

# Portal Scheduling

PCC Users' Conference 2025

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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

### 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 Experience 10.3

[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 Experience 10.3

After a portal user schedules an appointment, the option to add an appointment note displays.

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

# 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...**

# 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

# Configure 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. It contains a section titled "Portal Scheduling" with a description: "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." Below this is a red status indicator and the text "Portal Scheduling is Not Enabled".

**Category: Sick**

☐ Display for Portal Scheduling

No Visit Reasons

No Providers

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

No Visit Reasons

No Providers

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.

- **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.



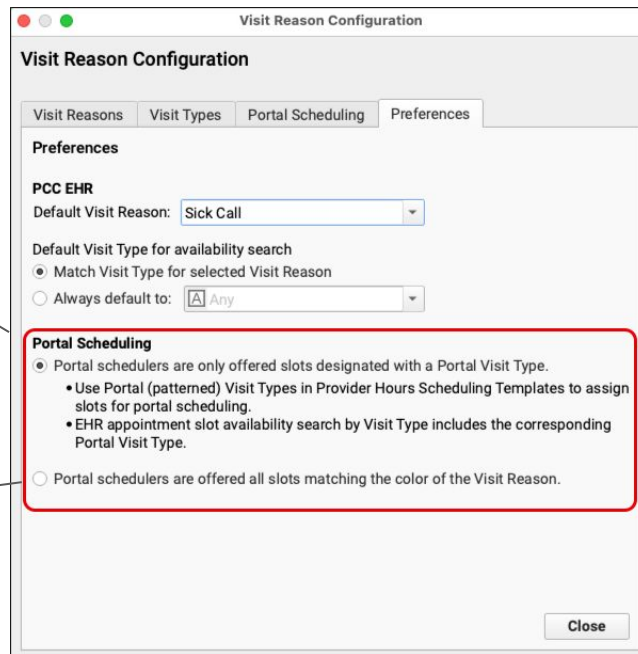
# Set Portal Scheduling Preferences (for designating Availability)

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.



The screenshot shows a window titled "Visit Reason Configuration" with four tabs: "Visit Reasons", "Visit Types", "Portal Scheduling", and "Preferences". The "Preferences" tab is active. Under the "PCC EHR" section, there is a "Default Visit Reason:" dropdown menu set to "Sick Call". Below that, under "Default Visit Type for availability search", there are two radio button options: "Match Visit Type for selected Visit Reason" (which is selected) and "Always default to:" followed by a dropdown menu set to "Any". The "Portal Scheduling" section is highlighted with a red border and contains two radio button options: "Portal schedulers are only offered slots designated with a Portal Visit Type." (which is selected) and "Portal schedulers are offered all slots matching the color of the Visit Reason." The selected option has two bullet points: "• Use Portal (patterned) Visit Types in Provider Hours Scheduling Templates to assign slots for portal scheduling." and "• EHR appointment slot availability search by Visit Type includes the corresponding Portal Visit Type." A "Close" button is located at the bottom right of the dialog.

# 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.

# 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	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							

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

**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" value=""/>	to <input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/>
Sunday:	<input type="text" value=""/>	to <input type="text" value=""/>	<input type="text" value=""/>	<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		Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	Lake Champlain Pediatrics	
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							

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.

# 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 **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.



# 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

# Sneak Peek!

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

# 10.4 Upcoming Features

10.4 release is  
scheduled for  
October 2025

## 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

# 10.4 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.

# 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: 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.

# 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



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.



# 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!