

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

Visit Reason Configuration

Visit Reasons Visit Types Portal Scheduling Preferences

Portal Scheduling

When scheduling appointments, portal schedulers will first select the category for the appointment they wish to schedule. This selection will limit the visit reasons, providers, and locations to those that you configure below. Each category's search rules will also be applied.

● 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 a 'Visit Reason Configuration' window with an 'Edit Visit Reason' sub-dialog. The 'Portal Display Name' field is highlighted with a red box and contains the text 'Sick Visit'. The 'Visit Reason' is 'Acute Visit' and the 'Visit Type' is 'Sick'. 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 visible at the bottom of the dialog.

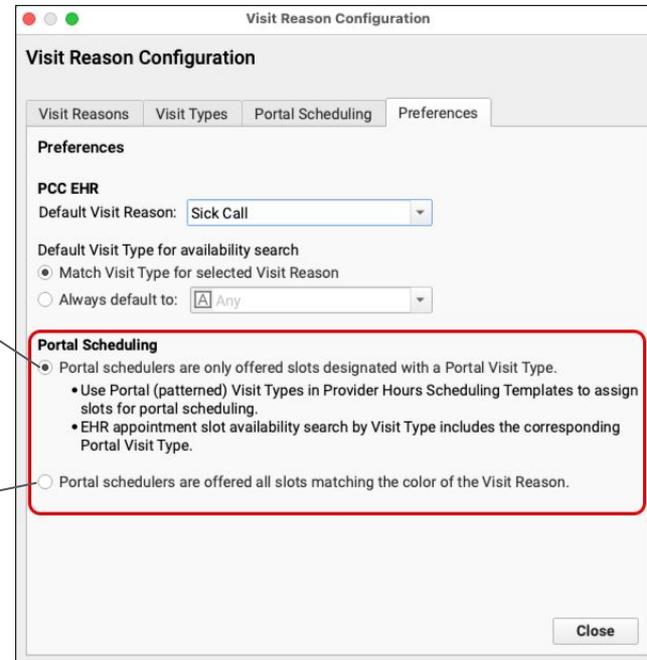
Provider	Duration
Beverly Crusher, MD	15 min
Elizabeth Casey, MD	5 min
Kathleen Gomez, MD	5 min
Leonard McCoy, MD	15 min

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 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: Regular - Dr. Casey

	Start Time	End Time	Location	Clear Hours
Monday:	8:00am	to 6:00pm	L Lake Champlain	+
Tuesday:	8:00am	to 6:00pm	L Lake Champlain	+
Wednesday:	8:00am	to 6:00pm	L Lake Champlain	+
Thursday:	8:00am	to 6:00pm	L Lake Champlain	+
Friday:	8:00am	to 6:00pm	L Lake Champlain	+
Saturday:		to		+
Sunday:		to		+

Visit Type: Sick

Clear Visit Types

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

Cancel Save

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	<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		Sick	Sick	Sick	Sick	Sick	
10:45 am							
11:00 am							
11:15 am		Lake Champlain Pediatrics					
11:30 am		Well	Well	Well	Well	Well	
11:45 am							
12:00 pm							
12:15 pm							

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



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: ▼

Stop: Offer up to ▼ 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:

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

▶ 2 Account Flags

▶ 3 Patient Flags

Prevent Only Portal Scheduling

▶ 1 Account Flag

▶ 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.

- [Portal Self Scheduling & Configuration](#)

Thank you for attending!