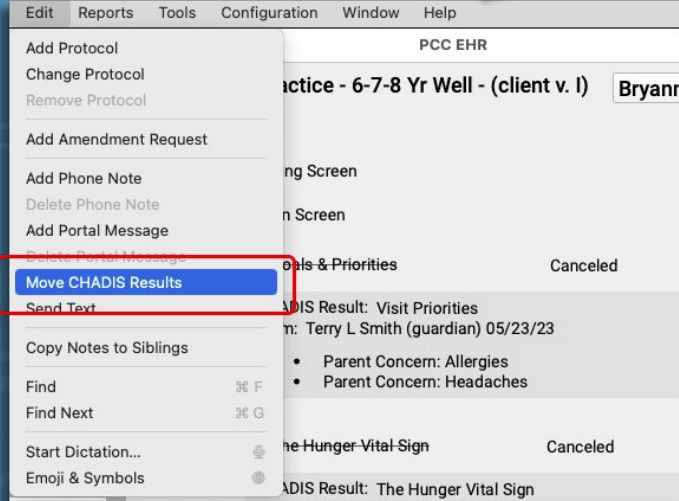
Contact PCC Support to remove these two icons

Amex and Discover are optional.

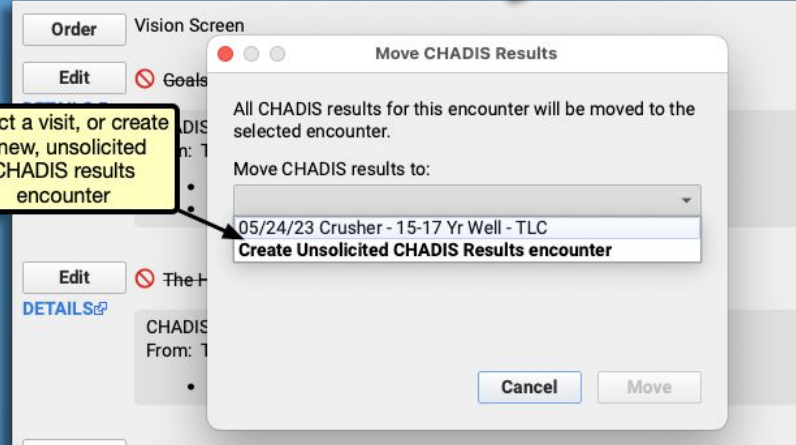
Move CHADIS Results

Select Move CHADIS Results from the Edit menu and pick a new encounter.

Encounters with CHADIS results can be deleted too.



Select a visit, or create a new, unsolicited CHADIS results encounter



Since Last UC.. We did a few things



25



19

Interface



Setups

11



27



UC
2024

What have you been up to this year?

CHADIS SCREENINGS

1,438,041 questionnaires completed

**602,776 encounters with completed
CHADIS questionnaires**

Data from 7/1/23-7/1/24

What have you been up to this year?

Broadcast, Texts, and Emails

Total Broadcasts: 83,929

Broadcast SMS Sent: 17,472,528

Broadcast Emails Sent: 6,088,405

Total SMS Single Sent: 3,810,521

Data from 7/1/23-7/1/24

What have you been up to this year?

Portal Payments

Portal Payment Transactions: 541,021

Portal Payments: \$41,369,352.34

Data from 7/1/23-7/1/24

What have you been up to this year?

Patient Notification (notify)

Voice: 682,963

SMS: 2,089,029

Email: 86,380

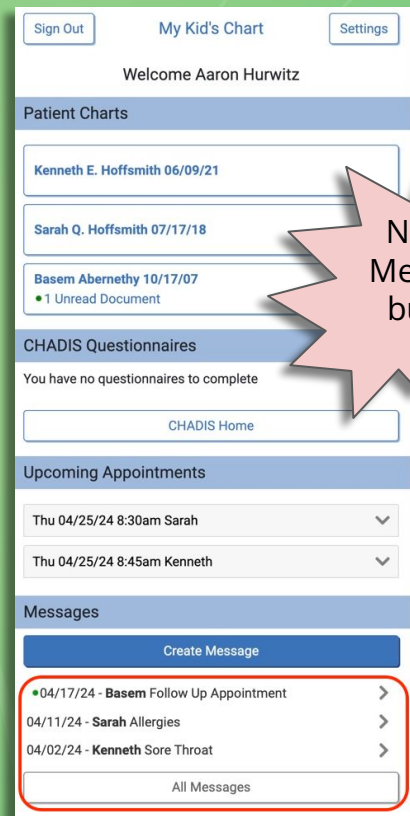
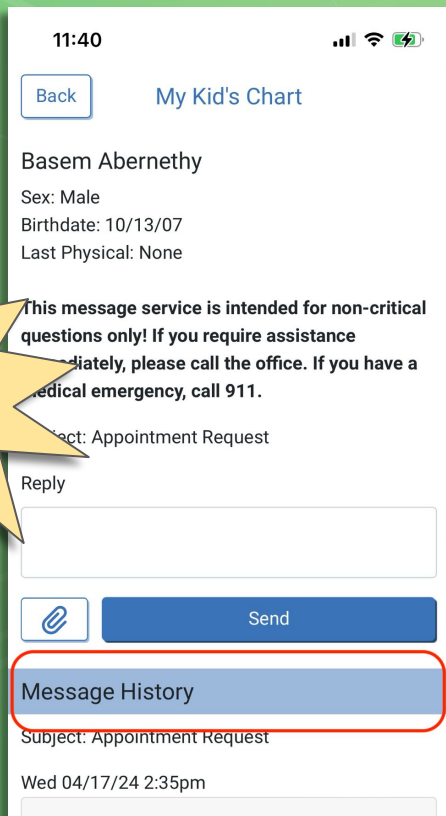
Data from 7/1/23-7/1/24

What's Next: More Portal Improvements

Work In Progress

New All Messages button.

Message History will be on the reply page.



What's Next:

Combine Duplicate Patients and Accounts

Combine Patients - Review Data to Combine

Warren Jr Lane Account #458 2952 Green Hill Road

Appointments, documents, immunizations and chart-wide component data for both patients will be combined.

✓ KEEP	+ APPEND	= COMBINED
<p>Carolina Lane (PCC# 1637)</p> <p>Patient Flags: Adoption</p> <p>Clinical Data</p> <p>Appointments: 15 Encounters: 13 Documents: 62 Immunizations: 16</p>	<p>Carolina E. Lane (PCC# 5091)</p> <p>Patient Flags: Chronic</p> <p>Clinical Data</p> <p>Appointments: 1 Encounters: 1 Documents: 4 Immunizations: 16</p>	<p>Carolina Lane (PCC# 1637)</p> <p>Patient Flags: Adoption, Chronic</p> <p>Clinical Data</p> <p>Appointments: 16 Encounters: 14 Documents: 66 Immunizations: 32</p>

On the Roadmap and in Design

- Update Growth Charts to display z-scores
- Improve workflow of signing policy documents electronically through the Patient Portal
- Allow other portal users to complete Patient Pre-Check-In

To Be Continued...

Related 2024 UC Offerings

Engaging with Your Patients

Thursday 10:05 AM

Room: Mt Oxford

Patient Pre-Check-In

Thursday 1:15 PM

Room: Mt Columbia

Unleash the Power of CHADIS Integration

Thursday 11:10 AM

Room: Mt Oxford

Panel on Incorporating Behavioral Health

Thursday 3:45 PM

Room: Colorado A

Forms and Reporting

Dan Gillette, Tori Wonderlick, Tim Proctor

New Report Functionality

Report Library

Immunization Administration Details

View vaccine administration details for a given date range, including funding source, VFC eligibility, insurance policies and administering user.

Report Categories Clinical, Immunization, Patient, Visit

Administration Date From 06/03/2024 to 06/03/2024

Immunization Status Administered, Canceled, Contraindicated, Refused

Immunization Source New Immunization Record, Historical

Administrating User All Administrating Users

Immunization Location All Appointed Locations

Back Schedule Customize Report Close Generate

Faster generation of report results!

Report on all statuses and sources of immunizations!

UC
2024

More Letterhead Options

Create practice-wide footers!

The screenshot shows the 'Forms Configuration' window with the 'Letterhead*' tab selected. The main area is titled 'Letterhead Configuration' and contains a rich text editor with a toolbar (bold, italic, underline, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, undo, redo). The editor displays a preview of a letterhead with the 'PCC' logo, an 'Edit Header' button, and several text fields for 'Practice Name', 'Practice Address - Line 1', 'Practice Address - Line 2', 'Practice Address - City', 'Practice Address - State', and 'Practice Address - Zip'. Below the editor is a large text area with the placeholder 'This is where the body of your form will be.' At the bottom, there is a 'Save' button and a preview of a footer with contact information for 'PCC PEDIATRIC TEST ASSOCIATES'. On the right side, a 'Variables' panel is open, showing a search bar and a list of variables with their descriptions.

Variable Name	Description
Allergies	
Billing Account "A Last Name"	
Billing Account "Cell Phone"	
Billing Account "EMG Contact"	
Billing Account "EMG Phone #"	"EMG Phone #" for the patient's Billing Account.
Billing Account "Emg Phone"	"Emg Phone" number for the patient's Billing Account.
Billing Account "Father Employer"	"Father Employer" for the patient's Billing Account.
Billing Account "Home Phone"	"Home Phone" number for the patient's Billing Account.

You control margins for headers and footers

Form Improvements

Change form margins, too!

Forms Configuration - Edit Form

Form Name: Active Inactive

B I U A [Color Picker] [Font Size] [List] [Text] [Align] [Indent] [Outdent] [Table] [Table Border]

Body Margin (1")

ECZEMA ACTION PLAN

Patient Full Name **Patient Birth Date** **Patient Age**

DIAGNOSIS: **Response**
Response

Allergies
Triggers Response
Medication Allergies

REGULAR DAILY CARE: (Do this every day even if skin is good to keep it that way.)

***Bathe** with lukewarm water, 5 - 10 minutes. Avoid scrubbing and rubbing the skin as this can cause flare-ups. NO LONG HOT SHOWERS.
*Use **mild soap**, if any, such as *Dove for sensitive skin*, *Cetaphil cleanser*, or *Aveeno for dry skin*. If not too dirty, use soap only on hands, feet, armpits, and genital area, not all over.
*Apply **moisturizer at least 2 times a day**, even if no bath is taken, and after every bath. After bath, pat dry and apply the moisturizer **RIGHT AWAY**, within 3 minutes, all

Last Saved: 07/13/2023 4:34pm

Variables

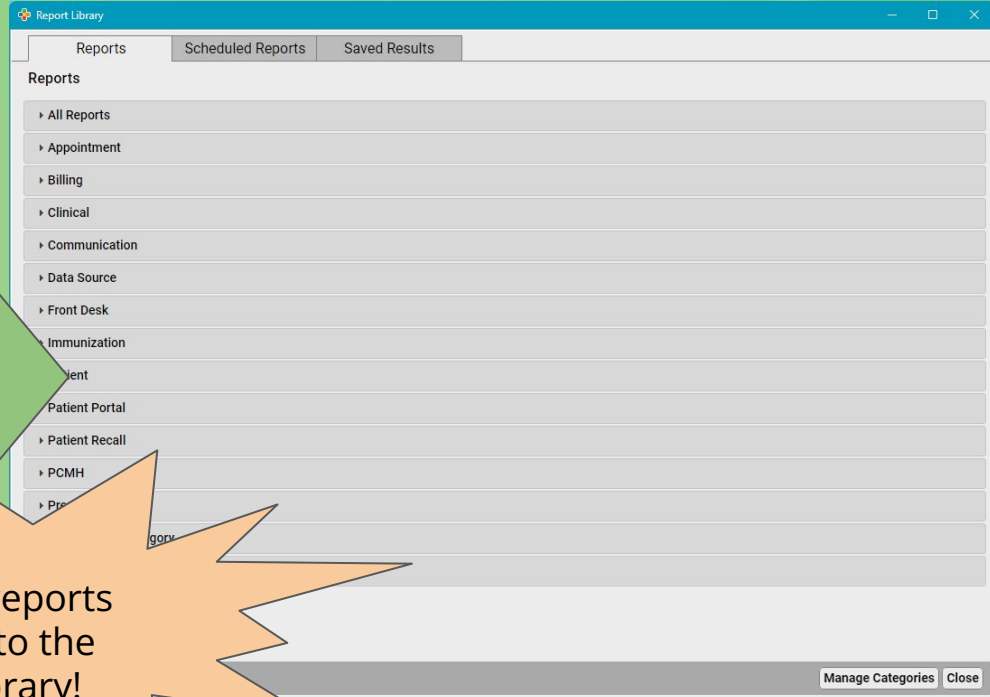
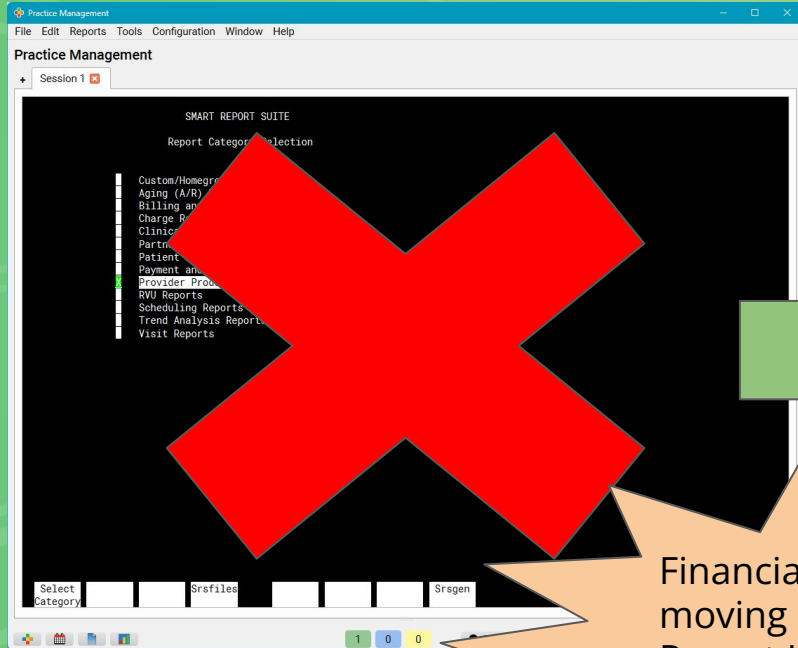
Search Filter

Variable Name	Description
Allergies	List of the patient's active allergies. Does not include medication allergies.
Billing Account ""	"" for the patient's Billing Account.
Billing Account "Alt Name"	"Alt Name" for the patient's Billing Account.
Billing Account "Emergency"	"Emergency" number for the patient's Billing Account.
Billing Account "Emg Contact"	"Emg Contact" for the patient's Billing Account.
Billing Account "Legal Guardian"	"Legal Guardian" for the patient's Billing Account.
Billing Account "Primary Name"	"Primary Name" for the patient's Billing Account.
Billing Account "Primary" number for the	"Primary" number for the

Now with Improved technology for form generation!

UC
2024

New Reports!



Financial reports moving into the Report Library!

UC 2024

Easier Productivity Reports!

Report Library

Customize Report - Preview

Total Charges and Payments by Provider, Month, and Procedure Group

Aggregate charges and payments by provider for provider productivity assessments.

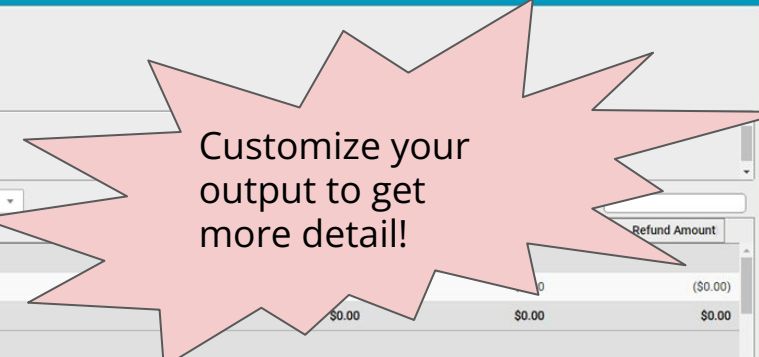
Transaction Date: From 06/01/2024 to 06/30/2024
Include by Procedure: All
Exclude by Procedure: None
Provider: All

Columns: All 6 Displayed Group By: Provider

Provider	Transaction Month	Procedure Group	Charges	Payments	Refund Amount
Alfred Woodward, M.D. (1)					
Alfred Woodward, M.D.	2024-06	Office Visits			(\$0.00)
			\$0.00	\$0.00	\$0.00
Beverly Crusher, MD (1)					
Beverly Crusher, MD	2024-06	Office Visits	\$90.00	\$40.00	(\$0.00)
			\$90.00	\$40.00	\$0.00
Elizabeth Mary Casey, MD (19)					
Elizabeth Mary Casey, MD	2024-06	Supplies	\$41.00	\$46.05	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	Medications	\$0.00	\$0.00	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	Office Visits	\$5,092.90	\$4,117.70	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	Medical Procedures	\$706.00	\$242.04	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	E/M - Newborn Care	\$390.00	\$0.00	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	Well Child Care	\$1,296.00	\$946.81	(\$0.00)
Elizabeth Mary Casey, MD	2024-06	E/M - Hospital Care	\$0.00	\$112.58	(\$0.00)
			\$80,483.76	\$52,353.11	\$0.00


83 results

Back Cancel Save Save As



UC
2024

Related 2024 UC Offerings

- New Forms to the Rescue: Featuring  and His Minions (Wed 4:10-5:10pm)
- Build Your Own Forms (Thu 3-4pm)
- Financial Oversight Reporting (Thu 10am-12pm)
- Clinical Oversight Reporting (Fri 9:50am-12pm)
- Reporting Drop-In Session (Fri 1:15-2:15pm)

Technical Services

Mark

UC
2024

What's New

Rocky8 OS server migrations:

- Long Term Support
- Enhanced Security
- Optimized Performance

42 Physical server upgrades

121 GCE server upgrades

What's New

Leveraging the cloud server
model
(GCE)

Evaluating when you are due for a server upgrade:

Speed


Latency

Practice size

Keeping The Lights On



Your soup  to nuts  technical services team - from onboarding through ongoing maintenance.

It's all part of the deal!  Server, switches, router/Firewall, back-ups, wireless access points, NAS (network attached storage), email: all part of your subscription.

Ongoing firmware and hardware refreshment.



Advising on network architecture, IT vendor, VoIP phones, hardware, security assessment.



What's Next

Why GCE (Google Compute Engine)? Availability, recoverability and resilience for your growing practice.

Storage considerations:

- Object cloud storage for large volumes of data.
- Block cloud storage for transactional data, small files needing frequent retrieval.

Related 2024 UC Offerings

- Mastering Spreadsheets 101 with Stephen Moore (Thu 3:45-4:30pm)
- HIPAA: Securing Your Patients and Practice with Megan Maddocks (Wed 3:00-4:00pm)

CAs/RRT

Jerry, Kate

What's New

Exciting News

We are thrilled to announce the launch of our new support ticketing system, **Freshdesk**! This modern and user-friendly platform will streamline our support processes, ensuring that your queries and issues are resolved more efficiently and effectively.

With Freshdesk, you can:

- Easily submit and track your support tickets.
- Receive timely updates and notifications on the status of your requests.
- Access a comprehensive knowledge base for quick self-help solutions.
- Enjoy a seamless and responsive support experience.

We are committed to enhancing our customer support, and Freshdesk is a significant step towards achieving that goal. Thank you for your continued trust in PCC.

Who is New?



Fisher Wagg

Rapid Response
February 2024



Jeremy Hill

Rapid Response
November 2023



**Andriana
Chobot**

Client Advocate
March 2024

Related 2024 UC Offerings

Help Us Help You - 2:30 Thursday 7/18 in Mt Oxford with Jerry Wolfenbarger



That's All Folks

UC
2024