



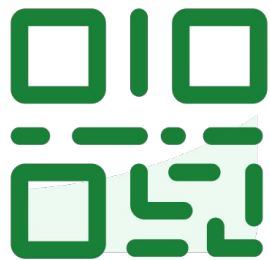
***WHAT'S NEW
WHAT'S NEXT***

In this course, we will cover:

- What's New
 - What PCC has delivered in the past 12 months
- What's Next
 - What PCC is looking to deliver in the next 12 months
- Related UC Sessions

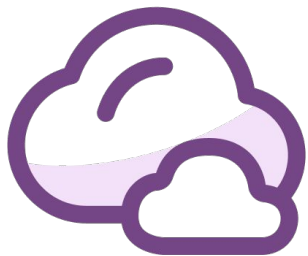
We want to hear from you!

No one can tell us just as accurately about the best features we've delivered in the last year than YOU!



Join at **slido.com**
#2098185





What is your favorite PCC EHR feature delivered in the past year?





Clinical Data Exchange (CDX)

**Jennifer Marsala
Morgan Ellixson-Boyea**

Building Bridges



PCC EHR



Provider Organizations

Lab Facilities

CINs

HIEs

ACOs

State Depts. of Health

Immunization Registries

CDX Conference Sessions

Are You Sharing Data Like It's 2025?

Jennifer Marsala, Scott Kirby, Fisher Wagg

PCC is continually improving tools for sharing clinical data. Are you using them? Follow along as PCC's clinical data exchange experts share their best advice about which tools exist to help you fulfill record requests, complete referrals, and coordinate patient care with specialists and hospitals.

Wednesday, 1:15PM in Emerald I

Peer Perspective: Making Clinical Interoperability Work for Your Practice

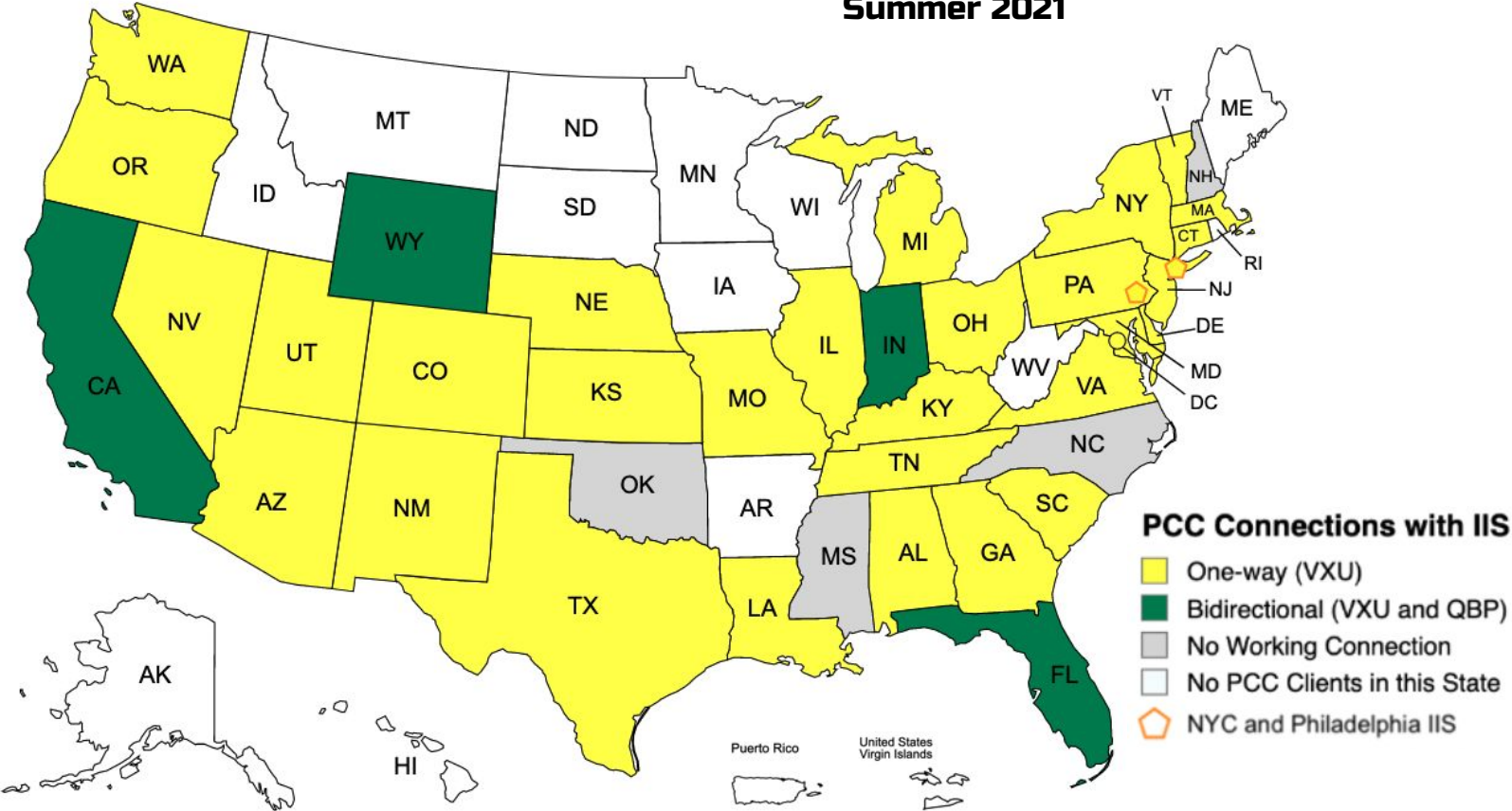
Sarah Gliech, Brian LaClair, Dr. Sharlene Matthieu, Judy Rapoza, Kim Railey

Integrating new technology, workflows, and connections to clinical partners can feel like a hassle. You want the benefits but you feel uncertain the effort will pay off! Learn from a panel of peers who took the leap and are integrating technology and partnerships in ways that make practicing medicine easier and more effective.

Thursday, 1:15PM in Emerald I

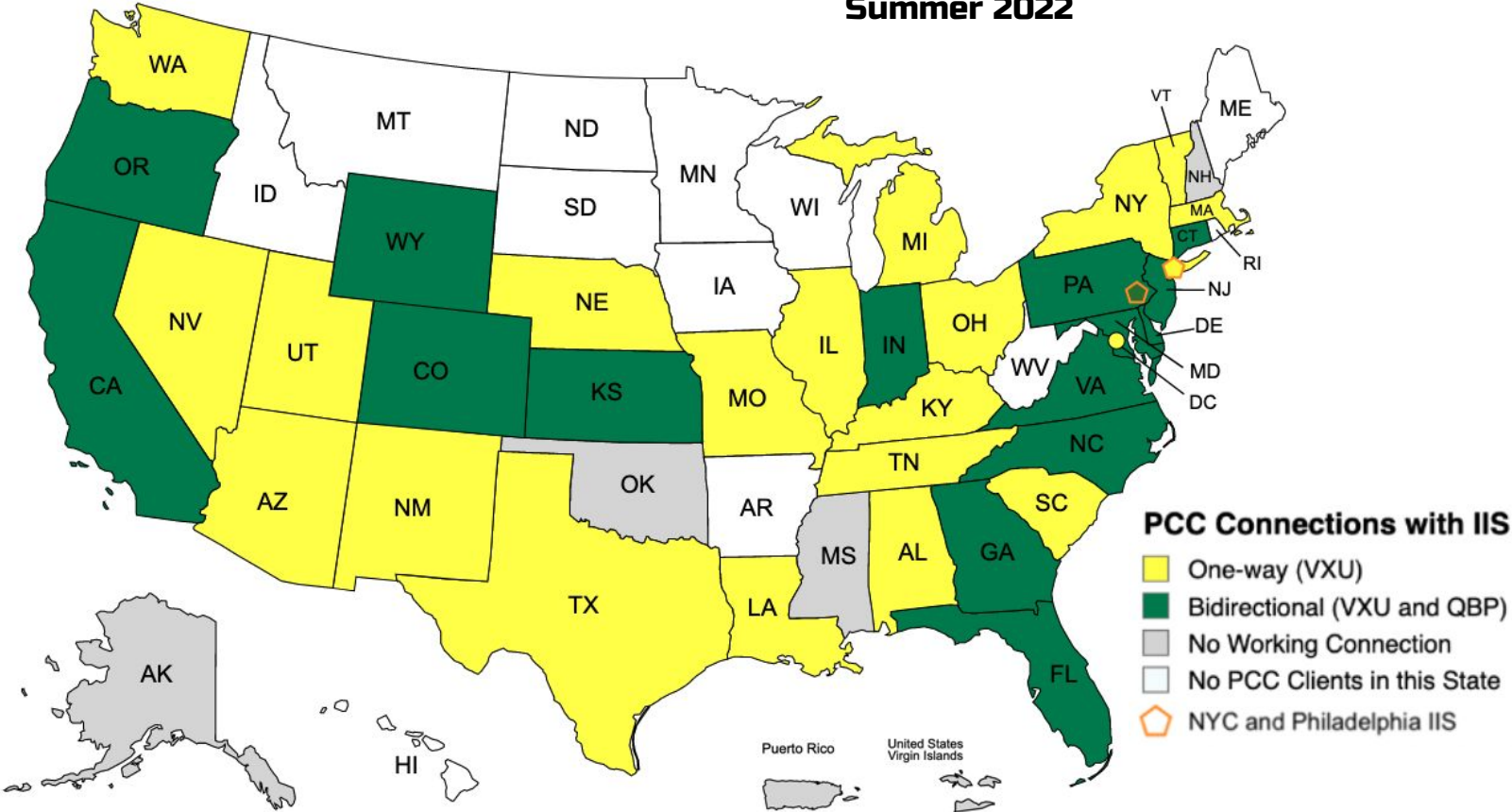
Immunization Registry Connections

Summer 2021



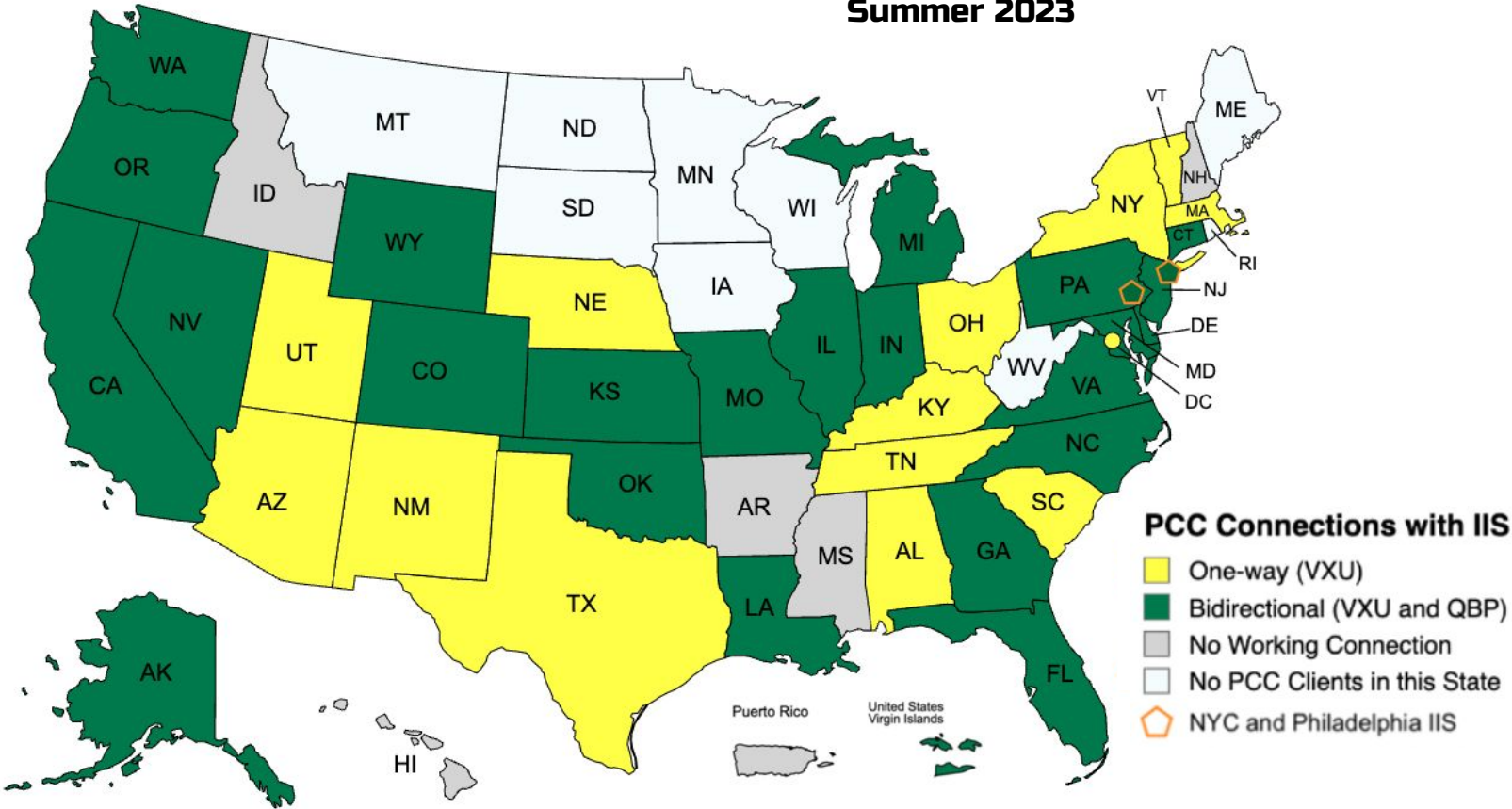
Immunization Registry Connections

Summer 2022



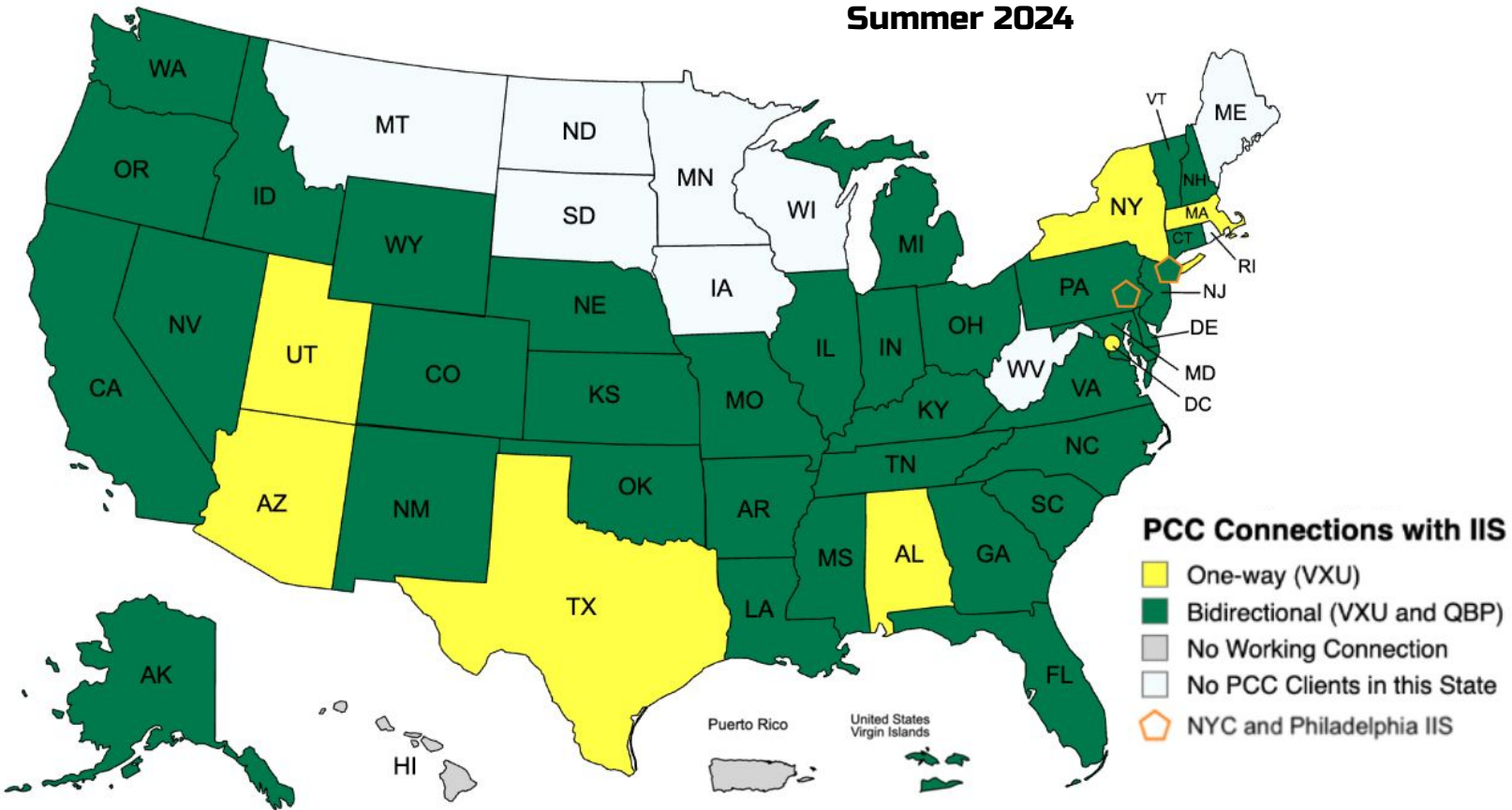
Immunization Registry Connections

Summer 2023



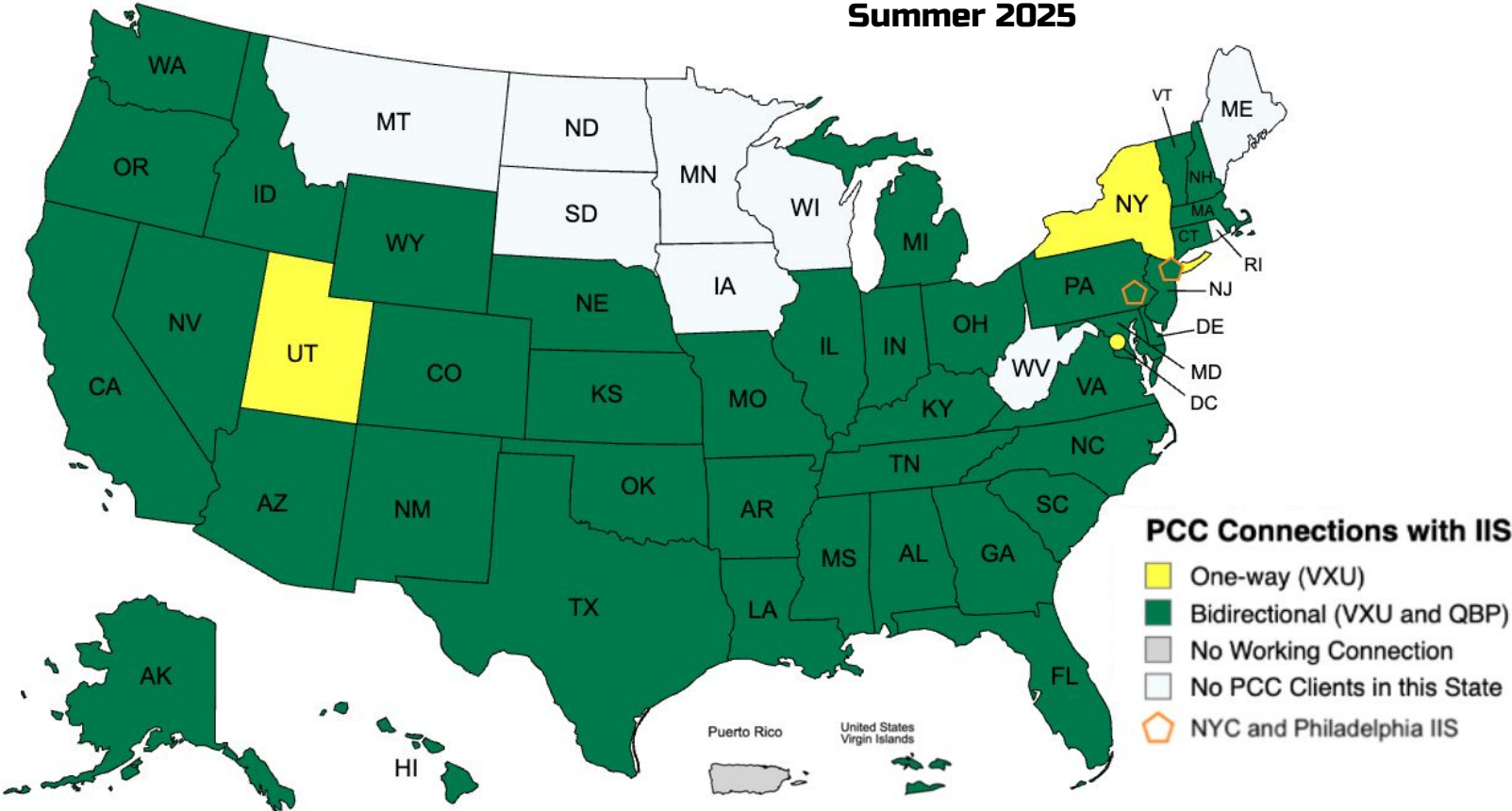
Immunization Registry Connections

Summer 2024



Immunization Registry Connections

Summer 2025



Immunization Conference Sessions

The Complete Guide to Vaccine Administration

Brian Kennedy, Romni Palmer, Jim Smith

Vaccines are the backbone of your pediatric practice, providing lifelong protection to patients and a steady source of income. But they're a lot to manage. Stop stress in its tracks and learn how to manage vaccines like a pro! PCC experts share everything you need to know to confidently manage your vaccine apparatus, from configuration to refrigeration, to giving shots and reconciling lots.

Thursday, 10:30AM in Emerald I

Immunization Registry Walk-In Clinic

Romni Palmer, Jake Styles, Fisher Wagg, Alex Whitehouse

Like the icy crystals first photographed by Vermont's own Snowflake Bentley, each immunization registry is unique. Luckily, PCC is in the house to answer your questions about workflows, reporting, errors, and more. Stop by anytime for expert help tailored to your registry and its requirements.

Thursday, 2:30PM in Diamond II - PCC Resource Center

What's New?

Chart Export: Exclude Phone Notes

A screenshot of a 'Chart Export' dialog box. At the top, it says 'Chart Export' and shows patient information: 'Todd Gack', '10 yrs, 10 mos', '06/17/14', and 'M'. Below this, it states: 'Export all charted information and documents for this patient to an encrypted file. This process may take a few minutes to complete.' It then asks for an encryption password, showing 'FTz9CML4d7cW10A' and a 'Copy' button. There are three unchecked checkboxes: 'Include Confidential Content' (with sub-items 'Confidential Components' and 'Confidential Notes'), 'Include Sexual Orientation and Gender Identity' (with note '(Privacy Status: Private)'), and 'Include Portal Messages' (with note '(May contain sensitive information)' and sub-item 'Portal users with messages for this patient: Jen Marsala'). A red arrow points to the fourth unchecked checkbox, 'Include Phone Notes' (with note '(May contain sensitive information)'). At the bottom right are 'Cancel' and 'Export' buttons.

What's New?

Specimen Label Printing



PCC EHR

Todd Gack PCC# 3484

Medical Summary

Demographics

History

PCC eRx

Visit: 04/29/25

Sick - Bright Futures

Appointments

Intake

Vitals

History

Review of Systems

Social/Family History

Physical Exam

Diagnoses

Lab

Medical Test

Radiology

Medical Procedures

Immunizations

Plan

Forms

Sick - Bright Futures

Lab

Order Rapid Strep

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

Print Labels Generate Requisition

Print Specimen Labels

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

CBC

☒ Print 1 label(s)

☐ Specimen Collected: By enter user name mm/dd/yy 12:00 AM Date: Time:

☒ Specimen Source: Unspecified Other (please specify) Biopsy, Skin Stool, Fecal Urine Unspecified Wound Wart

enter source notes

Gack, Todd
DOB: 06/17/14
Date: Time:

5 02:14 PM
(n catch)

Cancel Save + Print

Previous Next Bill Sign Close Save Save + Exit

2 0 0 Chat PCC News Signed in: jmarsala at Winooski

What's Next?



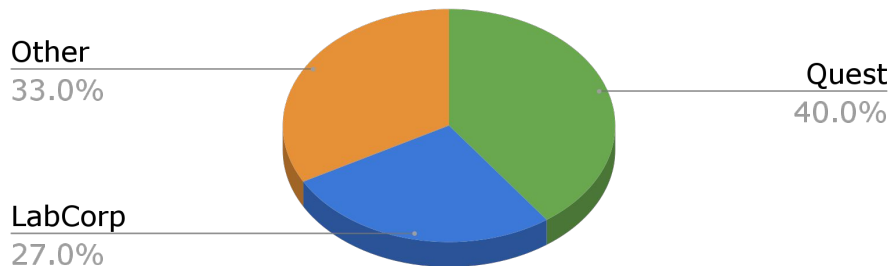
Electronic Lab Ordering in PCC EHR

What's Next?

Electronic Lab Ordering Roadmap



Lab Result Connections Across PCC Clients



Electronic ordering to Quest will pave the way for other labs.

What's Next?

Electronic Lab Ordering in PCC EHR

PCC EHR

15-17 Yr We - TLC

Jennifer Marsala 17 yrs, 2 mos 03/05/08 F

Lab

ALDOSTERONE, 24-HOUR (U) Elab

Electronic Requisition Needed - No Tasks

Facility: Quest Diagnostics (QUEST-PHP) 1 Order Entry Question

Specimen Collected: Bv Jen Marsala 05/23/25 05:05 PM

Order Date: 05/23/25

EDITING

ALDOSTERONE, 24-HOUR (U) Elab

Electronic Requisition Needed - No Tasks

Facility: Quest Diagnostics (QUEST-PHP)

☐ Specimen Collected: By [enter user name] mm/dd

☐ Specimen Source: Other (please specify) Specimen N

Status: Electronic requisition needed for QUEST-PHP

Note: [enter notes]

☒ Signature Required

☒ Include on Patient Reports

ADD TASK

Questions (1)

Order Entry Questions

Answers are optional, but may result in QUEST-PHP contacting the practice for additional information.

ALDOSTERONE, 24-HOUR (U) Elab

TOTAL VOLUME


[contraindicated] [Canceled]

CHANGES **SAVE ORDER**

Cancel **Save**

What's Next?

Electronic Lab Ordering in PCC EHR

 **PCC EHR**

Jennifer Marsala **PCC# 4042**

Medical Summary

Demographics

History

Visit: 05/23/25

15-17 Yr Well - TLC

Lab



ALDOSTERONE

[DETAILS](#)

Facility: Quest

Specimen Collection: Blood

Status: Electronic

SIGNATURE

Generate Lab Requisition

Facility:

Form:

Specimen Collection

☒ In-office

☐ At laboratory Requested Collection Date:

Requisition Orders

☒ ALDOSTERONE, 24-HOUR (U) Elab

Diagnoses

☒ R53.81 Other malaise

☒ R53.83 Other fatigue

Instructions

☐ STAT

☐ Call with STAT results

☐ Fasting

Billing:

Additional Billing:

Primary: Cigna PPO \$10

2 mos 03/05/08 F

Order Date: 05/23/25

Construction Zone

PCC eRx: A Year in Review



PCC eRx: A Year in Review

Prescribing from pocketPCC



☰ pocketPCC PCC eRx ⓘ

JERRY GARCIA
Age: 3 yrs 2 mos
DOB: 10/01/2021
Sex: Male
PCC#: 4033

PBM Payer Name: PBMX
Retail + Mail Order +
Plan Name: FLORIDA-WEB

PBM Payer Name: PROINFORMA PBM
Retail + Mail Order + LTC +
Plan Name: PRO-FL_55402
[Demographics]

Last queried: 2024-12-03 13:42:30.2-05

Vitals
Weight: no data
Height/Length: no data
Blood Pressure: no data

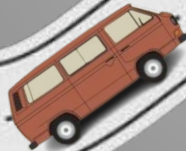
Pharmacies

| Pharmacy | |
|------------------------------|---|
| Default pharmacy | |
| ✓ | Friendly Pharmacy, Inc. 389 East 138 Street, Bronx, NY 10454 Retail, Supports Digital Signature, Accepts EPCS Phone: (718) 742-0001 Fax: (718) 742-0011 |
| Add Pharmacy | |

Allergies Allergy List not yet reviewed



What's Next for PCC eRx?



Upcoming Changes for Resend








“Wait - What’s Resend?”


Review & Sign

Prescriptions
Group By: ☐ Indication ☐ Class ☐ Generic med name ☒ None

Ready Medication

Resend   

*** Current production experience ***

LISDEXAMFETAMINE (VYVANSE CAPSULE)
20 mg capsule
30 Capsule(s), 0 refills
Start: 11/14/2023
Pharmacy: CVS/pharmacy #11037
eRx: 11/14/2023 16:46:56 
(Prescribed by: MORGAN ELLIXSON-BOYEA)

Links:
[Daily Med - Drug Reference Materials](#)
[State of Vermont Prescription Monitoring Program](#)

Finalize Prescriptions **Print Medication Instructions**

*Resend:
Only when you want to!*

- ❁ Use Resend to:
 - A) Switch to a different pharmacy
 - B) Edit prescription and send back to original pharmacy or
- ❁ Resend button displays for ALL prescriptions & does not indicate an issue
- ❁ Automatically deletes original rx & sends cancellation to the pharmacy
- ❁ Subsequent Rx will also show option to Resend
- ❁ Only available for 7 days!


Resend: Better Experience for Triage Staff with Controlled & Legend Drugs




PETER PLANT
Male, DOB 08/15/2012
5705 Roush Road
Westminster Station, VT 05159
Phone (802) 555-0120


MORGAN ELLIXSON-BOYE
Winooski Pediatrics
20 Main St
Winooski, VT 05404-1111
Phone (802) 846-8177
DEA # MT9445619

North Bronx Pharmacy
4166 White Plains Rd
Bronx, NY 104663020
Fax (718) 925-4112
Phone (718) 925-4114
accepts EPCS

dexamethylphenidate ER 20 mg capsule, extended release biphasic 50-50 (Focalin XR) 
1 capsule(s) By Mouth every morning
NDC: 00093555301
30 Capsule(s), 0 Refills
Days Supply: 30
Written Date: 07/02/2025

eRx 

Test Case: 



Nursing & Triage Staff can now adjust pharmacy or any other pertinent information



Resend Reason:

Friendly Pharm OOS. Unable to determine inventory over phone - but trying this other pharmacy.

Add to Favorites

Cancel

Save

Required: Add a Resend Reason for the Ordering Provider and Save



Resend: Pending Prescriptions Now Available for Provider via Rx Queue



Provider can now sign & send the Pending Resend from Review & Sign or Rx Queue

Review & Sign

Prescriptions
Group By: ☐ Indication ☐ Class ☐ Generic med name ☒ None

| Status | Medication |
|--|--|
| <input type="checkbox"/> Ready to send | DEXMETHYLPHENIDATE (FOCALIN XR (BIPHASIC 50-50) EXTENDED RELEASE CAPSULE) 20 mg capsule,ER biphasic 50-50 30 Capsule(s), 0 refills <input type="checkbox"/> DAW Start: 06/20/2025 Pharmacy: North Bronx Pharmacy UNSIGNED (Created by: ZELDA ZEN, LNA) |

Pending Resend
Friendly Pharm OOS. Unable to determine inventory over phone - but trying this other pharmacy.

LITTLEFIELD, LILY 794 Redwood Street Andover, NH 05501 Phone (802) 555-0186

| | | | | | |
|--------------------------|--------------------------|--|--|--|---|
| <input type="checkbox"/> | <input type="checkbox"/> | | | dexmethylphenidate ER 20 mg capsule,extended release biphasic50-50 (Focalin XR) 1 capsule(s) By Mouth every morning 30 Capsule(s) 0 Refill(s) <input type="checkbox"/> DAW Created on 06/20/2025 16:22 by ZELDA ZEN, LNA | North Bronx Pharmacy 4166 White Plains Rd Bronx, NY 104663020 (718) 925-4114 |
|--------------------------|--------------------------|--|--|--|---|

Pending Resend
Friendly Pharm OOS. Unable to determine inventory over phone - but trying this other pharmacy.

Additional Changes for Resend Functionality



- ❁ **Allow Resend from Prescription History**
- ❁ **Make it more obvious when a prescription is successful**
- ❁ **Prevent “Resend” if no changes have been made**



Improvements for 3 Month Supplies



Flexibility to Manage & Resend within 3 Month Supplies



| Prescription History | | |
|----------------------|--|--|
| | Start/Stop | Prescription |
| | 06/30/2025 09/27/2025 3 month supply | Vyvanse 20 mg capsule Schedule II 1 capsule(s) By Mouth every morning 30 Capsule(s) 0 Refill(s) |
| Resend | 3 month supply | |
| | | |



Resend Prescription

Select the prescriptions from the 3 month supply you wish to resend.

- ☒ 06/30/2025
- ☒ 07/30/2025
- ☒ 08/29/2025

Easily reroute individual prescriptions within a 3-Month Supply via Resend in Prescription Hx

Introducing: Send Now or Send Later for 3-Month Supplies



Days Supply: 30 ☐ DAW

Dispense: 30 Capsule

Number of Refills: ☐ PRN

Date to Fill #1: 06/03/2025 ☒ Create 3 month supply


Date to Fill #2: 07/03/2025

Date to Fill #3: 08/02/2025

Send first, save remaining to send later: ☐

Prevent Renewal Requests: ☐

Follow up provider:

Real-Time Pricing 
Covered with restrictions
Prior Auth Not Required

**Send All 3 Prescriptions
Now (existing
behavior)**

Days Supply: 30 ☐ DAW

Dispense: 30 Capsule

Number of Refills: ☐ PRN

Date to Fill #1: 06/03/2025 ☒ Create 3 month supply


Date to Fill #2: 07/03/2025

Date to Fill #3: 08/02/2025

Send first, save remaining to send later: ☒

Prevent Renewal Requests: ☐

Follow up provider:

Real-Time Pricing 
Covered with restrictions
Prior Auth Not Required

**Or... Send Month
#1 Now, and let
PCC eRx queue
M2 & M3 to send at
a future date**

Configure on the fly at the point of prescribing

Send Later: Process Month 2 and Month 3 via Rx Queue



*Thirty days
later... **



Pending Prescriptions

☐ Select all

PLANT, PETER 5705 Roush Road Westminster Station, VT 05159 Phone (802) 555-0120

☐☐

Pending Rx 2 of 3:
3 month supply started on 06/03/2025

ADDERALL XR 5 MG CAPSULE
1 capsule(s) By Mouth every day
30 Capsule(s) 0 Refill(s) ☐ DAW
Dates to Fill:
07/03/2025
08/02/2025
Created on 06/03/2025 23:34 by MORGAN ELLIXSON-BOYEA

Yalaha Pharmacy
8735 County Rd 48
Yalaha, FL 34797
(352) 547-1247

[Process UNSIGNED prescriptions](#)

** Number of days based on your personal config*

**Month 2 and Month 3 will appear on Rx Queue for sending
by provider via EPCS**

What's Next: Two Month Supplies!



Add New Med [\(start over\)](#)

DEXMETHYLPHENIDATE (FOCALIN XR (BIPHASIC 50-50) EXTENDED RELEASE CAPSULE)

Qty: to

[\(show all\)](#) [\(show all\)](#) ☐ PRN

Prescription:

Days Supply: ☐ DAW

Dispense:

Number of Refills: ☐ PRN

Date to Fill #1: ☒ Create 3 month supply

Date to Fill #2:

Date to Fill #3:

Send first, save remaining to send later: ☐

Prevent Renewal Requests: ☐

Follow up provider:

Real-Time Pricing
Covered with restrictions
Prior Auth Not Required

***Easily create a 2 month supply
by removing the third date &
save/send***

***Prescription Hx will reflect
2 month supply***

Prescription History

| Start/Stop | Prescription | Prescriber/Agent |
|---|--|-----------------------|
| 06/30/2025 08/28/2025 2 month supply | Focalin XR 5 mg capsule,ER biphasic 50-50 Schedule II 1 capsule(s) By Mouth every morning 30 Capsule(s) 0 Refill(s) | MORGAN ELLIXSON-BOYEA |

... But wait! There's more!





Issues with Concerta - Production

BROOK BOWMAN
Female, DOB 08/04/2009
73 Tanglewood
Lyndon, VT 05849
Phone (802) 555-0105

MORGAN ELLIXSON-BOYEA
Lake Champlain Pediatrics
Upper Lake Street
Uptown, VT 05404-1111
Phone (800) 722-2198
DEA # MT9445619

Friendly Pharmacy
223A W 231st St
Bronx, NY 104635301
Phone (718) 884-2908
Fax (718) 884-2904
accepts EPCS

methylphenidate ER 18 mg tablet,extended release 24 hr
18 milligrams By Mouth every morning
30 Tablet, 0 Refills
Days Supply: 30
Written Date: 06/30/2025

eRx

Test Case:



NewRx Message Data

PATIENT
BROOK BOWMAN
Gender: F, DOB: 08/04/2009
73 Tanglewood
Lyndon, VT 05849
Primary: (802) 555-0105
Work: (802) 555-0107

PRESCRIBED MEDICATION
methylphenidate ER 18 mg tablet,extended release 24 hr
1 tablet(s) By Mouth every morning
Days Supply: 30
30 Tablet, 0 Refill(s)
Substitutions permitted
Written Date: 06/30/2025
NDC: 62175031037

[message XML](#)

Currently, PCC eRx sends a BX rated option

- ❁ Not all “Generic Concerta” tablets or methylphenidate ER options are created equal
- ❁ NDC sent to pharmacy only visible *after* sending
- ❁ Pushback from pharmacies about ability to substitute

FDA's Orange Book:
For any generic to be considered therapeutically equivalent to Concerta, it needs to be AB rated
8 AB Rated NDC's
2 BX Rated NDC's

Coming Soon: Ability to See & Edit NDCs



BROOK BOWMAN
Female, DOB 08/14/2009
73 Tanglewood
Lyndon, VT 05849
Phone (802) 555-0105

MORGAN ELLIXSON-BOYEA
Lake Champlain Pediatrics
Upper Lake Street
Upton, VT 05404-1111
Phone (800) 722-2198
DEA # MT9445619

Friendly Pharmacy
223A W 231st St
Bronx, NY 104635301
Phone (718) 884-2908
Fax (718) 884-2904
accepts EPCS

methylphenidate ER 18 mg tablet (OROS)
1 tablet(s) By Mouth every morning
NDC: 62037072501
30 Tablet(s), 0 Refills
Days Supply: 30
Written Date: 06/30/2025

eRx

Test Case:

Edit eRx details

Customize the medication name and NDC that will be sent to the pharmacist. The NDC will be saved and used automatically the next time you prescribe this medication.

ePrescribing Name

Recommended

- ☒ methylphenidate ER 18 mg tablet (OROS)
- ☐ methylphenidate ER 18 mg tablet, extended release 24 hr (Concerta)
- ☐ Concerta 18 mg tablet extended release 24hr

NDC descriptions

- ☐ CONCERTA ER 18 MG TABLET
- ☐ METHYLPHENIDATE ER 18 MG TAB
- ☐ RELEXXII ER 18 MG TABLET

NDC [Orange Book Code Key](#)

- ☒ 62037072501 **METHYLPHENIDATE ER 18 MG TAB**
Mfg: ACTAVIS/TEVA
Orange Book: AB
- ☐ 13811070610 **METHYLPHENIDATE ER 18 MG TAB**
Mfg: TRIGEN LABORATO
Orange Book: AB
- ☐ 31722095201 **METHYLPHENIDATE ER 18 MG TAB**

Select your preferred nomenclature for any drug in PCC eRx (only on outbound prescriptions)

With the 10.4 Release, generic Concerta will include an OROS option

PCC eRx will now send an AB rated NDC by default for generic Concerta

Users can select their preferred NDC or respond to pharmacy requested NDCs if needed

Introducing: Snap Text inside PCC eRx



PREDNISONE ❤️

Dose Form: 10 mg tablet ▼

Prescription:

Days Supply: 35

Dispense: 74 Tablet ▼

Number of Refills: ☐ PRN

Date to Fill:

Prevent Renewal Requests: ☐

Follow up provider: ▼

Formulary Summary
Generic, Rx, Preferred Level 2
Copay: Retail: Tier 1/1

Instructions to Patient: #pred10

Comments to Pharmacy:

***Snap Texts from
PCC EHR are now
available for use inside
PCC eRx and mobile
prescribing via
pocketPCC!***

Instructions to Patient:

Tk 4 tabs po for 7 days, tk 3 tabs QD for 7 days, tk 2 tabs QD for 7 days, tk 1 tab QD for 7 days, tk 1/2 tab QD for 7 days, then stop

CHRIS CEDERSTROM
Male, DOB 09/29/2013
8454 Hillsdale Road
Sheldon Springs, VT 05485
Phone (802) 555-0165

MORGAN ELLIXSON-BOYEA
Winooski Pediatrics
20 Main St
Winooski, VT 05404-1111
Phone (802) 846-8177
DEA # MT9445619

Shollenberger Pharmacy
2002 S. McDowell Blvd Ext
Petaluma, CA 94954
Phone (707) 984-5571
Fax (707) 988-4744
accepts EPCS

prednisone 10 mg tablet

Tk 4 tabs po for 7 days, tk 3 tabs QD for 7 days, tk 2 tabs QD for 7 days, tk 1 tab QD for 7 days, tk 1/2 tab QD for 7 days, then stop
NDC: 5486846400
74 Tablet, 0 Refills
Days Supply: 35
Written Date: 06/19/2025

eRx ▼

Process Now

This Week at UC 2025

Let's Talk about PCC eRx!

Friday 7/18

Are You ePrescribing Like it's 2025?
(Review of New Features, Roadmap, & More!)

With Morgan Ellixson-Boyea, CPhT, CSPO
Emerald I @ 1015am EST

eRx Walk-in Clinic

Hosted by eRx Team
Diamond II @ 115pm EST

Ensure Success

A collection of various tools including a hammer, pliers, wrench, screwdrivers, a tape measure, and brushes, arranged in a cluster.

Mark Hurne
Nick Meunier
Althea Beagley

What's New

Portal Messaging

- Patient Name in bold
- Search for messages by text
- See messages when replying
- No need to leave the draft message



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

All Messages

- 08/19/24 - **Dana** Ergonomics Document >
- 08/19/24 - **Blake** Ear piercing infection? >
- 08/19/24 - **Jose** Appointment Request >
- 08/19/24 - **Kellyn** School Forms Request >
- 08/19/24 - **Jose** Rash >
- 08/19/24 - **Dana** Test Results >
- 08/19/24 - **Andrew** School Forms Request >
- 08/19/24 - **Andrew** Stomach pain >
- 08/15/24 - **Kellyn** Appointment Request >
- 08/15/24 - **Jose** Flu shot reaction? >
- 08/15/24 - **Dana** Should I be worried about posture and superglue? >
- 08/15/24 - **Andrew** Appointment Request >
- 08/15/24 - **Jose** 8/15 Voicemail >

Kellyn Wilson

Sex: Female
Birthdate: 12/04/15
Last Physical: 12/17/23

This message service is intended for non-critical questions only! If you require assistance immediately, please call the office. If you have a medical emergency, call 911.

Subject: Appointment Request

Reply

Message History

Subject: Appointment Request

Thu 08/15/24 12:59pm

Zelda Zen, LNA

I see we have an appointment on the schedule for Jose on Tuesday the 20th. We can see her at the same time, if that works for you.

While typing a reply, the previous message is available below

What's New

Add Additional Pre-Check-In Users

- New component called "Pre-Check-In Recipient"
- More than one user can complete Pre-check-In

From March 1, 2025 – June 30, 2025

Practices using Pre-Check-In (PCI) = **154**

PCI triggered = **522,442**

PCI submitted = **264,436**

PCI completed by practices = **245,119**

| Billing Account's Portal User | | Unlink | Manage |
|-------------------------------|--------------------------------|------------------------|------------------|
| Name: | Angela Wilson (Guardian) | Last Login: | 11/19/24 12:59pm |
| Sign In: | angwilson@example.com | Identity Verification: | Verified |
| Portal Notifications: | angwilson@example.com | Unread Messages: | 0 |
| Balances: | Angela Wilson (Account # 1421) | Unviewed Documents: | 0 |

Pre-Check-In Recipient
Billing Account: Angela Wilson (Guardian)
Additional Recipient:

none

none

Daniel Wilson (Guardian) daniel@example.com

ss, phone numbers, and email.



What's New

Portal Scheduling

- 2 Categories available (Sick/Well)
- Portal users select:
 - Appointment Reason
 - Provider
 - Location (if applicable)
- Schedule appointment
- Add appointment note (optional)



From March 1, 2025 – June 30, 2025

Practices using portal scheduling = 53

Appointments scheduled via the portal = 22,408

My Kid's Chart
Appointment Scheduling

✔ Kellyn's Appointment is Scheduled

Mon 04/14/25 1:00pm Kellyn

Appointment Note (Optional)

Briefly share any symptoms of illness or issues to discuss at this visit.

0 of 100 characters

Add Note

Exit

[Back](#)
My Kid's Chart
Appointment Scheduling

Patient: Kellyn Wilson
Appointment Category: Well

Select Appointment Criteria:

Appointment Reason
12yr - 13yr Well Visit

Appointment Provider
Leonard McCoy, MD

Appointment Location
Winooski - 20 Main St, Ste 7

Find Appointments

Exit

What's New

Preview Documents In pocketPCC

- Quickly review documents and images
- No need to download the file.
- Thumbnail preview
- Document's details



☰

pocketPCC

Visit - 11/09/24

👤

Documents

Date: 11/09/24
Pages: 2

Category: Patient Education
Attached To: 11/09/24 - Sick - Bright Futures
Last Modified: pcc 12/12/24 12:50pm

1. Determine the standing desk height by relaxing your shoulders and bending your elbows to 90 degrees

2. Adjust the desk height to just below the forearms

3. To minimize leg fatigue, alternate or shift weight from leg to leg occasionally

4. Frequently adjust your posture throughout the working day

What's New

Shoutout to Newly Onboarded Clients!



July–December 2024

- **Nurture Pediatrics, PLLC**
- **CEDAR Health**
- **Westside Pediatric Clinic**
- **Alabama Game Changers**
- **Bethesda Pediatrics**
- **Hamilton Mill Pediatrics**
- **Kidology Pediatrics**
- **Elemental Pediatrics**
- **Walnut Creek Pediatric Medical Group**
- **Treasured Pediatric Care**

January–July 2025

- **Brigman / Whittaker**
- **KidCare**
- **Parkway Pediatrics**
- **Bloom Pediatrics - Detroit**
- **Christakis Pediatrics (EHR Only)**
- **Children's Oasis Pediatrics**
- **Franklin Pediatrics, P.C.**
- **South Pasadena Pediatrics**

What's Next

PCC EHR

- Hide inactive patients
- Ability to search by Care Center
- Better visibility to Snap Texts while charting



Patient Finder

bas Find

Results for Name: bas

Care Center: Lakeside Pediatrics

☒ Include Inactive patients

| Last | First | DOB/Sex |
|------|-------|------------|
| | | 04/07/97 M |

Medical History *Unsaved Changes

| | |
|-----------|--|
| #cpadhd | ADHD Patient Care Plan... |
| #cpanemia | Microcytic Anemia Patient Care Plan... |
| #cpasthma | Asthma Patient Care Plan... |
| #cpautism | Autism Patient Care Plan... |
| #cpbh | Behavioral/Mood Disorder... |
| #cpconc | Minor Head Injury/Concussion... |
| #cpcovid | COVID + Care Plan... |
| #cpdep | Anxiety/Depression Patient Care Plan... |
| #cpdm | Diabetes Patient Care Plan... |
| .adhd | Attention Deficit Hyperactivity Disorder |

Family History no saved notes



What's Next

pocketPCC

- Filter the patient search
- Add Encounter Details to appropriate encounters
- Phone Note displays "Signature Requested"



pocketPCC
Find Patient

Active Patients

Find patient:

Bas

Search Results

Jordyn Bashore
04/18/24, 1y, F
PCP: None
Flags:

Elizabeth "Paige" Christopher Bassett P.A.
10/04/23, 1y 7m, F
PCP: None
Flags:

Basem Abernethy
11/05/08, 16y 6m, M
PCP: None
Flags:

pocketPCC
Phone Note - 09/05/24

Shaquana Padrone
16y 9m 11/21/07 Female

Phone Note - 09/05/24

Encounter Details

Date of Service: 09/05/24
Provider of Service: Beverly Crushes, MD
Signature Requested
Encounter Location: Winooski Pediatrics

Recent and Upcoming Appointments

UNDER CONSTRUCTION

What's Next

Portal Scheduling

- Prevent ONLY portal scheduling
- Schedule multiple patients
- Narrow search results
- Schedule by care center
- Additional category for portal scheduling
- Customize search rules for each category

Category: Other

☐ Display for Portal Scheduling

No Visit Reasons

No Providers

No Locations

Appointment Search

Appointment Book

☒ Always display location banners

☒ Display "All Locations" scheduling option

☐ Present Patient Details when scheduling appointments

Prevent scheduling for patients with any of these flags

Account Flags

Collection Prevent All Scheduling

Patient Flags

Dismissed Prevent All Scheduling

Needs Extra Time



My Kid's Chart

Appointment Scheduling

Service is intended for non-critical appointments only! If you require assistance immediately, please call the office. If you have a medical emergency, call 911.

Choose a patient

Choose a patient

When patient's Care Center does not offer Portal Scheduling, show patient disabled with "(Please call to schedule)" notation.

Christopher "Chris" Benjamin Clark, Jr (Please Call to Schedule)

Jonathan Clark

Portal Scheduling: Sick - Locations

Select the Locations that Portal Schedulers should see when scheduling "Sick" appointments

Search Filter:

| Include | Locations | Care Center |
|--------------------------|---------------------------------|---------------------------|
| <input type="checkbox"/> | Burlington Peds - Flu Clinic | Burlington Pediatrics |
| <input type="checkbox"/> | Burlington Peds - New North End | Burlington Pediatrics |
| <input type="checkbox"/> | Burlington Peds - Old North End | Burlington Pediatrics |
| <input type="checkbox"/> | Lake Champlain Pediatrics | Lake Champlain Pediatrics |
| <input type="checkbox"/> | St Albans Flu Clinic | Lake Champlain Pediatrics |
| <input type="checkbox"/> | Minneapolis Pediatrics | Minneapolis Pediatrics |

Appointment Search

Start: Offer appointments beginning on the patient's Next Physical Due date.

When the patient's next physical due is unknown or in the past (overdue):

Offer appointments beginning from now.

End: ☐ Offer up to of appointments.

☒ Offer appointments through the last day of assigned scheduling templates.

What's Next

Shoutout to Clients Currently In Progress!

- **Bayside Pediatrics**
- **Mid City Pediatrics**
- **Lincoln Pediatric Group**
- **Madison Pediatric Wellness Center**
- **Kaleidoscope Kids**
- **Children's Clinic Of Lufkin**
- **Northern Nevada Pediatrics**
- **Bright Starts Pediatrics**



Related UC Courses

Getting Started with Portal Self-Scheduling

Erica Greenwood
Wednesday at 2:30pm
Emerald III

Building a Solid Foundation: The Power of Patient Pre-Check-In

Jolie Lavigne
Thursday at 2:30pm
Emerald II

Front Desk Best Practices

Nick Meunier
Friday at 10:15am
Emerald III

How to Engage Patients Like it's 2025

Jim Leahy
Thursday at 10:30am
Emerald III

What's New

Reporting Improvements

- Row highlights
- Search results
- Collapsible rows
- Concise criteria summary
- Sorting control
- Better speed and reliability
- Dashboard infrastructure



Appointments

Data source for building appointment-focused reports.

Appointments / Blocks: Appointments Only
Appointment Date: From 11/18/2024 to 12/02/2024
Appointment: From 8:00am to 5:00pm
Appointment Location: Winooski Pediatrics

Columns: 5 Displayed Group By: Appointment Date Search Filter:

| Appointment Date | Appointment Time | Appointment Provider | Appointment Reason | Patient Name |
|-------------------------|------------------|----------------------|------------------------|-----------------------------------|
| 11/29/2024 (1 result) | | | | |
| 11/29/2024 | 1:15pm | Beverly Crusher, MD | Sick Call | Alvarez J.R., John "Matthew" John |
| 11/30/2024 (8 results) | | | | |
| 12/01/2024 (5 results) | | | | |
| 12/02/2024 (23 results) | | | | |
| 12/02/2024 | 10:00am | Fred Jones, M.D. | 10yr - 11yr Well Visit | Quarry, Hope |
| 12/02/2024 | 9:05am | Beverly Crusher, MD | Sick Call | Quarry, Andrew |
| 12/02/2024 | 3:00pm | Beverly Crusher, MD | Sick Call | Padrone, Shaquana |
| 12/02/2024 | 10:00am | Beverly Crusher, MD | Sick Call | Baker Jr, Zachary "Zach" Troy |
| 12/02/2024 | 9:00am | Beverly Crusher, MD | Sick Call | Greenawalt, Hannah "TC" Hope |

39 Results

Report Library Back Schedule Export Close Print

Only criteria that filter report output display in the criteria summary

What's New

Financial Oversight in the Report Library

- New category
- Reconcile insurance payments
- Adjustment trends
- Contract fee schedule deviations
- Provider productivity



Total Charges and Payments by Provider and Month

Aggregate charges and payments by provider for provider productivity assessments.

Transaction Date: All Dates

Include by Procedure: All

Exclude by Procedure: None

Location: All

Provider: All

Columns: All 5 Displayed

Group By: Transaction Month

Search Filter:

| Provider | Transaction Month | Total Charges | Total Payments | Refund Amount |
|--------------------------|-------------------|---------------|----------------|---------------|
| Beverly Crusher, MD | 2024-07 | \$150.00 | \$40.00 | (\$0.00) |
| Elizabeth Mary Casey, MD | 2024-07 | \$10,388.30 | \$6,150.07 | (\$0.00) |
| James Davidson, Jr. M.D. | 2024-07 | \$9,272.00 | \$6,663.62 | (\$0.00) |
| Kathleen W. Gomez, M.D. | 2024-07 | \$10,112.00 | \$7,216.47 | (\$0.00) |
| Mark Williams, M.D. | 2024-07 | \$28,297.32 | \$18,396.23 | (\$0.00) |

Related UC Courses

Financial Oversight Reporting

Tim P.
Thursday at 10:30
Diamond I

Reporting Walk-In Clinic

Tim P. and Friends
Thursday **AND** Friday
at 1:15
Diamond II

Clinical Oversight Reporting

Tim P.
Friday at 10:15
Diamond I

What's New

Combine Duplicate Patients and Accounts

- Compare demographic information
- Choose which entry to keep or append
- Review color-coded summary before combining

Combine Patients - Select Patient to Keep Mark Wilson Account #336 RD 7 Box 006

Choose the patient record to keep. The other patient's record (and data shown below) will be discarded when the records are combined.

| DISCARD | KEEP |
|--|--|
| Patient Demographics Dana Wilson (PCC# 2134) Date of Birth: 08/22/15 Sex: Female Birth History GA at Birth: Undetermined Multiple Birth: Undetermined Race, Ethnicity, and Preferred Language Race: Ethnicity: Pref. Language: Patient Information PCP: None Other ID: School: Note: Created: 06/21/07, Last Visit: 07/03/24 | Patient Demographics Dana Wilson (PCC# 4053) Date of Birth: 08/22/15 Sex: Female Birth History GA at Birth: Undetermined Multiple Birth: No Race, Ethnicity, and Preferred Language Race: White Ethnicity: Not Hispanic or Latino Pref. Language: English Patient Information PCP: Other ID: School: Note: Created: 08/05/24, Last Visit: 07/15/24 |

Click to change which patient demographics is kept, and which is discarded

Each scroll bar scrolls both patient demographics

Back Cancel Next Step

Combine Patients - Review Data to Combine Mark Wilson Account #336 RD 7 Box 006

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

| ✓ KEEP | + APPEND | = COMBINED |
|---|--|--|
| Dana Wilson (PCC# 4053) Patient Flags: Medicaid, Winooski Pediatrics Clinical Data Appointments: 1 Encounters: 1 Documents: 0 Immunizations: 1 | Dana Wilson (PCC# 2134) Patient Flags: Clinical Data Appointments: 10 Encounters: 10 Documents: 1 Immunizations: 15 | Dana Wilson (PCC# 4053) Patient Flags: Medicaid, Winooski Pediatrics Clinical Data Appointments: 11 Encounters: 11 Documents: 1 Immunizations: 16 |

Back Cancel Combine



What's New

Compare Historical Results by Lab Order

| Diagnosis | Lab Tests | Lab Orders | Medical Test | Radiology | Screening | Vitals |
|--|-----------------------|---|--|-----------|-----------|--------|
| Lab Orders | | Display: CBC With Differential/Platelet [LabCorp] | | | | |
| CBC With Differential/Platelet [LabCorp] | 11/13/24 (10y) | 10/25/23 (9y) | 02/21/23 (8y 3m) | | | |
| | Completed CBC | Final CBC With Differential/Platelet [LabCorp] | Final CBC (INCLUDES DIFF/PLT) [Quest] | | | |
| WBC | 1 10 ³ /uL | 4.0 x10E3/uL | 4.85 Million/uL | | | |
| RBC | 1 10 ⁶ /uL | 2.54 x10E6/uL | 4.85 Million/uL | | | |
| Hemoglobin | 1 g/dL | 20.1 g/dL | 16.2 g/dL | | | |
| Hematocrit | 1 % | 65.4 % | 32.8 % | | | |
| MCH | 1 pg | 30.0 pg | 33.0 pg | | | |
| MCHC | 1 g/dL | 30.1 g/dL | 32.0 g/dL | | | |
| RDW | 1 % | 17.7 % | 11.5 % | | | |
| Platelets | | 29 x10E3/uL | 280 Thousand/uL | | | |
| Neutrophils | | 82 % | | | | |
| Lymphs | | 14 % | Test Not Performed | | | |
| Monocytes | 1 % | 4 % | | | | |
| Eos | | 0 % | | | | |
| Basos | | 0 % | | | | |
| Neutrophils (Absolute) | | 13.4 x10E3/uL | | | | |
| Lymphs (Absolute) | | 2.3 x10E3/uL | | | | |
| Monocytes(Absolute) | 1 10 ³ /uL | 0.7 x10E3/uL | | | | |
| Eos (Absolute) | | 0.0 x10E3/uL | | | | |
| Baso (Absolute) | | 0.0 x10E3/uL | | | | |
| Immature Granulocytes | | 0 % | | | | |
| Immature Grans (Abs) | | 0.0 x10E3/uL | | | | |



What's New

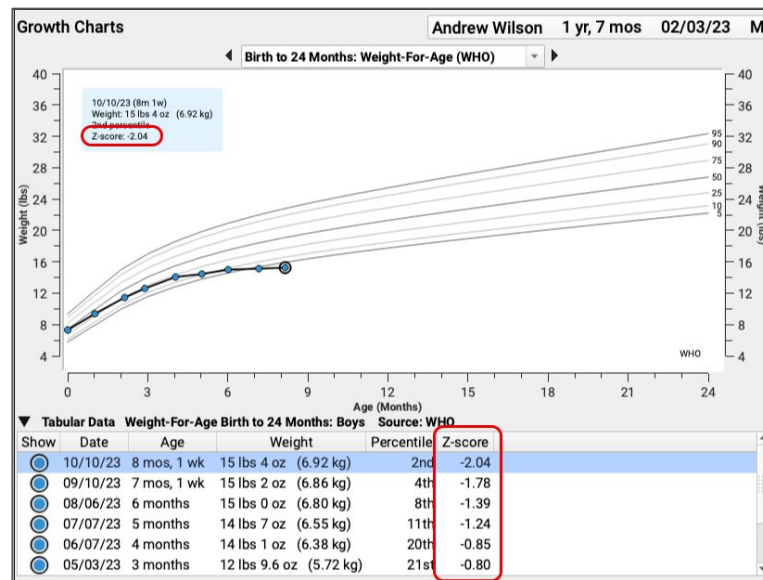
Vitals and Screenings

- Review z-scores in growth charts
- In-chart blood pressure percentiles
- Report on weight last visit

Blood Pressure s / d 57th / 75th percentile_(AAP)

Left Arm

Sitting



Customize Report

Title: Patient List

Description: Build lists of patients

Date Added to PCC EHR

All Dates

Include by Patient Flag

Edit All Patient Flags

Columns

Select All Select None

Search Filter:

| Select | Columns |
|-------------------------------------|-------------------------|
| <input type="checkbox"/> | Next Appointment Reason |
| <input type="checkbox"/> | Patient Suffix |
| <input checked="" type="checkbox"/> | Last Recorded Weight |

Cancel Save

Related UC Courses

Mastering Forms Workshop

Dan G. and Tim P.
Thursday at 2:30
Diamond I

Practice On The Go - a Review of pocketPCC

Jim L.
Friday at 1:15
Diamond I

Are You Charting Like It's 2025?

Lynne G. and Dr. Lavania
Wednesday at 1:15
Emerald II

Are You Using CHADIS Like It's 2025?

Sasha P.
Wednesday at 1:15
Diamond I

What's Next

Personal Balance Follow-up Tool



Personal Balance Follow-up

Personal Balance Follow-up

Personal Balance: \$5 minimum total balance

Last Reviewed: Balance reviewed more than 7 days ago

Last Personal Payment: More than 30 days ago

Last Bill: More than 30 days ago

Search Filter:

| Account Name ▼ | Current | 30-59 Days | 60-89 Days | 90-119 days | 120+ days | Total Personal Balance | Last Personal Payment | Last Bill | Last Reviewed |
|-------------------|----------|------------|------------|-------------|-----------|---------------------------|--------------------------|------------|-------------------------|
| Doe, John | \$125.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$125.00 | 01/15/2024 | 02/24/2025 | 03/06/2025 Dan Gillette |
| Flanagan, Darlene | \$32.00 | \$54.26 | \$0.42 | \$0.00 | \$368.52 | \$455.20 | 11/09/2024 | 01/15/2025 | 02/01/2025 Joe Schmoe |
| Pogarth, Jane | \$110.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$110.00 | | | |
| Flintstone, Fred | \$0.00 | \$0.00 | \$0.00 | \$5.00 | \$0.00 | \$5.00 | 08/13/2023 | 01/15/2025 | 02/01/2025 Joe Schmoe |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

4 Results

Back

Mark as Reviewed

Close

Open Account



What's Next

Account Forms

- Account component
- Account forms configuration
- Document history
- Import documents

Account Forms Configuration - Edit Form

Form Name: Active ☐ Inactive ☒

B I U A

Practice Address - C

Account Address - City Account Address - St

Account Address - Zip

Billing Account Address - Line 1

Account Address - Line 2

Patient Forms Account Forms Letterhead Signatures

Account Forms Configuration

Name Last Saved

Import Documents

Find: ☐ Patient ☒ Account

Find

First Last Service Address

Patient Forms

Generate Medical Records

Generate School Nurse Meds Admin

select a form

Account Forms

Select a form

60 Day Letter

Documents

Patient Account: Sally Jones (Home) Account: James Dang (Billing)

UNDER CONSTRUCTION

What's Next



Standardized Clinical Measure Reporting for NCQA PCMH Recognition

- Depression Screening and Follow Up
- Childhood Immunization Status
- Weight Assessment and Counseling for Nutrition and Exercise
- Documentation of Current Medications in the Medical Record



...in the Report Library!

What's New - PCC Support Stats

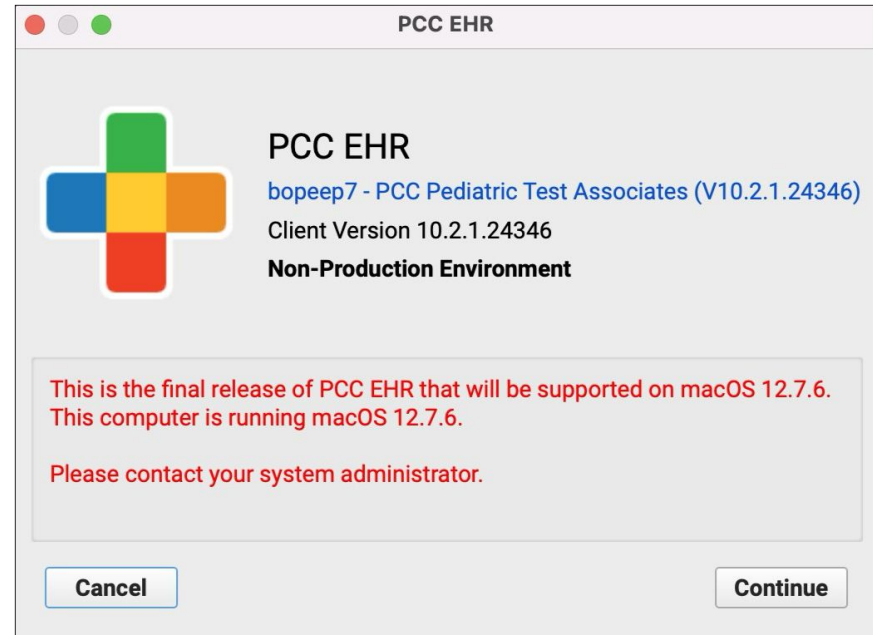
- Support tickets resolved: **19,316**
- Proactive Client Calls: **1,441**
- In-Person GoLives: **15**
- Billing Follow-up Visits: **12**
- Follow Up (Wellness) Visits: **25**
- Hardware Tech Visits: **5**



What's New - Infrastructure & Security Upgrades

Why infrastructure releases are good for you:

- Performance
- Security
- Reliability
- Supportability



What's Next - Infrastructure & Security Upgrades

Windows 10 end of support:

- Performance
- Security
- Reliability
- Supportability



What's New - Technical Services

- Rocky 8 operating system migration complete
- Direct shipment of physical servers
- Lessened post upgrade server and printer fallout
- Q1 and 2 Proxmox Virtualized Environment (PVE) upgrades & maintenance
- Network-Attached Storage (NAS) backups brought into centralized management



What's Next - Technical Services

- Less scheduled downtime
- Reduced nightly backup durations with new data storage options
- Managing client networking environments from a single pane of glass
- New internet failover if you have a secondary internet connection



What's (not really) New - Consulting

- Compensation models
- Financial analysis
- Succession planning
- Strategic planning
- Culture development



What's Next - Practice Owners

Practice owner drop-in discussions!

- **January:** four inaugural events, hosted by practice size
- **May:** focus on compensation models (but we covered a lot more!)
 - Coming in September: focus on data needs

Join our Practice Owner's Mailing list!

- Hear about upcoming drop-ins!
- Share ideas to support practice owner independence
- Make sure we can connect with you!



Scan this code!



Related UC Courses

Practice Roundtables By Size

Wednesday, 3:45 - 4:45 pm
See Agenda for room details

Practice Roundtables By Region

Thursday, 3:45 - 4:45 pm
See Agenda for room details

Employee Engagement & Retention

Megan M & Emily S
Friday, 1:15 - 2:15 pm
Amphitheater

Related UC Courses

When and How to Add a New Practice Location

Chip H. and Kathy C.
Friday at 10:15
Amphitheater

Practice Values Workshop

Chip H. and Dr. Birch
Thursday at 1:15
Emerald III

PCC EHR Customizations & Workflow for Pediatric Medical Homes

Kate T. and Amanda Ross
Thursday at 10:30
Emerald II

Related UC Courses

Are You Running Your Practice Like It's 2025?

Chip H.
Wednesday at 1:15
Emerald III

Ask PCC: Hot Ones

Chip H., Scott K., Jim L. & More
Friday at 3:30
Emerald III

Ask Chip

Chip H.
Friday at 3:00
Emerald III

Maintaining and Improving Your HIPAA Compliance Plan Workshop

Megan M
Thursday, 1:15 - 2:15 pm
Amphitheater



Kelsey Taveras
Business Analyst

What's New?

Process Electronic Remittance Advice

Transaction Date

Select the transaction date:

☒ 01/17/25 (Remittance Date)

☐ 07/09/25

Cancel

Next

Electronic Remittance Advice - View

Human Readable

X12

Find:

Status: Processed 07/09/25 by PCC PCC

ERA

Remittance: 11/29/23

Payor FRIENDLY CHILDS HEALTH PLAN, INC

Check #: 0999999999

Amount: 123.65

Autopost Processing Summary:

Payment: 0.00 0 claims

Adjustment: 0.00

Exceptions: 123.65 2 claims

Check Amount: 123.65 2 claims

Payor Processing Status:

Primary: 1

Reversal: 1

Total: 2

Posting Exceptions:

Did not find a payment to reverse 2

Procedure code not found in the charge history for this claim 4

Total: 6

Special Cases:

none

Display: All Payments

Posting Exceptions: All Posting Exceptions

Payor Processing Status:

Special Cases:

Adjustment Reasons Selector

Print

Back

UC2025

BUILDING SOMETHING AWESOME!

PCC

Pediatric EHR Solution

Billing History

Hannah Taglang 16 years 07/18/08 F

04/25/22 Mark Williams, M.D., Burlington Peds - New North End

| | | |
|---------|--|----------|
| Totals: | Charges: | 300.00 |
| | Master Card Payment: | (20.00) |
| | Ins Pmt: | (132.38) |
| | Ins Adj - Cigna Open Access 20 182223: | (147.62) |
| | Balance: | 0.00 |

Claim Information:

Billing Provider: Beverly Crusher, MD

Payments from 04/25/22:

| Amount | Type |
|--------|---|
| 20.00 | Master Card Payment |
| 20.00 | applied to 04/25/22 Han Taglang 99214 OV Detailed H&E Beverly Crusher, MD |

Claim History:

| Date | Event | Insurance (PayorID) | Details | Claim ID | User |
|------------------|---|---------------------|------------------------------|-----------|------|
| 04/25/22 05:10pm | Claim Queued | Cigna PPO (62308) | Charges posted (PM) | | |
| 04/26/22 01:44pm | Claim Queued | Cigna PPO (62308) | Queued by PCC Support | | |
| 04/26/22 01:44pm | Claim Submitted | Cigna PPO (62308) | (PM) | 101010101 | |
| 04/26/22 06:20pm | Claim Acknowledged by PCC | Cigna PPO (62308) | | 101010101 | |
| 04/27/22 07:20am | Claim Acknowledged by Payor | Cigna PPO (62308) | | 101010101 | |
| 05/02/22 08:56am | Claim Adjudication Posted Manually | Cigna PPO (62308) | Check # 220428070002691 (PM) | 101010101 | |

Billing History Index

Find Filter:

Find



| Date | Provider of Service | Place of Service | Billing Status | Signed | Billing Account |
|----------|-----------------------|-------------------------------------|----------------|---------|-------------------------|
| 04/25/22 | Mark Williams, MD | Burlington Peds - New North End | Posted | Crusher | Tito Taglangy (# 46301) |
| 04/05/22 | Beverly Crusher, MD | Burlington Peds - New North End | Posted | Crusher | Tito Taglangy (# 46301) |
| 10/30/21 | Beverly Crusher, MD | Burlington Peds - New North End | Posted | Crusher | Tito Taglangy (# 46301) |
| 09/14/21 | Mark Williams, MD | Burlington Peds - New North End | Posted | Crusher | Tito Taglangy (# 46301) |
| 08/03/21 | Mark Williams, MD | Burlington Peds - New North End | Posted | Crusher | Tito Taglangy (# 46301) |
| 08/01/20 | Jill S. Steller, M.D. | Chestnut Ridge Pediatric Associates | Posted | Steller | |

Print

Payments

Create Encounter

Post Charges

View Documents

Close

Save

Save + Exit

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Electronic Bills

Bills Last Submitted: 07/17/24

Select electronic bills to be prepared:

Select All

- ☒ Current
- ☒ Overdue 30 days
- ☒ Overdue 60 days
- ☒ Overdue 90 days
- ☒ Overdue 120 days

Close

Prepare E-bills

Abigail Addington PCC# 2503

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

Billing History

PCC eRx

Create Visit

Billing History

Abigail Addington 9 yrs, 11 mos 12/21/14 F

01/30/24 Beverly Crusher, MD, Winooski Pediatrics

Date of Service: 01/30/24
Provider of Service: Beverly Crusher, MD
Encounter Location: Winooski Pediatrics
Place of Service: Winooski Pediatrics

Account:

Jeffrey Addington (Account #1238)
730 Grandview Drive
Saint Albans Bay, VT 05481

Primary Insurance Policy:

Aetna PPO \$10
Certificate: 1111111
Group: 1111

Secondary Insurance Policy:

Capital Blue Cross \$10 OV&WC-Other
Certificate: YWP57782605403
Group: Add128

Diagnoses:

J20.2 Acute bronchitis due to streptococcus

Procedures:

| CPT | Units | Description | Amount | Diagnoses |
|-------|-------|-----------------|--------|-----------|
| 99214 | 1 | OV Detailed H&E | 87.00 | J20.2 |

Billing History Index

Find Filter:

Find



| Date | Provider of Service | Place of Service | Billing Status | Signed | Billing Account | Docs |
|----------|---------------------|---------------------------------|----------------|--------|----------------------------|------|
| 01/30/24 | Beverly Crusher, MD | Winooski Pediatrics | Posted | n/a | Jeffrey Addington (# 1238) | |
| 01/18/24 | Mark Williams, M.D. | Burlington Peds - New North End | Not Ready | | Jeffrey Addington (# 1238) | |
| 01/17/24 | Mark Williams, M.D. | Winooski Pediatrics | Posted | n/a | Jeffrey Addington (# 1238) | |
| 01/10/24 | Mark Williams, M.D. | Rural Hospital IH | Posted | n/a | Jeffrey Addington (# 1238) | |

Print

Payments

Create Encounter

Edit Charges

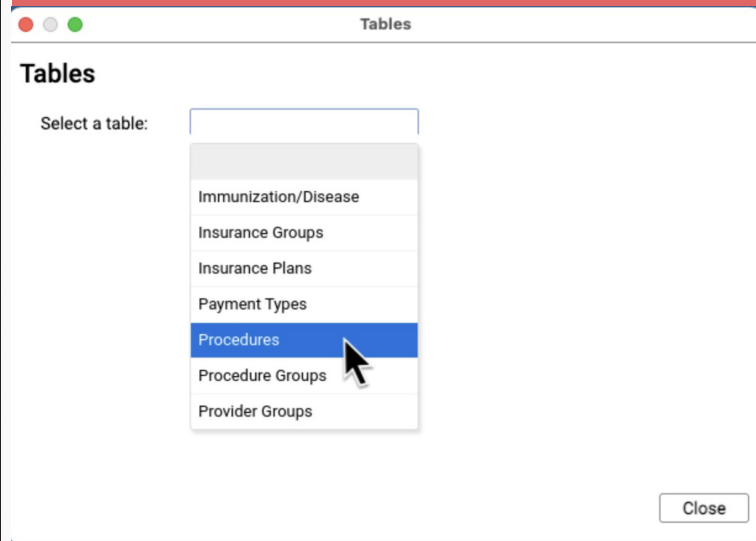
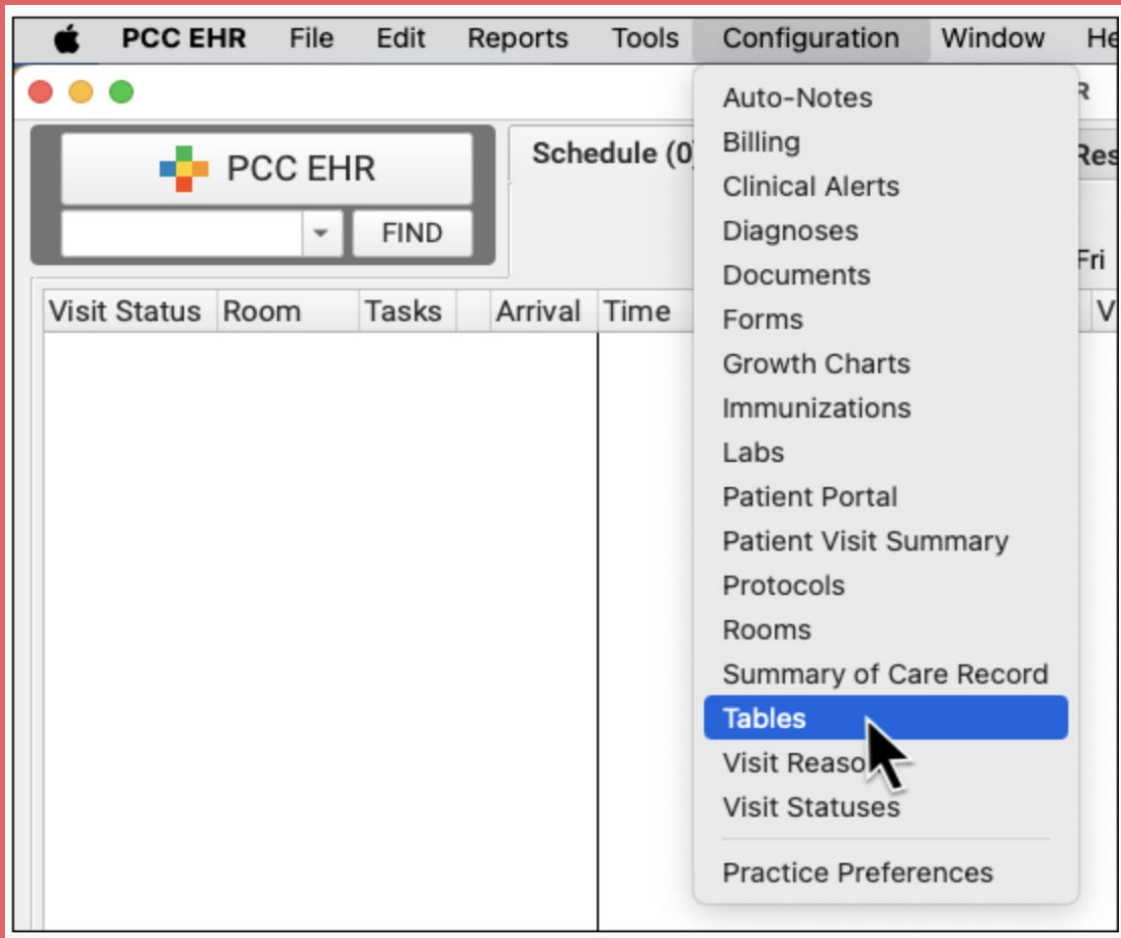
Post Charges

View Documents

Close

Save

Save + Exit

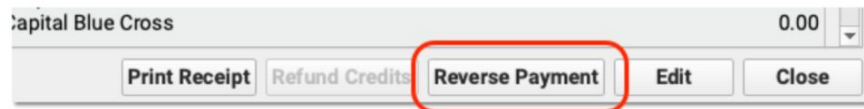


Use the Enter Key as You Manually Enter Insurance Payments

When you need to manually enter an insurance payment from an EOB, the numeric keypad on an extended keyboard makes the process easier. In PCC 10.2, you can press **Enter** in the Insurance Payments tool to advance to the next field.

Track Payment Reversals and Refunds Back to the Original Provider

When an ERA includes a takeback, or you post a payment reversal or refund manually, PCC EHR will now associate the accounting adjustment with the original provider of the payment.



A screenshot of a software interface for Capital Blue Cross. The interface shows a header with the company name and a value of 0.00. Below the header is a row of buttons: 'Print Receipt', 'Refund Credits', 'Reverse Payment', 'Edit', and 'Close'. The 'Reverse Payment' button is highlighted with a red rectangular box.

Prior to PCC 10.2, posting a refund, write-off, or takeback would create an adjustment procedure associated with provider “None” when the full payment amount was adjusted off. While this was accurate (these payments were no longer associated with charges or a provider), some pediatric practices wish to ensure that all accounting activity is associated with a specific provider. As of PCC 10.2, the original provider of the originally linked charge will be used for the adjustment. Reports that show detailed transaction logs for providers will now associate refunded or reversed payments and the associated adjustment with the original provider.



What's Next?

Account History

Roshan Mansberger 11 yrs, 3 mos 03/12/14 M

Account History

Marlin Mansberger (Account # 1578)

Date: mm/dd/yy to mm/dd/yy

Patient: All Patients

Find:

Display: ☒ Diagnoses ☒ CARC ☒ Statements

06/09/25

Roshan Mansberger (PCC# 1702)

Service Provider: Mark Williams, M.D.

Responsible Party: Aetna

Billing Provider: Mark Williams, M.D.

Place of Service: Winooski Pediatrics

| Date | Description | Charge | Payment | Adjustment | Insurance Due | Medicaid Due | Personal Due | Total Due |
|----------|--|--------|---------|------------|---------------|--------------|--------------|-----------|
| 06/09/25 | 99213 OV Expanded Focus | 56.00 | | | 41.00 | | 10.00 | 51.00 |
| | M13.0 Polyarthritis, unspecified | | | | | | | |
| 06/09/25 | Visa Card Payment from una... | | 5.00 | | | | | |
| 06/09/25 | Additional Diagnoses | | | | | | | |
| | Z09 Encounter for follow-up examination after completed treatment for conditions other than malignant neoplasm | | | | | | | |
| Totals: | | 56.00 | 5.00 | | 41.00 | | 10.00 | 51.00 |

06/09/25 Unapplied Payment

| Date | Description | Payment | Adjustment |
|----------|-------------------|---------|------------|
| 06/09/25 | Visa Card Payment | 30.00 | |
| | ► Unapplied 20.00 | | |
| Totals: | | 30.00 | |

04/28/25

Roshan Mansberger (PCC# 1702)

Service Provider: Mark Williams, M.D.

Responsible Party: Personal

Billing Provider: Mark Williams, M.D.

Place of Service: Winooski Pediatrics

| Date | Description | Charge | Payment | Adjustment | Insurance Due | Medicaid Due | Personal Due | Total Due |
|----------|-------------------------|--------|---------|------------|---------------|--------------|--------------|-----------|
| 04/28/25 | 99213 OV Expanded Focus | 56.00 | | | 0.00 | | 0.00 | 0.00 |

Print

Close

Save

Save + Exit

Insurance Balances

Claim Rejections

Claim rejections are claims that were submitted, then rejected by a clearinghouse or payor. They need to be corrected and resubmitted so they can be accepted by the payor for adjudication.

| Insurance Group | Claim Rejections | Amount | |
|-------------------------|------------------|------------|--|
| Aetna Open | 2 | \$74.81 | |
| Aetna USHC HMO | 3 | \$75.22 | |
| BCBS | 1 | \$14.49 | |
| Geisenger Health Plan | 12 | \$721.44 | |
| Health America | 8 | \$284.95 | |
| Health Assurance | 3 | \$159.24 | |
| HealthyKids HMO | 32 | \$1.00 | |
| Retired Insurance Plans | 1 | \$67.07 | |
| Totals | 62 | \$1,397.22 | |

Rejection Dates: Last 90 Days From: 04/10/25 To: 07/09/25

Work With All

Close

Select

Insurance Balances

Claim Rejections — Geisinger Health Plan

Search Filter:

| Rejection Date | Insurance Plan | Patient | Service Date | Days Since Service Date | Amount | Claim ID | Source | Reason | Rejection Status | Assigned | Resolved By |
|----------------|--------------------|----------------------|--------------|-------------------------|---------|----------|---------------|---------------------------------|------------------|----------|-------------|
| 04/21/25 | Geisinger HMO \$10 | Snider, Megan | 05/25/24 | 410 | | 70416 | Payor | Accusantium facere et eve... | Unresolved | | |
| 06/27/25 | Geisinger HMO \$20 | Sheridan, Cassie N. | 08/27/24 | 316 | | 99935 | Payor | Adipisci consequatur ullam... | Unresolved | | |
| 05/14/25 | Geisinger HMO \$10 | Wilcox, Brandon | 08/20/24 | 323 | | 12224 | Payor | Aliquam omnis quo aut lab... | Unresolved | | |
| 06/25/25 | Geisinger HMO \$20 | Sheridan, Cassie N. | 11/02/24 | 249 | | 29857 | Payor | Aliquid perferendis et tota... | Unresolved | | |
| 05/14/25 | Geisinger HMO \$5 | Kunisky, Jill C | 02/12/24 | 513 | \$90.91 | 84829 | Payor | Animi veritatis ut delectus ... | Unresolved | | |
| 06/15/25 | Geisinger HMO \$20 | Schmidt, Baby Boy | 11/24/23 | 593 | \$35.13 | 28116 | Payor | At mollitia dolor qui non id | Unresolved | | |
| 06/28/25 | Geisinger HMO \$5 | Kunisky, Jill C | 04/30/24 | 435 | \$84.43 | 2450 | Payor | Atque eaque vero aut digni... | Unresolved | | |
| 05/05/25 | Geisinger HMO \$15 | Bell, Danielle M. | 03/30/24 | 466 | \$55.83 | 49005 | Payor | Aut laboriosam magnam in... | Unresolved | | |
| 06/02/25 | Geisinger HMO \$15 | Kugle, Cayla | 06/26/22 | 1,109 | | 22377 | Clearinghouse | Aut sit quas nesciunt est m... | Unresolved | | |
| 05/06/25 | Geisinger HMO \$5 | Kunisky, Jill C | 09/22/24 | 290 | | 84635 | Payor | Autem doloremque animi q... | Unresolved | | |
| 04/26/25 | Geisinger HMO \$15 | Fuschetti, Brando... | 02/19/24 | 506 | | 53119 | Payor | Autem nam id voluptate es... | Unresolved | | |
| 06/26/25 | Geisinger HMO \$20 | Sheridan, Cassie N. | 09/30/24 | 282 | | 9254 | Payor | Commodi magni omnis as... | Unresolved | | |

85 Claim Rejections

Rejection Dates: From: To:

Rejection Status:

Assigned User:

Mark as Resolved

Mark as Unresolved

Back

View Details

Insurance Balances

Claim Rejection — View Details

Rejection Details

Rejection Date: 06/15/25
Claim ID: 28116
Insurance: Geisinger HMO \$20
Amount: \$35.13

Encounter Details

Patient: Baby Boy Schmidt (PCC# 2733)
Service Date: 11/24/23 (593 Days Elapsed)
Insurance Due: \$0.00

Claim Rejection Change History

06/02/23 12:00:00am Unresolved
06/15/25 03:38:02pm Rejection received from Payor

Rejection Reason: At mollitia dolor qui non id

Find: 2733 28116 1 of 1

188733 2733 28116 ENQH NYRKNAQRE 20250325 725.00 22099
OVYYVAT CEBIVQRE GNK VQ: 450634823
CNLRE PYNVZ PBAGEBY AHZORE: QV25085545636
FHOFPEVORE VQ: AWK3UMA75549830
ZRFFNTRF: At mollitia dolor qui non id
pynvz/rapbhagre unf orra npprcgrq vagb gur nqwhqvpngvba flfgrz.
20 Npprcgrq sbe cebprffvat.

188733 2167339 2474 ENQH NYRKNAQRE 20250325 725.00 22099
OVYYVAT CEBIVQRE GNK VQ: 450634823
CNLRE PYNVZ PBAGEBY AHZORE: QV25085545497
FHOFPEVORE VQ: ZFS379J03887
ZRFFNTRF: N2 Npxabjyrqtrzrag/Npprcgnapr vagb nqwhqvpngvba flfgrz-Gur
pynvz/rapbhagre unf orra npprcgrq vagb gur nqwhqvpngvba flfgrz.

Assigned To:

Rejection Status: ☒ Unresolved ☐ Resolved

Billing History Edit Charges Cancel Save



Insurance Balances

| | |
|------------------|-------------------|
| Claim Rejections | Unpaid Encounters |
|------------------|-------------------|

Unpaid Encounters

Unpaid encounters include charges pending an insurance payor. Aging categories are by transaction date, and amounts shown are the total charge amount pending insurance.

| Insurance Group | Encounters | 0-29 days | 30-59 days | 60-89 days | 90-119 days | 120+ days | Amount | % |
|----------------------------|------------|-----------|------------|------------|-------------|-----------|--------|---|
| Aetna | 12 | 123.00 | 234.00 | 456.00 | 789.00 | 3,446.00 | 7% | |
| BCBS | 15 | 123.00 | 234.00 | 456.00 | 789.00 | 317.00 | 8% | |
| Capital Blue Cross | 42 | 0.00 | 400.00 | 200.00 | 200.00 | 800.00 | 1% | |
| Cigna | 2 | 0.00 | 0.00 | 0.00 | 2,393 | 2,393.00 | 2% | |
| Geisenger Health Plan | 1 | 100.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% | |
| Green Leaf Insurance | 9 | 0.00 | 0.00 | 0.00 | 0.00 | 1,480.00 | 12% | |
| Health America | 21 | 0.00 | 338.00 | 0.00 | 0.00 | 338.00 | 6% | |
| Health Assurance | 29 | 0.00 | 0.00 | 244.00 | 0.00 | 244.00 | 9% | |
| HealthPass | 1 | 0.00 | 0.00 | 0.00 | 0.00 | 89.00 | 2% | |
| HealthyKids HMO | 1 | 0.00 | 0.00 | 0.00 | 0.00 | 196.00 | 1% | |
| Highmark Blue Shield | 78 | 0.00 | 0.00 | 0.00 | 0.00 | 11,972.00 | 4% | |
| Keystone HealthPlan | 11 | 0.00 | 0.00 | 0.00 | 0.00 | 1,549.00 | 6% | |
| Medicaid | 1 | 0.00 | 0.00 | 0.00 | 0.00 | 220.00 | 1% | |
| Miscellaneous Insurance | 1 | 0.00 | 0.00 | 0.00 | 0.00 | 124.00 | 2% | |
| Private Insurance Policies | 13 | 0.00 | 0.00 | 0.00 | 0.00 | 1,796.00 | 7% | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Totals | 232 | 984.00 | 4,434.00 | 6,456.00 | 2,789.00 | 3,446.00 | | |

Close

Insurance Balances

| | |
|------------------|-------------------|
| Claim Rejections | Unpaid Encounters |
|------------------|-------------------|

Unpaid Encounters- Work With All

Search Filter:

[illegible]

12 Encounters

| | |
|--------|-------------|
| Aging: | All |
| | All |
| | 0-29 Days |
| | 30-59 Days |
| | 60-89 Days |
| | 90-119 Days |
| | 120+ Days |

| | |
|-------------------|-----------------------|
| Place of Service: | All Places of Service |
|-------------------|-----------------------|

| | |
|----------------------|---------------|
| Provider of Service: | All Providers |
|----------------------|---------------|

Back

[View Details](#)

Insurance Balances

Claim Rejections

Unpaid Encounters

Unpaid Encounters - View Details

Encounter Details

Patient: Pebbles Flintstone (pcc # 3336) DOB 01/01/07 (F)
Date of Service: 04/01/25 (32 Days Elapsed)
Insurance: Aetna PPO \$10
Provider of Service: Elizabeth Casey, MD
Billing Provider: Elizabeth Casey, MD
Place of Service: Winooski Pediatrics

Balance Information

Total Charges: 360.00
Insurance Due: 350.00 (Aetna PPO \$10)
Personal Due: 10.00

Billing History

Edit Charges

Back

Real Time Claim Status

What is real time claim status?

- Refers to the ability to electronically check the status of a submitted claim with a health insurance payer immediately
- Currently many billers use payer portals for this inquiry

Why is real time claim status important?

- Improved cash flow: Faster claim processing and payment
- Reduced administrative costs: Less time spent on phone calls and manual follow-up
- Enhanced patient satisfaction: Ability to provide accurate and timely information to families about their financial responsibility
- Better resource allocation: Focus staff resources on claims requiring intervention
- Improved compliance: Reduced risk of claim denials due to timely identification of errors
- Better reporting: We can report on discrete information that we currently can't report on

Related UC Courses of Interest

- **Wednesday**

- 1:15 pm **What's New with Billing in PCC EHR?** Presented by Brian Kennedy and Doug Brosseau
- 2:30 pm **Reporting for Billers (now also including PCC EHR)** Presented by Ben Brandt

- **Thursday**

- 10:30 am **Are You Billing Like It's 2025?** Presented by Doug Brosseau
- 11:15 am **Billing Drop In, Live from the UC!** Presented by the Getting Paid Team
- 2:30 pm **2025 Coding Updates** Presented by Brian Kennedy and Jan Blanchard

- **Friday**

- 10:15 am **Proper Pricing for your Services: A Building Block to increasing Revenue** Presented by Ben Brandt
- 1:15 pm **Distribute the Weight: How *Everyone* Can Affect Your Billing Processes** Presented by Jan Blanchard



Ambient Scribe

Ambient Scribe

Thoughtfully leveraging emerging technology to improve the charting experience for providers through AI-assisted note completion tools.



Ambient Scribe (What Is It?)

- It seems like many of you already know...
- **But here's an AI summary:** "A technology, often using artificial intelligence, that listens to clinical conversations and automatically generates clinical notes."
- **That sounds about right!** Generally speaking, encounter audio gets processed by a Large Language Model (LLM) to generate visit/chart note content, with varying levels of customizable structure.



Ambient Scribe (Why Do It?)



- Again, it seems like many of you already know...
- **Doctors aren't stenographers:** PCC Users are always telling us they want to spend less time typing and more time focused on their patients.
- **This is one solution:** Many PCC Users have adopted ambient scribe applications to help with their charting workflow already, and some report significant benefit.

Ambient Scribe (What's PCC Doing?)



- Researching core technologies and available solutions.
- Talking to our favorite people (**you**)!
- Interviewing vendors, learning about their offerings (and policies, and plans, and vibes...)
- Getting hands-on with the technologies.
- Considering how Ambient Scribe features could best work in PCC EHR.

Ambient Scribe (What's PCC NOT Doing?)



- Leaping before we've taken a good look
- Seeking to shoehorn AI tools where they don't belong
- AI Clinical Decision Support, AI RCM Management, AI Chatbot
- Forcing new tools on our users
- Thinking Ambient Scribe is a silver bullet for charting optimization

Ambient Scribe (Important Factors)

- Patient Safety / Privacy
- Provider Satisfaction, Real Utility
- Note Template Flexibility / Extensibility
- Accuracy and Explainability of Generated Content
- User Experience Within PCC EHR Ecosystem



Ambient Scribe (PCC's Goals)

- Identify the right solution (based on those factors)
- Deliver it to you in 2026
- Use your feedback to iterate
- Continue building a right-sized roadmap for AI applications



Related Sessions

AI With PCC EHR

Thursday, 7/17

2:30-3:30 PM

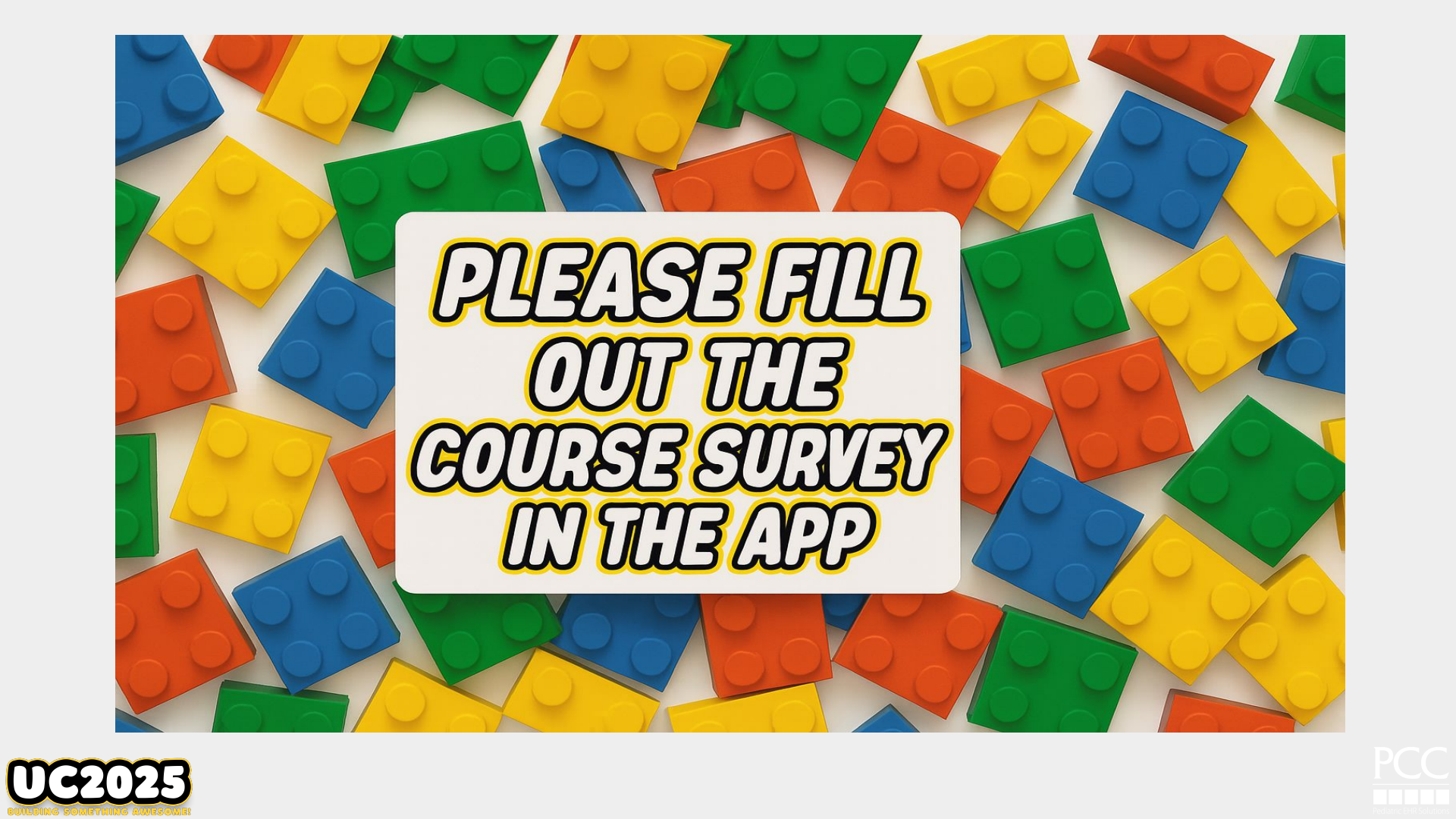
Emerald III

Hear from providers about their current use of AI tools, PCC EHR, and related workflows.

AI Scribe Survey for Clinicians

Please help us understand your experience with AI scribe tools and your priorities for a potential PCC AI scribe solution.



The background of the slide is a dense, overlapping pattern of colorful LEGO bricks. The bricks are primarily square and rectangular, in shades of blue, yellow, green, and orange. They are scattered across the entire frame, creating a vibrant and textured background.

***PLEASE FILL
OUT THE
COURSE SURVEY
IN THE APP***