

Patient Portal Self-Scheduling

Tuesday, April 29, 2025

Session Goals

1. Understand how to use self-scheduling within PCC EHR
2. Hear how other practices have managed their implementations & what they have learned
3. Determine ways to improve your system configuration and internal processes to make implementation smooth
4. Learn about upcoming self-scheduling features

Agenda

- Introduction
- Review of Self-Scheduling
- Panelist Q&A
- Upcoming features in 10.4 (and beyond)
- Feedback on upcoming training sessions

Panelist Introductions

- Dr. Katie Schafer, Bloom Pediatrics (MI)
- Linda Smith, Columbus Pediatric Associates (GA)
- Saundra Fitzgerald & Kimberly Kinkaid, MD Pediatric Associates (TX)
- Dr. Hiral Lavania, One Family Pediatrics (GA)

Review of Self-Scheduling

1. Configuring your visit reasons and types
2. Setting your scheduling preferences
3. Updating your scheduling templates
4. Enabling Portal scheduling

Portal Scheduling Visit Categories

The screenshot shows a window titled "Visit Reason Configuration" with four tabs: "Visit Reasons", "Visit Types", "Portal Scheduling", and "Preferences". The "Portal Scheduling" tab is active. Below the tabs, there is a section titled "Portal Scheduling" with a paragraph explaining that when scheduling appointments, portal schedulers will first select the category for the appointment, which will limit the visit reasons, providers, and locations. Below this, there is a red circle icon and the text "Portal Scheduling is Not Enabled".

Category: Sick

☐ Display for Portal Scheduling

Edit No Visit Reasons

Edit No Providers

Edit No Locations

Search Rules: Sick appointment searches will offer appointments beginning today, 1 hour from now, through the next 3 days.

Category: Well

☐ Display for Portal Scheduling

Edit No Visit Reasons

Edit No Providers

Edit No Locations

Search Rules: Well appointment searches will offer appointments beginning tomorrow through the next 3 months. When a patient has a known next physical date they will not be provided with appointments before that date.

Close

- Visit categories can be toggled on/off at anytime
- Visit reasons, providers, and locations can be selected for each visit category
- Search rules are important to keep in mind when thinking about which visit reasons to include, as they dictate when the portal user will see availability in the Patient Portal

Portal Scheduling Visit Display Name

The screenshot shows the 'Visit Reason Configuration' window with the 'Edit Visit Reason' sub-dialog open. The 'Portal Display Name' field is highlighted with a red box and contains the text 'Sick Visit'. The 'Visit Type' is set to 'Sick' and the 'Portal Scheduling Category' is 'not enabled'. The 'Print Visit Forms' section has 'Yes' selected. The 'Default Duration' is '15 min'. The 'Custom Durations' section lists four providers with their respective durations: Beverly Crusher, MD (15 min), Elizabeth Casey, MD (5 min), Kathleen Gomez, MD (5 min), and Leonard McCoy, MD (15 min). The 'Save + Next', 'Cancel', and 'Save' buttons are at the bottom of the sub-dialog. The 'Add', 'Delete', 'Edit', and 'Close' buttons are at the bottom of the main dialog.

Visit Reason Configuration

Visit Reasons | Visit Types | Portal Scheduling | Preferences

Visit Reasons

Provider: All

Visit Type: Sick

Edit Visit Reason

Visit Reason: Acute Visit

Visit Type: Sick

Portal Display Name: Sick Visit

Portal Scheduling Category: not enabled

Print Visit Forms: Yes

Default Duration: 15 min

Custom Durations:

Provider	Duration
Beverly Crusher, MD	15 min
Elizabeth Casey, MD	5 min
Kathleen Gomez, MD	5 min
Leonard McCoy, MD	15 min

Save + Next Cancel Save

Add Delete Edit Close

You can choose a different display name for your visit reason if you have any existing visit reasons that might not be clear to your portal users

Portal Scheduling Configuration Options

Option #1: This option enables new visit types, called Portal Visit types, that allow you to paint your schedule to only allow specific slots to be available when scheduling in the portal

Option #2: This option opens up any visit type that matches your Well/Sick visits to be schedulable in the Patient Portal

Visit Reason Configuration

Visit Reason Configuration

Visit Reasons Visit Types Portal Scheduling Preferences

Preferences

PCC EHR

Default Visit Reason: Sick Call

Default Visit Type for availability search

☒ Match Visit Type for selected Visit Reason

☐ Always default to: Any

Portal Scheduling

- ☒ Portal schedulers are only offered slots designated with a Portal Visit Type.
 - Use Portal (patterned) Visit Types in Provider Hours Scheduling Templates to assign slots for portal scheduling.
 - EHR appointment slot availability search by Visit Type includes the corresponding Portal Visit Type.
- ☐ Portal schedulers are offered all slots matching the color of the Visit Reason.

Close

Portal Scheduling: Option #1

Provider Hours

Provider Schedule | **Scheduling Templates**

Edit Scheduling Template

Template Name:

	Start Time	End Time	Location	Clear Hours
Monday:	8:00am	to 6:00pm	<input type="text" value="Lake Champlain"/>	<input type="button" value="+"/>
Tuesday:	8:00am	to 6:00pm	<input type="text" value="Lake Champlain"/>	<input type="button" value="+"/>
Wednesday:	8:00am	to 6:00pm	<input type="text" value="Lake Champlain"/>	<input type="button" value="+"/>
Thursday:	8:00am	to 6:00pm	<input type="text" value="Lake Champlain"/>	<input type="button" value="+"/>
Friday:	8:00am	to 6:00pm	<input type="text" value="Lake Champlain"/>	<input type="button" value="+"/>
Saturday:	<input type="text"/>	to <input type="text"/>	<input type="text"/>	<input type="button" value="+"/>
Sunday:	<input type="text"/>	to <input type="text"/>	<input type="text"/>	<input type="button" value="+"/>

Visit Type:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
10:30 am		Portal Sick	Portal Sick	Portal Sick	Portal Sick	Portal Sick	
10:45 am							
11:00 am		Sick	Sick	Sick	Sick	Sick	
11:15 am							
11:30 am		Portal Well	Portal Well	Portal Well	Portal Well	Portal Well	
11:45 am							
12:00 pm		Well	Well	Well	Well	Well	
12:15 pm							

Portal visit types can be distinguished from their counterparts by the diagonal lines overlaid on the visit type color

Portal Scheduling: Option #2

Provider Hours

Provider Schedule | Scheduling Templates

Edit Scheduling Template

Template Name:

Start Time

End Time

Location

Clear Hours

Monday: 8:00am to 6:00pm +

Tuesday: 8:00am to 6:00pm +

Wednesday: 8:00am to 6:00pm +

Thursday: 8:00am to 6:00pm +

Friday: 8:00am to 6:00pm +

Saturday: to +

Sunday: to +

Visit Type:

Clear Visit Types

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
10:30 am		Sick	Sick	Sick	Sick	Sick	
10:45 am							
11:00 am							
11:15 am		Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	
11:30 am		Well	Well	Well	Well	Well	
11:45 am							
12:00 pm							
12:15 pm							

Cancel Save

Self-Scheduling Master Switch & Disclaimer Message

Patient Portal Configuration

Configuration | Messaging Templates

Patient Portal Configuration

Payments

☒ Automatically post portal payments
Portal payments will be applied to the billing account charges from oldest to newest. Overpayments will be applied as unlinked credits.

Select payment types for autoposted portal payments

Visa Payment Type	Visa Card Payment
MasterCard Payment Type	Master Card Payment
Discover Payment Type	Discover Card Payment
American Express Payment Type	Novus Card Payment

Portal Messaging

Portal Messaging is **Enabled**. To disable, uncheck "Display in Portal" for all Portal Messaging templates.

Portal Message Inactivity

☐ Conversations become inactive 7 days after the last reply.

- Portal users cannot reply to inactive conversations.
- Conversations awaiting response by the practice will not become inactive.

☒ Conversations will never become inactive.

Portal Messaging Disclaimer

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.

Portal Scheduling

☒ Enable Portal Scheduling for categories set to Display

Portal Scheduling Disclaimer

This 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.

Cancel Save

- The checkbox is your master switch, once you check this off and hit save, you're officially live!
 - This checkbox can be toggled on/off at anytime
- The Portal Scheduling Disclaimer is the message that will appear at the top of the screen when a portal user is scheduling their visit

Portal User's Experience

Upcoming Appointments

Mon 11/25/24 9:00am Andrew

Schedule Appointment



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My Kid's Chart

Appointment Scheduling

This 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.

Patient

Kellyn Wilson

Appointment Category

Choose a category

Choose a category

Sick

Well

Continue

Exit

Portal User's Experience

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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

Once the portal user selects their visit reason, provider, and location options, they are presented with a list of the available appointments

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My Kid's Chart
Appointment Scheduling

Patient: Kellyn Wilson
Appointment Reason: 12yr - 13yr Well Visit

Select Appointment:

- ☒ **Mon 04/14/25 1:00pm**
Leonard McCoy
Winooski - 20 Main St, Ste 7
- ☐ **Mon 04/14/25 1:15pm**
Leonard McCoy
Winooski - 20 Main St, Ste 7
- ☐ **Mon 04/14/25 1:30pm**
Leonard McCoy
Winooski - 20 Main St, Ste 7
- ☐ **Mon 04/14/25 2:00pm**
Leonard McCoy
Winooski - 20 Main St, Ste 7
- ☐ **Mon 04/14/25 2:15pm**
Leonard McCoy

Select Appointment

Exit

Portal User's Experience

- Once they select and schedule their appointment, portal users have the option of adding an appointment note

The screenshot displays a web interface for scheduling a child's appointment. At the top, it says "My Kid's Chart" and "Appointment Scheduling". A green checkmark icon is followed by the text "Kellyn's Appointment is Scheduled". Below this, a dropdown menu shows "Mon 04/14/25 1:00pm Kellyn" with a downward arrow. The section "Appointment Note (Optional)" contains a text area with the placeholder text "Briefly share any symptoms of illness or issues to discuss at this visit." and a character count "0 of 100 characters". At the bottom, there are two buttons: "Add Note" (dark blue) and "Exit" (light blue).

Panelist Questions

EHR Configuration

- What EHR system settings and configuration did you update as part of the move to a self-scheduling?
- Were there any special considerations for your well and sick visit types?
- Did you choose to set up specific Portal self-scheduling slots in your provider schedules? Why or why not?

Portal & Self-Scheduling Access

- What have you done about patients who do not have a portal account associated with them?
- Are there families you would not allow to schedule via the Portal? How have you handled that?
- How have your families responded to the availability of self-scheduling?
- Are your patients & families using self-scheduling more or less than expected? Have you had to adjust your schedule configuration to accommodate a change in expectations?

Internal Processes

- What have you done to track self-scheduling?
- How have staff responded to the integration and change to processes? How have you ensured good office-wide communication about plans and processes?

Open Q&A

Upcoming Features

Upcoming Features

10.4 release is
scheduled for
October 2025

Stories with High Confidence of Release in 10.4:

- For All Practices
 - Customize Search Rules
 - New “Other” category
 - Prevent ONLY Portal Scheduling (by flag)
- For Care Center Practices
 - Enable Portal Scheduling by Care Center
- For Patients & Families
 - Schedule visits other than sick and well
 - Improve navigation through available appointments (Calendar)

Customize Search Rules - Sick

Confidence: High
Status: In Test

Category: Sick

☒ Display for Portal Scheduling

Edit

▶ 7 Visit Reasons



Edit

▶ 2 Providers



Edit

▶ 4 Locations



Appointment Search

Start: Offer appointments beginning: Today ▼ 1 hour ▼ from now.

Stop: ☒ Offer up to 4 days ▼ of appointments

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

New!

- Choose to start offering appointments today or tomorrow
- When today, customize delay (lots of options sooner than 1 hour!)
- Control the number of days offered - can restrict to same day only!

Customize Search Rules - Well

Confidence: High
Status: In Test

Category: Well

☒ Display for Portal Scheduling

Edit

▶ 1 Visit Reason



Edit

▶ 6 Providers



Edit

▶ 4 Locations



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: Tomorrow ▼

Stop: ☐ Offer up to 3 days ▼ of appointments

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

- All the same choices as “Sick” and...
- Continues to pay attention to next PE due and...
- A new stop date option allows search to end of templated schedule

New Category “Other”

Confidence: High
Status: In Test

Category: Other

☐ Display for Portal Scheduling

Edit No Visit Reasons

Edit No Providers

Edit No Locations

Appointment Search

Start: Offer appointments beginning: Tomorrow ▾

Stop: ☒ Offer up to 3 months ▾ of appointments

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

Want to offer appointments that are not exactly “Sick” and not exactly “Well”? **Meet our new “Other” category!** This new category allows you the flexibility to provide those “Other” types of appointments that just didn’t fit neatly into Sick and Well. Search rules are configurable.

Portal Calendar Navigation

Confidence: High
Status: In Test

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My Kid's Chart
Appointment Scheduling

Patient: Ariane Golden
Appointment Reason: Well Visit

Select Appointment:

◀ Wed, April 23, 2025 ▶

☒ **Wed 04/23/25 2:00pm**
Leonard McCoy
Burlington - 55 Old Church Street

☐ **Wed 04/23/25 2:15pm**
Leonard McCoy
Burlington - 55 Old Church Street

☐ **Wed 04/23/25 3:00pm**
Leonard McCoy
Burlington - 55 Old Church Street

☐ **Wed 04/23/25 3:15pm**
Leonard McCoy
Burlington - 55 Old Church Street

Select Appointment

Exit

The current Portal Scheduling functionality offers a long scrollable list of available appointments.

In 10.4 we are updating the way patients and families will navigate the available appointments.

Calendar will default to the first available day of appointments and then allow navigation with arrows and by choosing a specific date from the calendar.

Demonstration

Prevent ONLY Portal Scheduling

Confidence: Medium
Status: In Dev

Prevent scheduling for patients with any of these flags

Account Flags

Collection	▼	Prevent All Scheduling	▼	+
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Patient Flags

Dismissed	▼	Prevent All Scheduling	▼	
Needs Extra Time	▼	Prevent Portal Scheduling Only	▼	+

Configured in
Practice
Preferences

Currently, we can prevent ALL scheduling by flag. **In 10.4 we are adding a way to prevent portal scheduling WITHOUT preventing appointment book scheduling.** This will be useful for families that you'd rather schedule by phone because they need extra time or need other accommodations that portal scheduling can't handle right now.

Upcoming Features

Stories with Lower Confidence of Release in 10.4:

- For All Practices
 - Appointment Book Scheduling
 - Discretely record the vaccines patients and families request and display the requests in the visit for review and possibly pre-order
 - Portal Scheduling
 - A portal scheduling category for vaccine only visit reasons
- For Patients and Families
 - Ability to schedule vaccine visits
 - This would be designed to address “vaccine only visits” not “event style” clinics (event style vaccination is still on our roadmap).
 - Ability to schedule back-to-back visits for multiple patients

Feedback

Ensure Success Education Sessions - Live Polling



Join at
slido.com
#3705 335

Resources

You can learn more about the Portal Self Scheduling by visiting learn.pcc.com.

- [Portal Self Scheduling & Configuration](#)

Thank you for attending!