

# Patient Portal Self-Scheduling

Thursday, June 26th, 2025

# Session Goals

1. Understand how to use self-scheduling within PCC EHR
2. Determine ways to improve your system configuration and internal processes to make implementation smooth
3. Explore the Portal experience with Self-scheduling

# Agenda

- Introduction
- Review of Self-Scheduling
- Showcase of future Self-Scheduling enhancements
- Feedback on upcoming training sessions

# Review of Self-Scheduling

1. Configure your visit reasons and types
2. Set your scheduling preferences
3. Update your scheduling templates
4. Enable 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, a red circle icon indicates "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 Reason' field is set to 'Acute Visit' and the 'Visit Type' is set to 'Sick'. The 'Portal Scheduling Category' is set to 'not enabled'. The 'Print Visit Forms' section has radio buttons for 'Yes' and 'No'. The 'Default Duration' is set to '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 No

Default Duration: 15 min

Custom Durations:

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: MasterCard 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

Back

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

[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

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

[Back](#)

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

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

# Reporting

- Navigate to the Report Library and find the “Appointments by Scheduling User” report
- Enter “portal” into the search filter to filter the report down to all appointments made via the Patient Portal

**Report Library**

### Appointments by Scheduling User

Review appointments scheduled yesterday, grouped by the user who scheduled the appointment. Portal Scheduled appointments are grouped together, reflected as Scheduled by "Portal User".

**Appointments / Blocks:** Appointments Only  
**Appointment Creation Date:** From 05/27/2025 to 06/26/2025

Columns: 10 Displayed    Group By: Appointment Scheduled By    Search Filter: portal

:: Appointment Date	:: Appointment Time	:: Appointment Duration	:: Appointment Provider	:: Appointment Location	:: Appointment Reason	:: Appointment Note	:: Patient Name	:: Pat
▼ Portal User (1 result)								
06/27/2025	8:00am	15	Elizabeth Mary Casey, MD	Lake Champlain Pediatrics	10yr - 11yr Well Visit		Flintstone, Pebbles	10y

1 of 570 Results

**Report Library**    Back    Schedule    Export    Close    Print

# 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
- 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)

## Stories with Medium-Low Confidence of Release in 10.4:

- Prevent ONLY Portal Scheduling (by flag)
- Schedule back-to-back appointments for patients

# 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

No Visit Reasons

No Providers

No Locations

## Appointment Search

Start: Offer appointments beginning:

Stop: ☒ Offer up to  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

Back

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

May 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

▼ Today × Close

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.

# Prevent ONLY Portal Scheduling

Confidence: Medium  
Status: In Dev

## Prevent All Scheduling

Edit

▶ 2 Account Flags



Edit

▶ 3 Patient Flags



## Prevent Only Portal Scheduling

Edit

▶ 1 Account Flag



Edit

▶ 1 Patient Flag



Configuration moved from Practice Preferences to Preferences tab in Scheduling Configuration (previously Visit Reason configuration)

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.

# Schedule Back-to-Back Appointments

Confidence: Low  
Status: In Dev

[Back](#) 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.

Appointment Category

Choose a category

Patient

Choose a patient

[+](#) Add Another Patient (optional) to schedule back-to-back visits

[Continue](#)

[Exit](#)

13:46 Launcher SOS

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

One page per patient,  
<- Label pages as Patient # of #->

Patient 1 of 2:

**Jimmy Jones**

Appointment Reason

Choose a reason

Note

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

0 of 100 characters

[Continue](#)

[Exit](#)

bopeep6.pcc.com

13:46 Launcher SOS

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

Patient 2 of 2:

**Samantha Jones**

Appointment Reason

Choose a reason

Note

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

0 of 100 characters

[Continue](#)

[Exit](#)

Omit any visit reason choices for patient 2 that are not the same color (visit type) as the visit reason selected for patient 1.

13:46 Launcher SOS

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

Review:

**Jimmy Jones**

Appointment Reason: Sick Call

Note

Cough 3 days

0 of 100 characters

**Samantha Jones**

Appointment Reason: Sick Call

Note

Sore throat

0 of 100 characters

[Continue](#)

[Exit](#)

Review page shows all patients.

- Scroll on right if needed.
- Visit reason is not editable.
- Note is editable.

# 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](https://learn.pcc.com).

- [Portal Self Scheduling & Configuration](#)

**Thank you for attending!**