Configure Portal Scheduling Checklist

Prerequisites & Considerations

Visit Types

Portal scheduling uses PCC EHR's Visit Types to link patient portal scheduling to the Appointment Book. You must add at least one visit type to proceed with portal scheduling. PCC suggests at least two: one for each visit category, sick and well.

If your office does not currently have any Visit Types, Open Visit Reasons in the EHR's Configuration menu and select the Visit Types tab and click "Add". At minimum, you should add a visit type for each Portal Category you select in the Enable Categories step below. For example, you might create a Visit Type called "Preventive" for visit reasons in the Sick category, and another called "Acute" for visit reasons in the Sick category. Don't worry too much about what to name your Visit Types, you can change the name at any time. You do not need to limit yourself to one Visit Type, but using one Visit Type will get the job done. You can expand to using more Visit Types later if needed.

For an illustrated walkthrough of adding visit types, visit Configure the Appointment Book.

Care Centers

If your office uses Care Centers, the portal will reduce the provider and location choices to those that match the selected patient's Care Center, omitting any providers and locations that you uncheck in the configuration panel.

You will need to make at least one provider and location available for each Care Center, otherwise, a patient will be able to click the blue button to start scheduling and discover that the choice lists for providers and/or locations are empty. The patient would then not be able to schedule and the tool would look broken.

We anticipate adding more Care Center features in a future release, and specifically would like to allow practices to enable the tool per Care Center, but that is not currently a feature of this version.

Enable Categories

- ☐ **Check the applicable "Display" Checkbox for the categories to wish to enable**
  See Steps 1 & 2 of "Configuring Visit Reasons for Portal Self Scheduling"

Configure Sick Category

If you decided not to allow portal schedulers to schedule sick visits, skip to the next section.

- ☐ **Connect Visit Reasons to Portal Scheduling Category: Sick**
  - Use the Edit button to select "Sick" Visit Reasons.
- ☐ **Review "Sick" Visit Reason names and add alternate names as needed**
  - Add Portal Display Names via the Visit Reasons tab.
  - See documentation for "Review Your Visit Reasons"
- ☐ **Edit Providers and Locations for Category: Sick**
  - Edit and select the providers and locations you would like portal users to see when they schedule.
  - **Omit any providers and locations that were created for administrative purposes** (Providers like "Office", your practice name, or "Dr. Flu" and Locations like Flu Clinics, Telemedicine, or specialty locations that handle visits that aren't sick or well)
  - **Remember, if you use Care Centers,** you will need to make at least one provider and location available for each Care Center.
  - See Steps 4 & 5 of "Configuring Visit Reasons for Portal Self Scheduling"

Configure Well Category

- ☐ **Connect Visit Reasons to Portal Scheduling Category: Well**
  - Use the Edit button to select "Sick" Visit Reasons.
  - See Step 3 of "Configuring Visit Reasons for Portal Self Scheduling"
- ☐ **Review "Well" Visit Reason names and add alternate names as needed**
  - Add Portal Display Names via the Visit Reasons tab.
  - See documentation for "Review Your Visit Reasons"
- ☐ **Edit Providers and Locations for Category: Well**
  - Edit and select the providers and locations you would like portal users to see when they schedule.
  - **Omit any providers and locations that were created for administrative purposes** (Providers like "Office", your practice name, or "Dr. Flu" and Locations like Flu Clinics, Telemedicine, or specialty locations that handle visits that aren't sick or well)
  - **Remember, if you use Care Centers,** you will need to make at least one
  - See Steps 4 & 5 of "Configuring Visit Reasons for Portal Self Scheduling"

Make Slots Available for Portal Scheduling

- [ ] **Decide how to make appointment slots available to portal users**
    - Choose an option in the Preferences tab.
    - See documentation for "Configure Portal Scheduling Preferences"
    - What option should I choose?
        - "Portal schedulers are only offered slots designated with a Portal Visit Type."
            - This is the more conservative option, though it requires the additional step of designating which time slots are available for portal scheduling.
            - Select this option if you currently use Visit Type colors to designate the types of appointments for specific time slots in your schedule, and you intend to make a subset of those slots available to Portal Schedulers. In Scheduling Templates, you'll select which time slots should be available for Portal Scheduling.
        - "Portal schedulers are offered all slots matching the color of the visit reason"
            - This is the less conservative option, and no further setup is necessary.
            - Select this option if you currently use Visit Type colors to designate the types of appointments for specific time slots in your schedule and you want to make all of those same time slots available to Portal Schedulers. Portal Schedulers searching for appointments would get the same results that your staff gets when they search availability by color in the appointment book.
        - **If you are new to visit types**, either option will work. Option 2, "portal schedulers are offered all slots…" is the least work to implement. If your staff isn't using visit types to find time slots, you can use option 2 and color code with the regular visit types. Anything you leave uncoded (white) cannot be scheduled by Portal Users. If you end up needing to control slot availability for staff separately from the availability for portal scheduling, you can switch to option 1 when that need arises.

- [ ] **Color Code your Templates (If you selected Option 2 you may not need to do this see below)**
    - See documentation for "Update Your Templates for Portal Scheduling"
    - **If you chose option 1,** "Portal schedulers are only offered slots designated with a Portal Visit Type." you will need to add Portal (patterned) Visit Types to your templates.
        - Open Provider Hours from PCC EHR's Tool menu.
        - Select each template

        - On the right side at the top, choose the Portal (patterned) Visit Types and "paint" them into the slots to show where each kind of appointment can be scheduled.
            - **If you are already using visit types**, consider just switching some slots of each color to the corresponding patterned visit type.
            - **If you are brand new to visit types**, choose each patterned Visit Type and click the slots where you want to make available to Portal Schedulers for that visit type.
    - **If you chose option 2,** "Portal schedulers are offered all slots matching the color of the visit reason" and
        - **if you are already using Visit Types,** you can skip this step. Just make sure there are some slots color coded for every color visit reason you have connected to a Portal Scheduling category.
        - **if you chose option 2 and you are new to Visit Types**
            - Open Provider Hours from PCC EHR's Tool menu.
            - Select each template
            - On the right side at the top, choose each Visit Type and then paint the slots where each kind of appointment can be scheduled. Portal schedulers AND your staff will see and be able to use this color coding to find appointment slots.

Enable Portal Scheduling, Test, and Run Report

- [ ] **Enable Portal Scheduling**
    - Open Patient Portal Configuration in PCC EHR's Tools Menu and check the box for "Enable Portal Scheduling for categories set to Display". See documentation for "Enable Portal Scheduling"
    - Consider adjusting the disclaimer as needed for your practice.
- [ ] **Test Portal Scheduling**
    - **Create a portal account with a fake patient on it.**
    - Sign into the patient portal
    - Click the blue button Schedule Appointment
    - Choose a patient
    - Choose category Sick (if you enabled this category in the first step)
    - Choose a provider and location
    - Continue to find appointments
    - Review the appointment options you get to make sure they look right
    - Choose one
    - Schedule
    - Optionally make a note
    - Repeat with category Well
- [ ] **Review how these appointments look on the Schedule screen**
    - On the EHR schedule screen, change the date to the day of your appointments
    - Appointments will have diagonal stripes on the visit type swatch

- Clicking on the visit reason name will display the note

- [ ] **Review how these appointments look in the Appointment Book**
    - Open the patient's chart
    - From the component Appointment History, click the appointment and click "Edit"
    - This will bring you into the appointment book to the spot where the appointment is so that you can see how it looks.
    - Left side of the appointment will have diagonal strips
    - The bottom left panel shows the appointment was scheduled by the portal user
    - You can cancel out of your edit… we just clicked Edit to get here fast.
- [ ] **Run the report Appointments by Scheduling User**
    - Open Report Library in PCC EHR's Reports menu.
    - Run the report "Appointments by Scheduling User"
        - This report is designed to run each day looking at the appointments made yesterday.
        - When testing, change the filter "Appointment Creation Date" to today.
    - On the results screen, type "Portal User" into the search box to limit the report down to just the ones scheduled by Portal Users.
    - When using this to actually review appointments that were portal scheduled, you'll run the report each day for yesterday. You'll review the appointments made by "Portal Users" (use the search filter to find these quickly) to see if any adjustments need to be made. You'll be looking for things like the need to increase the duration because of a patient flag, or maybe you'll want to change the visit reason based on the note that was added.