Portal Scheduling

PCC Users' Conference 2025

Erica Greenwood, PCC Software Design
Amanda Smith, PCC Business Analyst

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Session Goals

1. Portal Scheduling - the Portal User Experience

2. How to get started - Configuration

3. Considerations

4. Future of Portal Scheduling

Portal User Experience 10.3

Portal User Experience 10.3

My Kid's Chart
Appointment Scheduling

Back

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

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My Kid's Chart
Appointment Scheduling

Back

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

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Portal User Experience 10.3

After a portal user schedules an appointment, the option to add an appointment note displays.
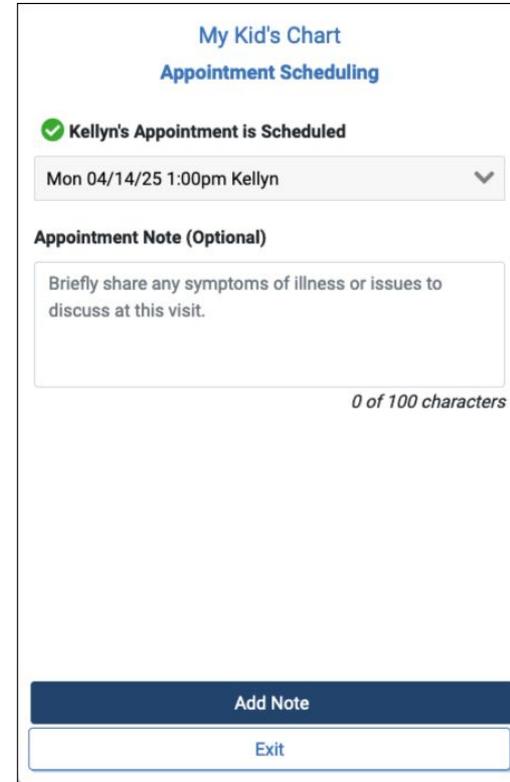
Portal User Experience 10.4

- New Features with High Confidence of delivery in 10.4:
    - Improve Navigation through Available Appointments
    - Ability to schedule appointments other than Sick and Well
- New Features with Lower Confidence of delivery in 10.4:
    - Multi-patient Scheduling
        - This feature includes moving the appointment note forward in the process and removing the "(Optional)" notation.

We'll provide a sneak peek of some of these new features later in the presentation!
Let's move on to how to get started with Portal Scheduling...

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How to get Started with Portal Scheduling

Overview of Portal Scheduling Configuration steps:

1. Configure your Visit Categories
2. Set your scheduling preference (how you will designate availability)
3. Update your scheduling templates (if needed)
4. Enable Portal scheduling

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Configure Visit Categories

- **Visit Categories are groups of visit reasons that follow the same search rules.** In 10.3 there are two categories, Sick and Well. In 10.4 we are adding at least one new category (maybe two).
- **For each Visit Category, you can limit the visit reason, provider, and location options** the portal users will see and be able to choose.
- Search rules are important to keep in mind when deciding which visit reasons to include. **Search rules are applied to the entire category** and will affect availability. Search rules are fixed for 10.3 and editable in 10.4.
- Visit Categories can be toggled on/off at any time.

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Set Portal Scheduling Preferences (for designating Availability)

Generally speaking, Portal Scheduling finds slots that are "painted" to match the visit type color assigned to the visit reason.

Option #1: This option enables new visit types, called Portal (patterned) Visit types and **allows you to paint your schedule to only allow specific slots to be available when scheduling in the portal.**

Option #2: This option **allows portal users to schedule into any available slot that matches the color of the visit reason.**

Both options are restricted by the Visit Category Search Rules.
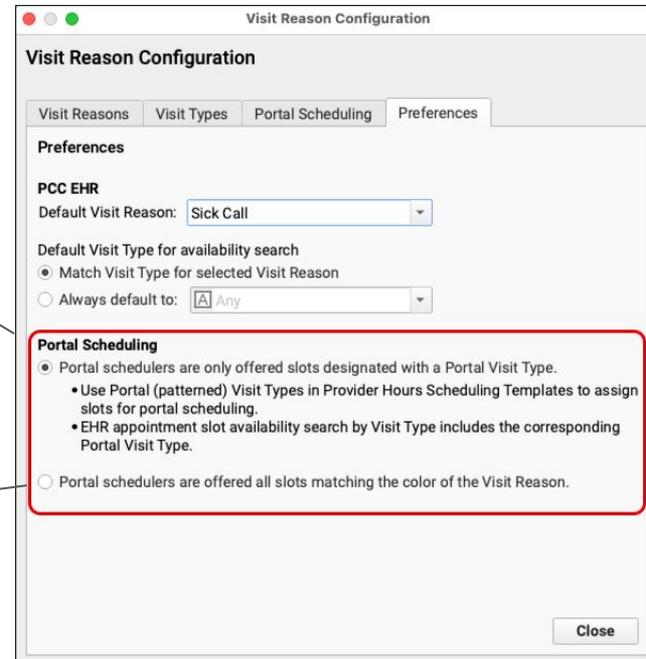
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How to decide between Option 1 and Option 2

If you ARE NOT currently using visit type colors at all right now, you can probably **just use Option 2** and "paint" colors into the slots you want to use for Portal Scheduling.

If you ARE currently using visit type colors to designate which appointments can go into which slots, you'll want to **decide if all these same slots can be shared with the portal users (Option 2), OR** if you want to **designate specific (typically fewer) portal scheduling slots (Option 1).**

Let's look at two examples of "painted" templates. Option 2 will be first (it's simpler) and then Option 1.

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Portal Scheduling: Option #2

If you select **Option 2,** when a visit reason is scheduled in the portal, the portal user is offered **any appointment slots that is "painted" with the same color assigned to the visit reason.**

Portal Scheduling: Option #1

When Option 1, is selected, **the color still needs to match the visit reason but portal users are only offered slots with diagonal "pattern" on the visit type color**. Your staff can still find ALL slots but portal users see only the slots that are patterned.

Update Your Templates

If you haven't ever used visit types or painted your templates, you will need to **assign visit types to visit reasons and "paint" the slots** in your provider's templates.

If you do currently use visit types and you currently paint your templates, **and you choose Option 1**, you'll need to **apply patterns to the slots in your templates** to designate the slots for portal scheduling.

If you currently use visit types and you choose Option 2, you're all set … template updates are not needed.

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Self-Scheduling Master Switch & Disclaimer Message

- The **enablement checkbox in Patient Portal Configuration is your master switch**. Once you check this and hit save, you're officially live!
  - This checkbox can be toggled on/off at anytime
- The Portal Scheduling Disclaimer displays at the top of the first screen the portal user sees when scheduling their visit.

Considerations

- Do you want to offer both Sick and Well to start, or just one of these?
- Are your current Visit Reasons sufficient or do you need new ones?
    - Example… Do you want to offer Well by age or just Well Visit? (Removing granularity has implications at a protocol level.)
- Do you need to adjust Visit Reason names to ensure they are clear for portal users?
    - Consider clarifying abbreviations and removing medical lingo.
- Do you have provider and location options that would be confusing for portal users or maybe you want to prevent portal scheduling for a provider with a complicated schedule?
    - Providers and locations that were created for administrative purposes like "Dr. Flu" or "Office" can be omitted.

Considerations

- Consider the disclaimer note. This was intended for legal disclaimer, though some practices have added other information. Length is a consideration... be aware that making it too long it will push the controls for scheduling off the screen, especially on a mobile device.
- Create a plan for reviewing appointments that have been scheduled.
  - Report Library report - Appointments by Scheduling User
  - Scheduling User "Portal User"
- Training
  - Staff will see diagonal pattern on portal scheduled appointments
  - Review the plan for monitoring portal scheduled appointments
- Enablement and Testing
  - Once enabled, it is recommended to use a test portal user and patient to schedule a test appointment. Test each enabled category to ensure it is operating as you expected.

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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

Sneak Peek!

Let's take a look at some features coming in 10.4!

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10.4 Upcoming Features

Stories with High Confidence of Release in 10.4:

- For Portal Users
  - Improved Navigation through Appointment Options (calendar style)
- For All Practices
  - Customize Search Rules
  - New "Other" category (also benefits portal users)
  - Prevent ONLY Portal Scheduling (by flag)
- For Care Center Practices
  - Enable Portal Scheduling by Care Center

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10.4 Portal Calendar Navigation

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

◀	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

Select Appointment

Exit

▼ 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.

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Customize Search Rules - Sick

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!

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Customize Search Rules - Well

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

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New Category "Other"

Category: Other

☐ Display for Portal Scheduling

Edit	No Visit Reasons
Edit	No Providers
Edit	No Locations

Appointment 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.

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Prevent ONLY Portal Scheduling

Prevent All Scheduling

| Edit | ▶ 2 Account Flags | ⊗ |
| Edit | ▶ 3 Patient Flags | ⊗ |

Prevent Only Portal Scheduling

| Edit | ▶ 1 Account Flag | ⊗ |
| Edit | ▶ 1 Patient Flag | ⊗ |

Configured in Scheduling 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.

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Wrap up

Over 50 practices are using Portal Scheduling.

Practices have reported that their patients love it and phone calls are reduced.

This new tool is growing fast... lots of new features are coming in 10.4 in October!

Enabling Portal Scheduling requires a little planning but is overall pretty easy to enable. A master switch can disable it if you try it and decide it isn't for you.

Consider getting started with Portal Scheduling today!

Questions? Ask now or talk to your CA!

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