

# Are You Sharing Data Like It's 2025?

Jennifer Marsala, Scott Kirby, and Fisher Wagg

# Q&A



Scan the QR code, or



Go to [slido.com](https://www.slido.com) and enter the code 2098185



Select “Are You Sharing Data Like It’s 2025?”



Submit questions



We’ll answer at the end



# Course Objectives



Identify the various options for sharing clinical data



Understand the use cases for each data sharing option



Know how to get your practice started with the various methods of exchange

# Course Overview

*Single-patient, EHR-based offerings*



**Direct Secure Messaging**



**Chart Export**



**Clinical Document Exchange**



**Bidirectional Immunizations**



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*Population-level, backend offerings*



**State Departments of Health**



**HIE**



**CIN, ACO, Provider Networks**





# Direct Secure Messaging

*What is it?*

Direct Secure Messaging (DSM) is really secure email meant for the exchange of health information.



# Direct Secure Messaging

*Why would I use this solution?*



Referrals



Transitions of care

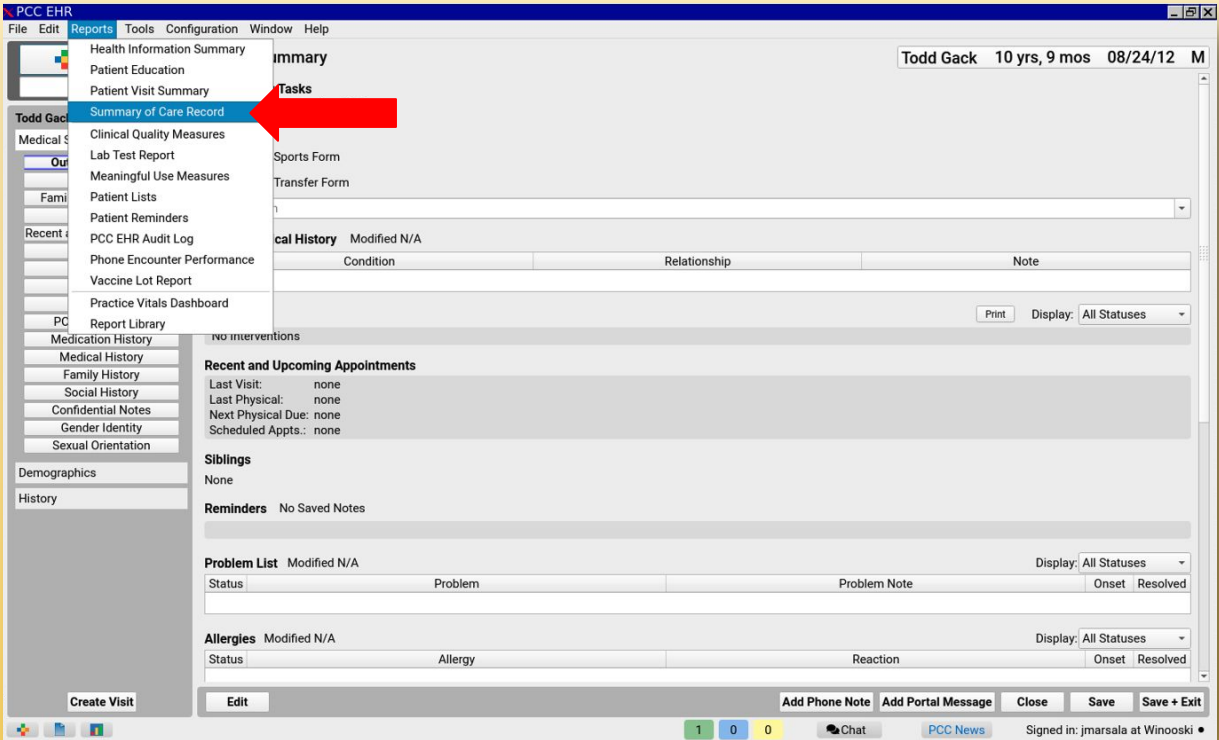


Coordination of care

# Direct Secure Messaging

*How does it work?*

## Sending a Direct Secure Message in PCC EHR



# Direct Secure Messaging

*How does it work?*

## Sending a Direct Secure Message in PCC EHR

Summary of Care Record

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document Id	6073507f-a309-4493-b845-366e3381bf14
Document Created:	June 19, 2023, 17:04:39 -0400
Performer (primary care provider)	
Author	PCC EHR
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708

Select a referral or outbound transition of care:

06/19/23 Referral: Dermatology

Related to an outbound transition of care

06/19/23 Referral: Dermatology

Not related to a transition of care

☐ Save as a PDF file

☐ Save as a C-CDA file

☒ Send via Direct Secure Messaging:

Cancel

Send to...

Select referral or transition of care

Option to limit the information included

Select Direct Secure Messaging



# Direct Secure Messaging

*How does it work?*

## Sending a Direct Secure Message in PCC EHR

Recipient's Direct address

Subject line

Message

**Direct Secure Message**

To:

From: PCC PCC (pcc@scone.qa.pcc-direct.com)

Subject:

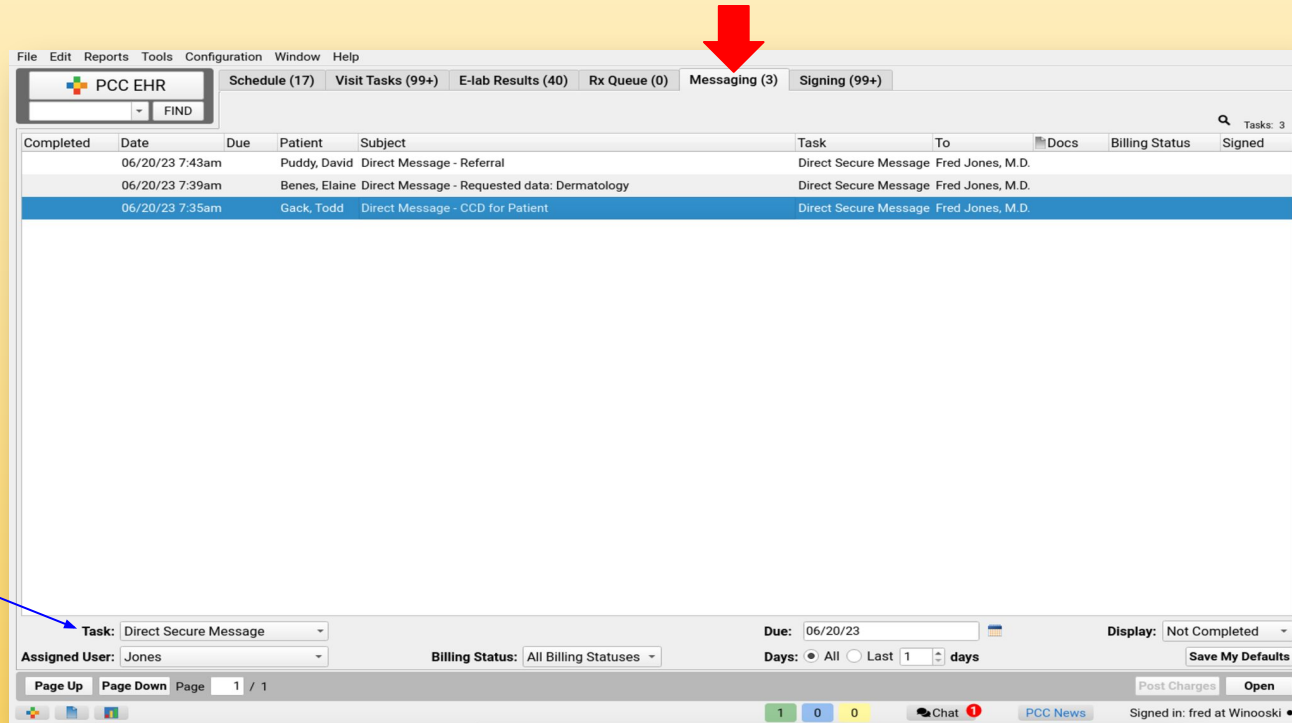
Message:

Attachments (maximum 50MB):  
Continuity of Care Document (13 KB)

# Direct Secure Messaging

*How does it work?*

## Receiving a Direct Secure Message in PCC EHR



The screenshot shows the PCC EHR interface with the Messaging tab selected. A red arrow points to the Messaging tab. The table below lists the tasks:

Completed	Date	Due	Patient	Subject	Task	To	Docs	Billing Status	Signed
	06/20/23 7:43am		Puddy, David	Direct Message - Referral	Direct Secure Message	Fred Jones, M.D.			
	06/20/23 7:39am		Benes, Elaine	Direct Message - Requested data: Dermatology	Direct Secure Message	Fred Jones, M.D.			
	06/20/23 7:35am		Gack, Todd	Direct Message - CCD for Patient	Direct Secure Message	Fred Jones, M.D.			

At the bottom of the interface, there is a task filter dropdown menu. A blue box with an arrow points to this dropdown, containing the text: "Use the task filter to easily find messages."

Task: Direct Secure Message

Assigned User: Jones

Billing Status: All Billing Statuses

Due: 06/20/23

Days: All Last 1 days

Display: Not Completed

Page Up Page Down Page 1 / 1

Post Charges Open

Signed in: fred at Winooski

# Direct Secure Messaging

How does it work?

## Receiving a Direct Secure Message in PCC EHR

Add the message to the patient's chart

View attached C-CDAs and PDFs

Completed

Date

06/20/23 7:43

06/20/23 7:39

06/20/23 7:35

Task: Direct Secure

Assigned User: Jones

Page Up

Page Down

Page

Message

Continuity of Care Document

rxactivity.pdf

Patient Information from the Continuity of Care Document

Patient Name: Todd Gack

DOB: 08/30/12

Sex: Male

Message

Date: 06/20/23

From: mark@bopeep7.qa.pcc-direct.com

To: fred@bopeep7.qa.pcc-direct.com

Subject: CCD for Patient

Message: Attached please find the patient's CCD.

View

Save As

Continuity of Care Document: Continuity of Care Document

View

Save As

File: rxactivity.pdf

Select the patient to receive the Direct Secure Message.

Find

Best Matches for: Todd Gack 08/30/12 M

Last	First	DOB/Sex	Age	PCC
Gack	Todd	08/30/12	M 10y 9m	348
Caba	Todd	07/11/20	M 2y 11m	197
Dearment	Todd	04/21/99	M 24y 1m	291
Pintarch	Todd	11/24/03	M 19y 6m	184
Vastyen P.A.	Todd "Paige" David	12/07/22	M 6m 1w	384
Warner	Todd	06/04/14	M 9y	302

# Direct Secure Messaging

*How does it work?*

## Receiving a Direct Secure Message in PCC EHR

File Edit Reports Tools Configuration Window Help

FIND

Todd Gack PCC# 3484

Medical Summary

Demographics

History

PCC eRx

Message: 06/20/23

Direct Secure Message

**Direct Secure Message**

Tasks

Summary: CCD for Patient

**Message**

Date: 06/20/23

From: mark@bopeep7.qa.pcc-direct.com

To: fred@bopeep7.qa.pcc-direct.com

Subject: CCD for Patient

Message: Attached please find the patient's CCD.

View Reconcile Save As

Continuity of Care Document: Continuity of Care Document

View Save As

File: rxactivity.pdf

▼ Tasks

Task  To

Due 06/20/23

Note

☐ Task Completed At   By

Add Task

Previous Next

Close Save Save + Exit

1 0 0

Chat 1

PCC News

Signed in: fred at Winooski •

Configure the DSM Protocol to include additional components.





# Direct Secure Messaging

How does it work?

## Reconciling a C-CDA in PCC EHR

Reconcilable C-CDA Sections

- Problems
- Medication Allergies
- Medications

Compare the C-CDA against the patient's chart and select items to import.

Reconciliation - ImportTodd Gack 10 yrs, 9 mos 08/30/12 M

Select the problems, medications, and medication allergies from the Continuity of Care Document to import into the patient's chart.

Problems

Continuity of Care Document Problems

Add to EHR	Status	Problem	Onset	Resolved	Last Modified
<input checked="" type="checkbox"/>	Active	Overweight			
<input checked="" type="checkbox"/>	Active	Asthma			
<input type="checkbox"/>	Inactive	Wheezing			

PCC EHR Problem List

Status	Problem	Problem Note	Onset	Resolved	Last Modified
Active	Heart murmur				06/20/23

Medication Allergies

Continuity of Care Document Medication Allergies

Add to EHR	Status	Drug	Reaction	Onset	Last Modified
<input type="checkbox"/>	Inactive	Anaphylaxis caused by insect bite and/or insect sting			
<input checked="" type="checkbox"/>	Active	Allergy to latex		07/08/10	

PCC EHR eRx Allergies

Drug	Reaction	Onset	Last Modified
------	----------	-------	---------------

Medications

Continuity of Care Document Medications

Add to EHR	Status	Drug	Details	Last Modified
<input checked="" type="checkbox"/>	Active	Timolol 0.5 % Ophthalmic Gel Forming Solution	;	06/20/23
<input type="checkbox"/>	Inactive	Amoxicillin 875 mg PO Tablet	;	02/10/23

PCC EHR Medication History

Status	Drug	Formula	Details	Last Modified
Active	EPINEPHRINE 0.3 MG/0.3 ML (1:1,000) (ADULT) PEN INJECTOR		0.3 mg IM every 5 to 15 minutes PRN hypersensitivity reaction; do not exceed ...	

Warning: Imported Medication Allergies and imported Medications must be reviewed in PCC eRx to ensure that drug to allergy and drug to drug interactions are correctly represented.

CancelNext

UC2025  
BUILDING SOMETHING AWESOME

PCC  
Pediatric EHR Solutions

# Direct Secure Messaging

*How do I get started?*



Check with the healthcare organizations you exchange with to confirm that they have Direct addresses



Contact your Client Advocate and express your interest



An implementation specialist will provide training and onboard your practice.

# Clinical Document Exchange

*What is it?*

A framework that provides a way for an organization to



Query another organization for a particular patient



Learn what clinical documents are available for the patient

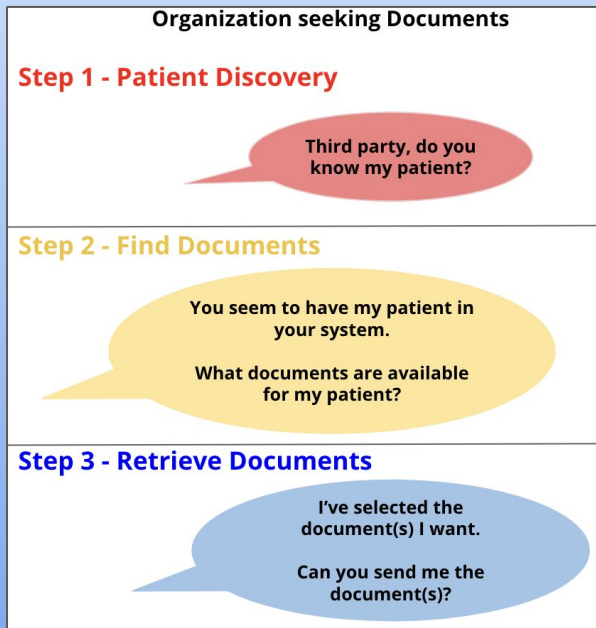


Retrieve the documents

# Clinical Document Exchange

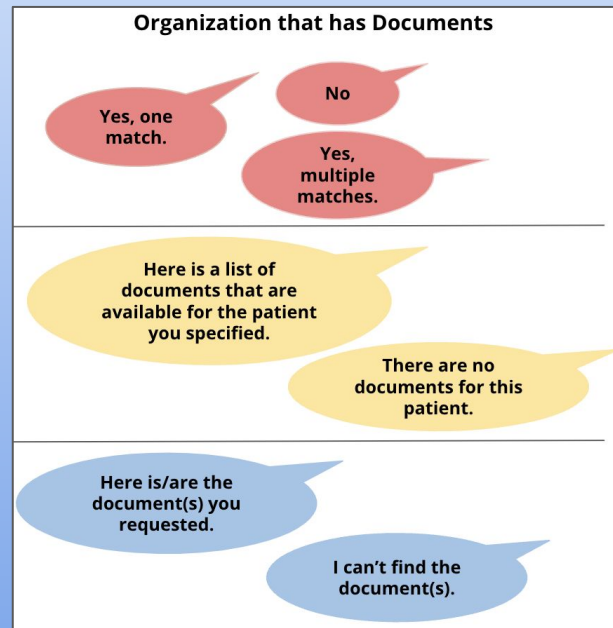
*What is it?*

## Initiator



You can retrieve documents from other organizations.

## Responder





Other organizations can retrieve documents from you.


# Clinical Document Exchange

*What is it?*



 PCC is a *Carequality Implementer*.

 If your practice decides to participate in Clinical Document Exchange, it becomes a *Carequality Connection*.

 Documents are shared directly and securely between organizations.

# Clinical Document Exchange

*Why would I use this solution?*



Check for and retrieve records from an organization that treated your patient (e.g., Discharge summary from the hospital)



Make your patients' Summary of Care document available for retrieval by authorized healthcare organizations

# Clinical Document Exchange

How does it work?

## Initiator Role

Any participating organizations will appear in

Default will be queried as set at the practice

### Clinical Document Exchange Configuration

Select default organizations to be queried for clinical documents.

Organization	Address
PCC Pediatric Test Associates (cake)	
Paradise Valley Community Hospital 4116 Rocket Drive, Golden Valley, MN 55427	
Maple Valley General Hospital 2611 Wexford Way, Clinton, SC 28328	
Goldvalley General Hospital 4322 Redbud Drive, Whitestone, NY 11357	
Tennessee Valley Pain Management 6130 Shallowford Rd, CHATTANOOGA, TN 37421-7215	
ARIZONA WOMEN'S HEALTH, PLLC 270 E HUNT HWY SUITE 10, SAN TAN VALLEY, AZ 85143-4963	
Grand Valley Neurology, Prof. LLC 744 HORIZON COURT, GRAND JUNCTION, CO 81506-3936	
Nashoba Valley Healthcare Group	

# Clinical Document Exchange

*How does it work?*

## Initiator Role

Navigate to History and then the *Find Clinical Documents* component.

The screenshot displays the PCC EHR interface. On the left, a sidebar shows the patient's history, with 'Find Clinical Documents' highlighted. The main area is titled 'Find Clinical Documents' and shows a table of healthcare organizations to query. A blue arrow points from the 'Find Clinical Documents' link in the sidebar to the 'Find Patient' button. Another blue arrow points from the 'add another healthcare organization' text box to the 'Find Patient' button.

**PCC EHR**

Find Clinical Documents

David Puddy 5 yrs, 5 mos 11/27/19 M

**▼ Healthcare Organizations to Query**

Search the following healthcare organizations for clinical documents.

Query	Organization	Address	Last Queried
<input checked="" type="checkbox"/>	PCC Pediatric Test Associates (muffin)	20 Winooski Falls Way, Winooski, VT 05404-2228	never

**Find Patient**

**David Puddy PCC# 3483**

Medical Summary

Demographics

History

- Visit History
- Immunization History
- Flowsheets
- Growth Charts
- Find Clinical Documents**
- Documents
- Billing History

**Create Visit**

**Close Save Save + Exit**

Signed in: jmarsala at Winooski

Search for and query organizations on-the-fly.



# Clinical Document Exchange

*How does it work?*

## Initiator Role

PCC EHR

Find Clinical Documents

David Puddy 5 yrs, 5 mos 11/27/19 M

Healthcare Organizations to Query

PCC Pediatric Test Associates (muffin) Last updated: 05/21/25 1:23pm Refresh

Name	Date of Birth	Sex	Address
<input checked="" type="checkbox"/> David Puddy	11/27/2019	M	1872 3rd Avenue, New York, NY 10029

Find Documents

David Puddy PCC# 3483

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

**Find Clinical Documents**

Documents

Billing History

Create Visit

Close Save Save + Exit

1 0 0 Chat PCC News Signed in: jmarsala at Winooski

Confirm the patient match then proceed to Find Documents.

## How does it work?

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Find Clinical Documents

Documents

Billing History

Create Visit

David Puddy

PCC# 3483

Find Clinical Documents

Healthcare Organizations to Query

PCC Pediatric Test Associates (muffin)

Dates:

All

From

mm/dd/yy

to

mm/dd/yy

☐ Include previously retrieved documents
 ☐ Include deprecated documents
 ☒ Include unsupported file types

David Puddy

Last updated: 05/21/25 1:28pm

Refresh

	Document Date	Document Name	File Type	Status	Last Retrieved
Retrieve	05/15/2025	Summary of Episode Note	CCDA	Approved	never
Retrieve	04/02/2024	Media.schema	application/octet-stream (Unsupported)	Approved	never
Retrieve	04/02/2024	toby	TIFF	Approved	never
Retrieve All	Back To Patient Match				

Close

Save

Save + Exit

100

Chat

PCC News

Signed in: jmarsala at Winooski

Document date, name, file type, status, and last retrieved date display for each available document.

Import desired documents.

# Clinical Document Exchange

*How does it work?*

## Initiator Role

PCC EHR

David Puddy PCC# 3483

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

**Find Clinical Documents**

Documents

Billing History

Create Visit

Find Clinical Documents

David Puddy 5 yrs, 5 mos 11/27/19 M

Healthcare Organizations to Query

PCC Pediatric Test Associates (muffin)

Dates: ☒ All ☐ From  to

☐ Include previously retrieved documents

☐ Include deprecated documents

☒ Include unsupported file types

David Puddy Last updated: 05/21/25 1:28pm Refresh

	Document Date	Document Name	File Type	Status	Last Retrieved
<b>View</b>	05/15/2025	Summary of Episode Note	CCDA	Approved	05/21/25
<b>Reconcile</b>	04/02/2024	Media.schema	application/octet-stream (Unsupported)	Approved	never
<b>View</b>	04/02/2024	toby	TIFF	Approved	05/21/25

Retrieve All Back To Patient Match

Close Save Save + Exit

1 0 0 Chat PCC News Signed in: jmarsala at Winooski

To open the document, click View.

To immediately reconcile a C-CDA document, click Reconcile.

Each Carequality Implementer determines what types of documents will be made available for retrieval from their Connections.

# Clinical Document Exchange

*How does it work?*

One **Summary of Care (CCD)** document per patient is available for retrieval (when patient consent is set to Yes).

When changes occur to a patient's record, an updated copy is made available for retrieval.

*PCC EHR does this automatically!*

## Responder Role

Summary of Care Record Todd Gack (10 yrs, 9 mos; 08/24/12; M)

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document Id	6263f09d-0a01-4934-bcb2-bffaf1feea2
Document Created:	June 19, 2023, 08:50:46 -0400
Performer (primary care provider)	
Author	PCC EHR
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708
Document maintained by	PCC Pediatric
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708

Table of Contents

- [Allergies, adverse reactions, alerts](#)
- [History of medication use](#)
- [Problem List](#)
- [History of procedures](#)
- [Relevant diagnostic tests and/or laboratory data](#)
- [Vital Signs](#)
- [Social history](#)
- [Care Plan](#)
- [History of immunizations](#)
- [Encounters](#)
- [Reason for Referral](#)
- [Functional status assessment](#)
- [Payers](#)

Table of Contents

- [Allergies, adverse reactions, alerts](#)
- [History of medication use](#)
- [Problem List](#)
- [History of procedures](#)
- [Relevant diagnostic tests and/or laboratory data](#)
- [Vital Signs](#)
- [Social history](#)
- [Care Plan](#)
- [History of immunizations](#)
- [Encounters](#)
- [Reason for Referral](#)
- [Functional status assessment](#)
- [Payers](#)

# Clinical Document Exchange

*How do I get started?*

<https://carequality.org/active-sites-search/>

Find out if your  
exchange partners  
are active with  
Carequality.

SEARCH RESULTS

UVM Medical Center Adult Primary Care - Burlington  
Burlington, VT

UVM Medical Center Adult Primary Care - Essex  
Essex, VT

UVM Medical Center Adult Primary Care - South Burl...  
South Burlington, VT

UVM Medical Center Adult Primary Care - Williston  
Williston, VT

UVM Medical Center Audiology - Fanny Allen Campus  
Colchester, VT

UVM Medical Center Bariatric Surgery - Williston  
Williston, VT

UVM Medical Center Breast Imaging - UHC S Prospect  
Burlington, VT

UVM Medical Center Cardiac Rehabilitation - Tilley  
South Burlington, VT

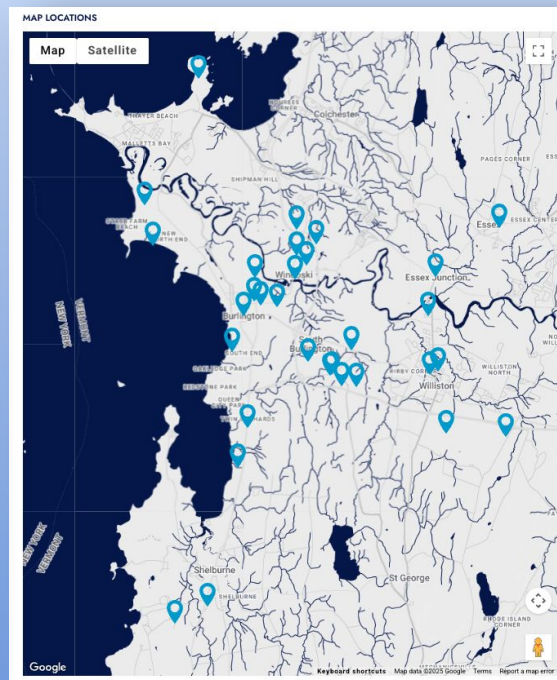
UVM Medical Center Cardiology - Tilley  
South Burlington, VT

UVM Medical Center Cardiothoracic Surgery - Platts...  
Plattsburgh, NY

FIRST < PREV 9 10 11 12 NEXT > LAST  
PAGE 12 OF 19


DOWNLOAD TEXT


DOWNLOAD SPREADSHEET



# Clinical Document Exchange

*How do I get started?*

 Use the search tool at [carequality.org](https://carequality.org) to see the active sites near you

 Contact your Client Advocate and express your interest

 An implementation specialist will provide training and onboard your practice

# Chart Export

*What is it?*

A tool within PCC EHR that allows you to export a whole patient chart into a password-protected encrypted file



# Chart Export

*Why would I use this solution?*



Honor patient requests for data



Transitions of care



Legal reasons

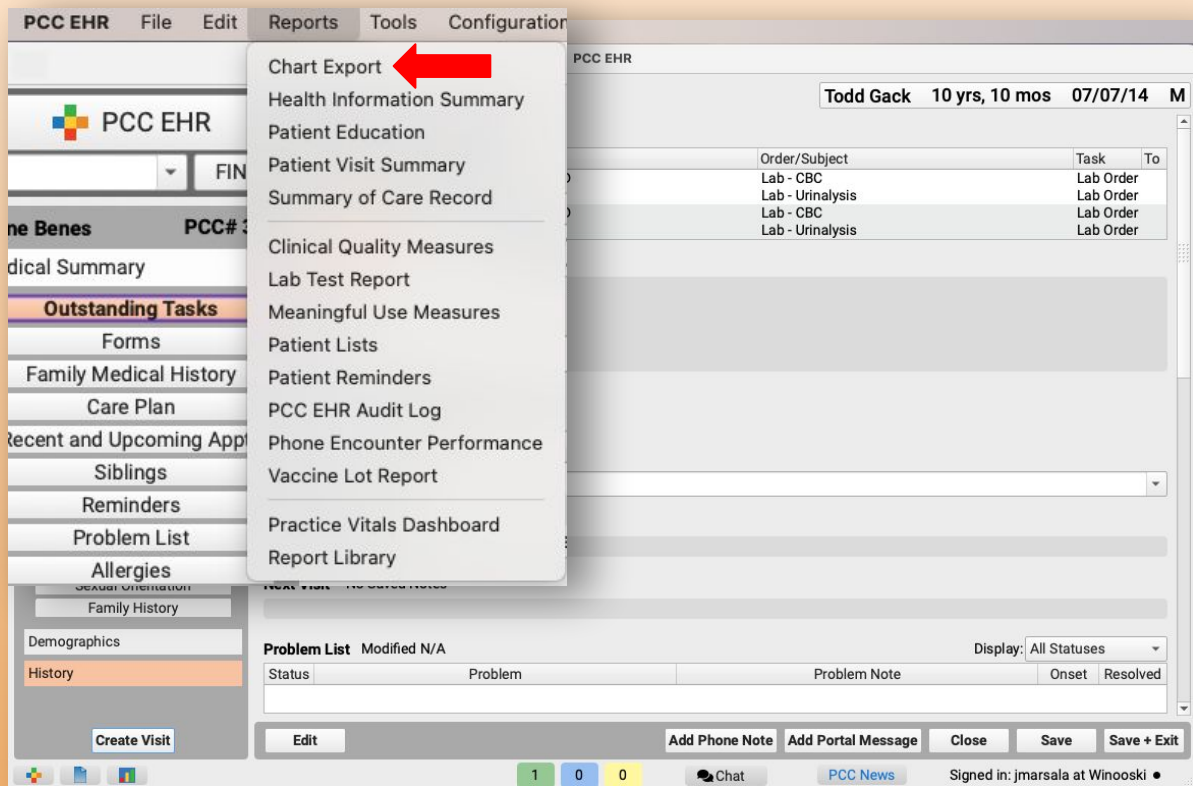


Insurance chart audits



# Chart Export

*How does it work?*



# Chart Export

*How does it work?*

Decide whether to include certain information in the chart export.

The screenshot shows a 'Chart Export' window. At the top, it displays patient information: 'Todd Gack', '10 yrs, 10 mos', '06/17/14', and 'M'. Below this, a message states: 'Export all charted information and documents for this patient to an encrypted file. This process may take a few minutes to complete.' A second message asks for an encryption password, noting it won't be displayed again. The password 'FTz9CML4d7cW10A' is shown next to a 'Copy' button, which is highlighted by a red arrow. Below the password section are four checkboxes for selecting content to export: 'Include Confidential Content' (with sub-items 'Confidential Components' and 'Confidential Notes'), 'Include Sexual Orientation and Gender Identity' (with 'Privacy Status: Private'), 'Include Portal Messages' (with 'May contain sensitive information' and a list of portal users including 'Jen Marsala'), and 'Include Phone Notes' (with 'May contain sensitive information'). At the bottom right, there are 'Cancel' and 'Export' buttons, with the 'Export' button highlighted by a red arrow. A blue box on the left with the text 'Decide whether to include certain information in the chart export.' has four arrows pointing to the four checkboxes.

Chart Export

Todd Gack 10 yrs, 10 mos 06/17/14 M

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: FTz9CML4d7cW10A **Copy**

☐ Include Confidential Content

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

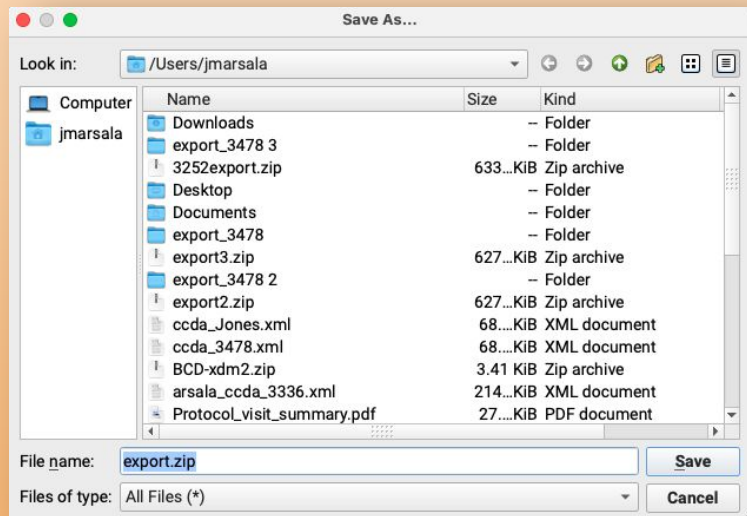
☐ Include Phone Notes (**May contain sensitive information**)

Cancel Export

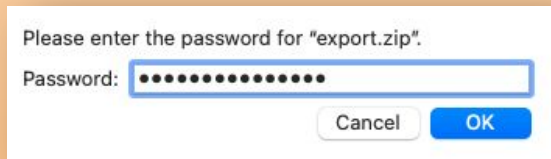
# Chart Export

*How does it work?*

Save the export to the workstation and then share the file with the recipient.



The recipient uses the encryption password to access the export.































# Chart Export

*How does it work?*

The export contains all data from the patient's chart.

File formats include CSV, HTML, PDF, and XML.

The encounters folder contains html files of the patient's Visit Summaries.

Name	Date Modified	Size	Kind
 billing_diagnoses.csv	Today at 10:55 AM	695 bytes	CSV Document
 ccda_3478.xml	Today at 10:55 AM	69 KB	XML document
 chart.html	Today at 10:55 AM	14 KB	HTML text
 chart.pdf	Today at 10:55 AM	41 KB	PDF Document
 demographics.csv	Today at 10:55 AM	1 KB	CSV Document
 diagnoses.csv	Today at 10:55 AM	222 bytes	CSV Document
 documents.csv	Today at 10:55 AM	108 bytes	CSV Document
▼  encounters	Today at 10:55 AM	--	Folder
 ehrreportstyle.css	Today at 10:55 AM	594 bytes	Text Document
 PHONE_03-25-2024_9816.html	Today at 10:55 AM	5 KB	HTML text
 VISIT_03-20-2024_9744.html	Today at 10:55 AM	31 KB	HTML text
 VISIT_03-21-2024_9739.html	Today at 10:55 AM	5 KB	HTML text
 VISIT_04-10-2024_9745.html	Today at 10:55 AM	3 KB	HTML text
 webfonts.css	Today at 10:55 AM	757 KB	Text Document
 encounters.csv	Today at 10:55 AM	493 bytes	CSV Document
 familyhistory.csv	Today at 10:55 AM	226 bytes	CSV Document
 immunizations.csv	Today at 10:55 AM	2 KB	CSV Document
 immunizations.pdf	Today at 10:55 AM	16 KB	PDF Document
 medallergies.csv	Today at 10:55 AM	182 bytes	CSV Document
 medications.csv	Today at 10:55 AM	360 bytes	CSV Document
 notes.csv	Today at 10:55 AM	252 bytes	CSV Document
 ordernotes.csv	Today at 10:55 AM	608 bytes	CSV Document
 prescriptions.csv	Today at 10:55 AM	284 bytes	CSV Document
 problems.csv	Today at 10:55 AM	426 bytes	CSV Document
 README.txt	Today at 10:55 AM	88 bytes	Plain Text
 results.csv	Today at 10:55 AM	854 bytes	CSV Document
 smokingstatus.csv	Today at 10:55 AM	114 bytes	CSV Document
 vitals.csv	Today at 10:55 AM	497 bytes	CSV Document

# Chart Export

*How do I get started?*



Visit [learn.pcc.com](https://learn.pcc.com) to learn more about the tool



Carefully consider who should have Chart Export permissions at your practice



Chart Export permissions can be granted through User Administration

# Bidirectional Immunizations

*What is it?*

The ability to



*submit* your patients' immunization data to your immunization registry and

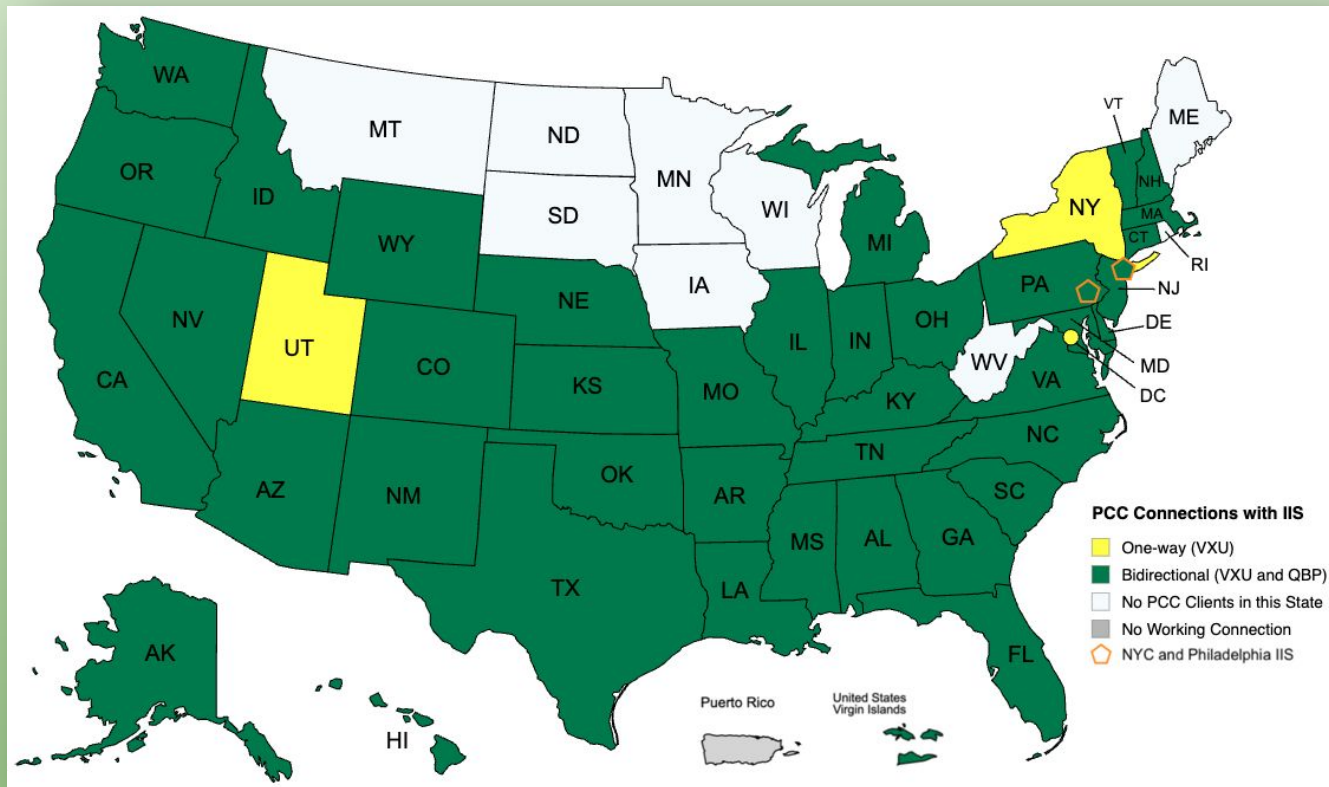


*retrieve* immunization data from your immunization registry and import it into your patient's chart in PCC EHR

## Bidirectional Immunizations

## What is it?

## PCC's Immunization Registry Connections



# Bidirectional Immunizations

*Why would I use this solution?*

## Submission



Electronically submit immunization data to your registry

## Retrieval



Verify your new patient's vaccine history and import the data into PCC EHR



Check to see if your patient received any vaccinations outside of your practice



# Bidirectional Immunizations

*How does it work?*

## Submission



Automated triggers in PCC EHR submit patient immunization data to the immunization registry



Submission models are custom for registry jurisdictions (timing, supported trigger interactions)



Proper immunization configuration is key (CVX, VFC, NDC)

# Bidirectional Immunizations

*How does it work?*

## Submission

Some registries return responses that can be viewed in PCC EHR.

Immunization Registry Response Viewer

Search Filter:

Date/Time Received	Patient Name	PCC #	Response Status	Errors	Warnings	Reviewed
07/29/24 4:05pm	Todd Gack	31255	Submission Contained Errors/Warnings	1	0	✓
07/29/24 4:05pm	David Puddy	213872	Submission Contained Errors/Warnings	3	0	
07/29/24 3:05pm	Sue Ellen Mischke	27724	Submission Contained Errors/Warnings	0	1	
07/29/24 12:05pm	Timothy Whatley	212525	Submission Contained Errors/Warnings	0	1	✓
07/29/24 11:05am	Susan Ross	25717	Submission Contained Errors/Warnings	0	1	
07/29/24 10:05am	Robert Sacamano	214407	Submission Contained Errors/Warnings	1	0	

Filter by response severity, date, and review status.

Response Severity:  Dates: ☐ All ☒ From  to  Reviewed:

Care Center:

Page  / 1

# Bidirectional Immunizations

How does it work?

## Submission

Immunization Registry Response Viewer

Immunization Registry Response Viewer

Lloyd Braun

17 yrs, 10 mos

06/28/07

M

Response - 10/24/24 8:02pm (Submission Contained Errors/Warnings)

Patient Demographics

	Submitted Data	Response Severity	Response Message	Response Notes
Phone Number - Home	(888) 888-888 X.400 n/a	Warning	PATIENT HOME EMAIL FORMAT IS INVALID.	
Relationship	EXF Uncle HL70063	Error	NK1 CONTACT RELATIONSHIP IS INVALID.	

Immunization data submitted to New Jersey Immunization Information System (NJIIS) on 10/24/24 at 7:00pm

View only Errors and Warnings or the registry's full response.

Mark as reviewed once the review is complete.

Open the patient's chart to make corrections.

Display: ☒ Errors and Warnings Only ☐ Full Report

☒ Reviewed by

PCC PCC

at

05/22/25

3:22pm

Open Chart

Save + Next


Cancel

Save

# Bidirectional Immunizations

How does it work?

## Retrieval



FIND

Janis Joplin

PCC# 4091

Medical Summary

Demographics

History

Visit History

**Immunization History**

Flowsheets

Growth Charts

Documents

Billing History

PCC eRx

Create Visit

Immunization History

Janis Joplin 9 yrs, 2 mos 03/01/16 F

Vaccines

Flublok Quad Pres Free

Beyfortus

Ordered

Diseases

There are no vaccine-preventable diseases for this patient

Forecasting Results

Last updated: 05/09/25 04:20pm

☒ Show Informational Warnings(0) 

Refresh

Vaccine Family	Dose #	Recommended Date	Minimum Date	Past Due Date	Maximum Date
Flu	1st	07/01/2024 (8y 4m)	07/01/2024	03/01/2136	03/01/2136
COVID-19	1st	08/22/2024 (8y 5m)	08/22/2024	03/01/2136	03/01/2136
HPV	1st	03/01/2027 (11y)	03/01/2025	03/28/2029	03/01/2136
Hep-B 3 Dose	1st	05/01/2016 (2m)	03/29/2016	06/28/2016	03/01/2136
Polio	1st	05/01/2016 (2m)	04/12/2016	06/28/2016	03/01/2136
MMR	1st	03/01/2017 (1y)	03/01/2017	07/28/2017	03/01/2136
Varicella	1st	03/01/2017 (1y)	03/01/2017	07/28/2017	03/01/2136
Hep-A	1st	03/01/2017 (1y)	03/01/2017	03/28/2018	03/01/2136
DTaP/DT/Td/Tdap	1st	03/01/2023 (7y)	03/01/2023	03/01/2023	03/01/2136
Meningococcal	1st	03/01/2027 (11y)	03/01/2027	03/28/2029	03/01/2136

Forecast results are not intended to replace clinical decision making

Retrieve Imms

Print

Add Imms

Edit Imms

Add Phone Note

Add Portal Message

Close

Save

Save + Exit

1

0

0

Chat

PCC News

Signed in: jmarsala at Winooski •

**UC2025**  
BUILDING SOMETHING AWESOME!

**PCC**  
Pediatric EHR Solutions

# Bidirectional Immunizations

*How does it work?*

## Retrieval

Retrieve Immunizations

Retrieve Immunizations - Confirm Patient Match

Patient Demographics	PCC EHR	CAIR
Patient Name	Janis Joplin	JANIS JOPLIN
Date of Birth	03/01/2016	03/01/2016
Sex	Female	F
Home Address	16 Moonbeam Half Moon Bay, CA 94019	16 MOONBEAM HALF MOON BAY, CA 94019
Mother's Maiden Name		JULIE JOPLIN
Multiple Birth	Undetermined	No

Cancel

Next

Confirm the patient match before proceeding.



# Bidirectional Immunizations

How does it work?

## Retrieval

Retrieve Immunizations

Retrieve Immunizations - Results

Janis Joplin 9 yrs, 2 mos 03/01/16 F

Vaccine History (CAIR)

Anthrax	CI 04/12/2009	
DTaP-NOS	REFUSED 10/10/2009	
DTaP-HepB-IPV	05/01/2016	07/01/2016
Hib-PRP-T	05/01/2016	07/01/2016
No vaccine administered	04/12/2009	
PCV13	05/01/2016	07/01/2016

Diseases (CAIR)

HISTORY OF HEP B INFECTION	04/12/2009
----------------------------	------------

Forecasting Results (CAIR)

Vaccine Family	Dose #	Recommended Date	Minimum Date	Past Due Date	Maximum Date
DTP/aP	3rd	07/29/2017 (1y 4m)	07/29/2016	07/01/2019	
HepA	1st	03/01/2017 (1y)	03/01/2017		
HepB	3rd	09/01/2016 (6m)	08/26/2016		
Hib	4th	03/01/2017 (1y)	03/01/2017		
Influenza-seasnl	1st	08/01/2020 (4y 5m)	09/01/2019	07/01/2021	
MMR	0th	03/01/2017 (1y)	03/01/2017		
PneumoConjugate	4th	03/01/2017 (1y)	03/01/2017		
Polio	4th	03/01/2020 (4y)	03/01/2020		
Varicella	1st	03/01/2017 (1y)	03/01/2017		

Back

Close

Next

Black dates are in the patient's Imms History in PCC EHR already.

Orange dates are *not* in the patient's Imms History in PCC EHR yet.

Some registries provide diseases and forecasting results.



# Bidirectional Immunizations

How does it work?

## Retrieval

Select which dates to import into the patient's Immunization History.

Retrieve Immunizations

Retrieve Immunizations - Import

Janis Joplin 9 yrs, 2 mos 03/01/16 F

Selected immunizations will be added to the patient's Immunization History.

☒ Hib-PRP-T (CVX 48) as Hib-PRP-T

☒ 05/01/2016

☒ 07/01/2016

☐ Anthrax (CVX 24) - Not configured in PCC EHR

☐ 04/12/2009 Contraindicated (Lot#: wxyz)

☐ DTAP-NOS (CVX 107) - Not configured in PCC EHR

☐ 10/10/2009 Refused (Lot#: abc1234)

Back

Close

Import

Vaccines that have not been configured in PCC EHR cannot be imported.



# Bidirectional Immunizations

*How do I get started?*



Check the [Immunization Connections](#) map to determine what types of connections are available in your state or jurisdiction



Contact your Client Advocate and express your interest



An implementation specialist will reach out with more information about the steps to onboard your practice



# How Else Does PCC Keep You Connected?



Besides the interactive features, PCC supports the automated integration of your data with a variety of care delivery partners, depending on your needs.



These integrations are handled as individual projects, and generally involve PCC working directly with personnel from external organizations in order to establish connectivity and data exchange methods that meet the needs of the specific use case.

# Common Integration Use Cases



Public Health Reporting



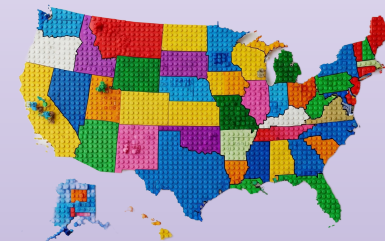
Health Information Exchange (HIE)



Provider networks (CIN, ACO, IPN, etc.)

# Common Integration Use Cases

## *Public Health Reporting*



Certain state Departments of Health support automated reporting of specific results, such as Lead and COVID.



These integrations are fairly non-standard, and can vary widely depending on state capacities.



If your state supports an automated/integrated reporting option like this, you can request that PCC work with them to get it set up. We will address these requests based on the compatibility and engagement of the state DOH.

# Common Integration Use Cases

## *Public Health Reporting*

Existing integrations include:



### **Lead reporting**

MI, IL, NH, AZ, OH



### **COVID reporting**

OH, IL, MN, OK



# Common Integration Use Cases

## *Health Information Exchange (HIE)*



PCC assists in integrating customer data with a number of Health Information Exchanges (HIEs) around the country.



These integrations typically take the form of outbound demographic and clinical document (HL7 CCD) feeds that automatically propagate EHR data to the HIE.



Many HIEs are also Carequality Connections (either directly or via eHealth Exchange), in which case PCC users can retrieve data from them with CDE.

# Common Integration Use Cases

*Provider Networks (CIN, ACO, IPN, etc.)*



PCC works with various provider networks to help providers share data for purposes like care coordination and clinical quality measures tracking.



Depending on the needs of a network and its constituent practices, the specifics of data integration can vary, sometimes requiring custom exports or even read-only remote database access agreements.

# Common Integration Use Cases

*How do I get started?*



Access the Interoperability Request Form

<https://www.pcc.com/interoperability/request/>

Password: interop!PCC



Gather required information



Complete and submit the Request Form

The screenshot shows the PCC Pediatric EHR Solutions Interoperability Request Form. The header includes the PCC logo and navigation links: Request & IT Connect, Interoperability, Data, and Client Support. The main title is "PCC Interoperability Request Form". Below the title, there is a paragraph explaining the purpose of the form and a link to "Interoperability Data and Pricing with PCC". The form is divided into several sections: Practice Details (Practice Name, Contact Name, Contact Email), 3rd-Party Vendor Details (Vendor Name, Contact Name, Contact Email, Contact Phone, Technical Contact Name, Technical Contact Email), Schedule (When will your practice be ready to begin work on this project?, When will your vendor be ready to begin work on this project?), and Project Details (Please describe the purpose of this interoperability project, What types of data do you intend to exchange with whom and for what reasons?).

Please fill out the course survey in the app



# Q&A