Patient Portal Self-Scheduling

Tuesday, April 29, 2025



Session Goals

- 1. Understand how to use self-scheduling within PCC EHR
- Hear how other practices have managed their implementations & what they have learned
- 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



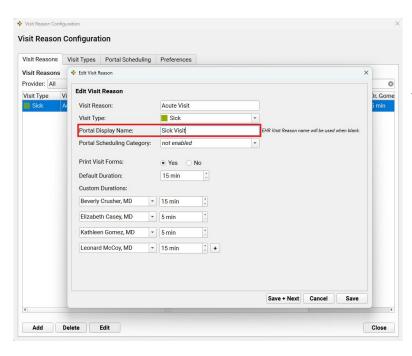
Portal Scheduling Visit Categories



- 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



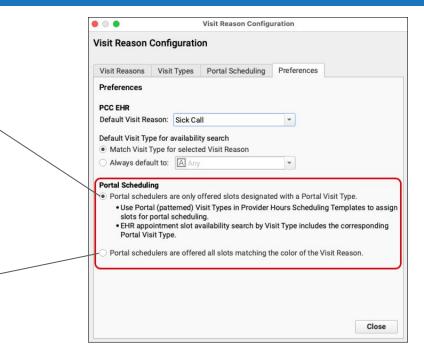
You can choose a different display name for your visit reason if you have any existing visit reasons that might not be clear to your portal users



Portal Scheduling Configuration Options

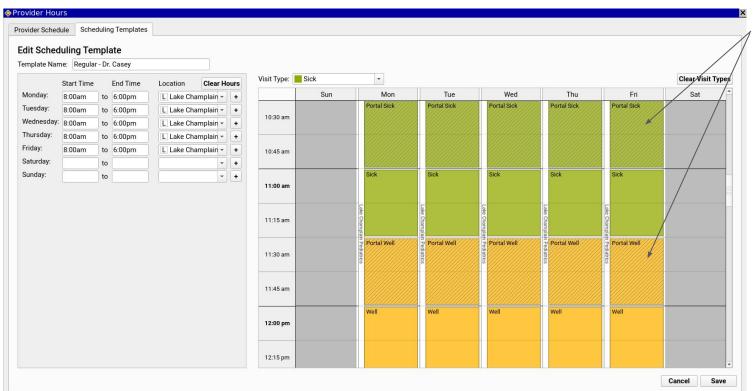
Option #1: This option enables new visit types, called Portal Visit types, that allow you to paint your schedule to only allow specific slots to be available when scheduling in the portal

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





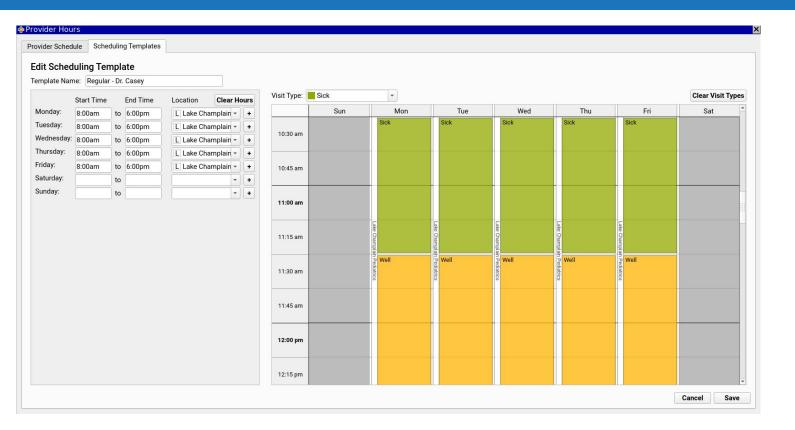
Portal Scheduling: Option #1



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

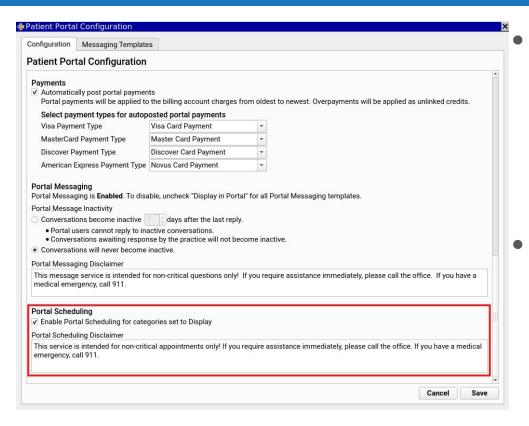


Portal Scheduling: Option #2





Self-Scheduling Master Switch & Disclaimer Message

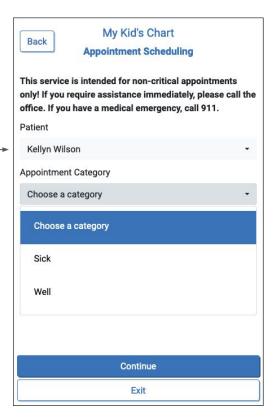


- The checkbox is your master switch, once you check this off and hit save, you're officially live!
 - This checkbox can be toggled on/off at anytime
- The Portal Scheduling
 Disclaimer is the
 message that will
 appear at the top of the
 screen when a portal
 user is scheduling their
 visit



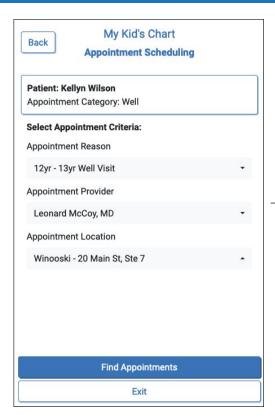
Portal User's Experience



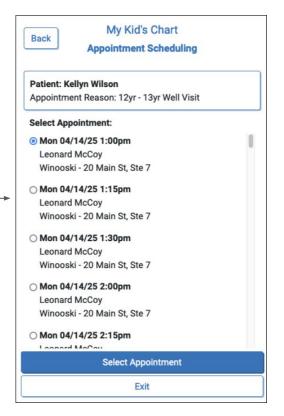




Portal User's Experience



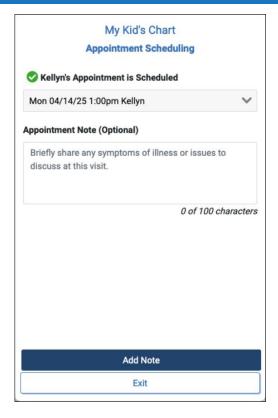
Once the portal user selects their visit reason, provider, and location options, they are presented with a list of the available appointments





Portal User's Experience

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





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

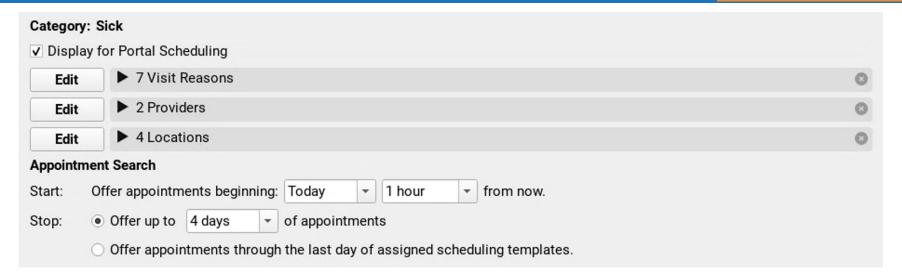
Stories with High Confidence of Release in 10.4:

- 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)



Confidence: High Status: In Test

Customize Search Rules - Sick



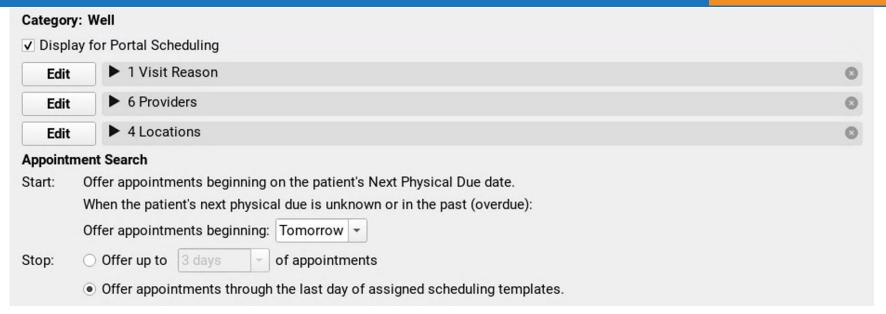
New!

- 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!



Confidence: High Status: In Test

Customize Search Rules - Well



- 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"

Categor	y: Other
Displa	ay for Portal Scheduling
Edit	No Visit Reasons
Edit	No Providers
Edit	No Locations
Appointr	nent Search
Start:	Offer appointments beginning: Tomorrow 🔻
Stop:	Offer up to 3 months of appointments
	Offer appointments through the last day of assigned scheduling templates.

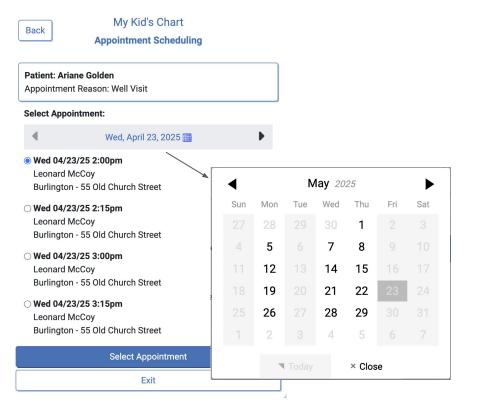
Want to offer appointments that are not exactly "Sick" and not exactly "Well"? **Meet our new "Other" category!** This new category allows you the flexibility to provide those "Other" types of appointments that just didn't fit neatly into Sick and Well. Search rules are configurable.



Confidence: High Status: In Test

Pediatric FHR Solutions

Portal Calendar Navigation



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 pa	tients with any of these flags
Account Flags	
Collection	▼ Prevent All Scheduling +
Patient Flags	
Patient Flags Dismissed	▼ Prevent All Scheduling ▼

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!

