

Patient Portal Self-Scheduling

Tuesday, February 24th, 2026

Session Goals

1. Understand how to use Portal 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

- Review recent improvements to Portal Scheduling
- How to start using Portal Scheduling
- Feedback on upcoming training sessions

What's New?

Fall 2025 Release (10/12/25)

- New Scheduling Categories: “Other” and “Vaccine Only”
- Customize the search rules for each category
- Enable Portal Scheduling by Care Center
- Prevent Portal Scheduling by Patient and Account flags
- Schedule multiple patients simultaneously

What's New?

Winter 2026 Release (2/15/26)

- Portal scheduling configuration facelift
- Option to require scheduling with PCP
- Option to require appointment note
 - As well as the ability to configure the prompt for the note in the portal

Let's Get Started!

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

Scheduling Configuration

Visit Reasons Visit Types **Portal Scheduling** Preferences

Portal Scheduling ● Portal Scheduling is Enabled

Portal scheduling is restricted to the categories you choose to display and to the visit reasons, providers, and locations selected for each category. Portal users will only be offered appointment options within the specified Appointment Search start and stop time frames.

Categories	Display
Sick	✓
Well	✓
Vaccine Only	✓
Other	✓

Sick Display for Portal Scheduling

Edit ▶ 10 Visit Reasons

Edit ▶ 8 Providers

Require patients to schedule with Primary Care Provider

Edit ▶ 5 Locations

Enable multipatient scheduling and limit to 3 patients

Appointment Note

Note Instruction: Briefly share any symptoms of illness or issues to discuss at this visit. (73 of 100)

Require appointment note

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

Close

- Visit categories can be toggled on/off at anytime
- You can require that patients must be scheduled with their PCP, require that a note is entered, and configure the note instruction for each category
- Search rules allow your practice to configure each category to offer appointments based on your practice's scheduling workflows

Portal Scheduling Visit Display Name

The screenshot shows a 'Visit Reason Configuration' window with several tabs: 'Visit Reasons', 'Visit Types', 'Portal Scheduling', and 'Preferences'. The 'Portal Scheduling' tab is active. Within this tab, there is an 'Edit Visit Reason' sub-dialog. The sub-dialog has the following fields and options:

- Visit Reason: Acute Visit
- Visit Type: Sick
- Portal Display Name: Sick Visit (highlighted with a red box)
- 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

Buttons at the bottom of the sub-dialog include 'Save + Next', 'Cancel', and 'Save'. Buttons at the bottom of the main dialog include 'Add', 'Delete', 'Edit', and '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/etc. visits to be schedulable in the Patient Portal

Scheduling Configuration

Visit Reasons Visit Types Portal Scheduling Preferences CHADIS

Preferences

Appointment Book

Default Visit Reason: Sick Call

Default Visit Type for availability search

Match Visit Type for selected Visit Reason

Always default to: Any

Always display location banners

Display "All Locations" scheduling option

Present Patient Details when scheduling appointments

Prevent All Scheduling

Edit ▶ 2 Account Flags

Edit ▶ 3 Patient Flags

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.

Prevent Only Portal Scheduling

Edit ▶ 1 Account Flag

Edit ▶ 1 Patient Flag

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

The screenshot shows a software window titled "Patient Portal Configuration" with a "Messaging Templates" tab selected. The "Patient Portal Configuration" section is expanded to show several options:

- 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** (highlighted with a red box)
 - 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.

At the bottom of the window are "Cancel" and "Save" buttons.

- 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

Fri 02/20/26 3:15pm Krista



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.

Appointment Category

Choose a category



Patient

Choose a patient



Continue

Exit

Portal User's Experience

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

Krista "Krissy" Joseph Hetrick, III ^

Appointment Reason
Choose a reason v

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

0 of 100 characters

Continue

Exit

Once the portal user selects their visit reason and enters a note, they are then prompted to select a provider and location for the appointment

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

Scheduling Preferences:

Appointment Provider
Any provider v

Appointment Location
Any location v

Find Appointments

Exit

Portal User's Experience

Back My Kid's Chart
Appointment Scheduling

Select Appointment:

Fri, February 20, 2026

- Fri 02/20/26 3:15pm**
Beverly Crusher, MD
Winooski - 20 Main St, Ste 7
- Fri 02/20/26 3:30pm**
Fred Jones, M.D.
Winooski - 20 Main St, Ste 7
- Fri 02/20/26 4:00pm**
Fred Jones, M.D.
Winooski - 20 Main St, Ste 7
- Fri 02/20/26 4:30pm**
Fred Jones, M.D.
Winooski - 20 Main St, Ste 7
- Fri 02/20/26 5:00pm**
Fred Jones, M.D.
Winooski - 20 Main St, Ste 7
- Fri 02/20/26 5:30pm**
Fred Jones, M.D.
Winooski - 20 Main St, Ste 7

Select Appointment

Exit

The user is then brought to a schedule screen, where they can browse for an appointment that works best for them.

Once they've selected an appointment, they can review the details before scheduling

Back My Kid's Chart
Appointment Scheduling

Review Selected Appointment:

Fri 02/20/26 3:15pm Krista

Sick - Headache
Beverly Crusher, MD
Winooski - 20 Main St, Ste 7
This appointment is not yet scheduled

Schedule

Exit

Portal User's Experience

Success! After the user hits the “Schedule” button, they are presented with a confirmation that their appointment has been scheduled.

My Kid's Chart
Appointment Scheduling

Confirmation:

Fri 02/20/26 4:00pm Krista ^

Sick - Headache
Elizabeth Mary Casey, MD
Uptown - Upper Lake Street, Champlain Suite Upstairs
✔ Krista's appointment is scheduled

Exit

Reporting

- Navigate to the Report Library and run the “Appointments by Scheduling User” report
- Ensure that the “Appointment Scheduled by User” column is displayed
- 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 01/21/2026 to 02/20/2026

Columns: 11 Displayed Group By: Appointment Scheduled By Search Filter: portal

Appointment Scheduled By	Appointment Date	Appointment Time	Appointment Duration	Appointment Provider	Appointment Location	Appointment Reason	Appointment Note	Patient
Portal User (3 results)								
Portal User	02/12/2026	7:00am	15	Mark Williams, M.D.	Burlington Peds - New North End	New Sick Call		Lasc...
Portal User	02/20/2026	3:15pm	15	Beverly Crusher, MD	Winooski Pediatrics	Sick - Headache	Krista has had a really bad headache for the last day.	Hetri...
Portal User	02/20/2026	4:00pm	15	Elizabeth Mary Casey, MD	Lake Champlain Pediatrics	Sick - Headache	note	Hetri...

3 of 855 Results

Report Library Schedule Report Export Back Print

Open Q&A

Feedback

Ensure Success Education Sessions - Live Polling



Join at
slido.com
#867 531

Resources

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

- [Portal Self Scheduling & Configuration](#)

Thank you for attending!