

Cultivating Your Calendar:

Self Scheduling Tips & Tricks

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This session will:



- Review basics and benefits of Patient Portal Self Scheduling
 - Provide pointers on how to prepare the digital soil
AKA **configure Categories and Visit Types**
 - Teach essential strategic pruning maintenance
AKA **limiting availability** and **setting Patient Flags**



The Basics



PCC EHR > Configuration > Scheduling > Portal Scheduling

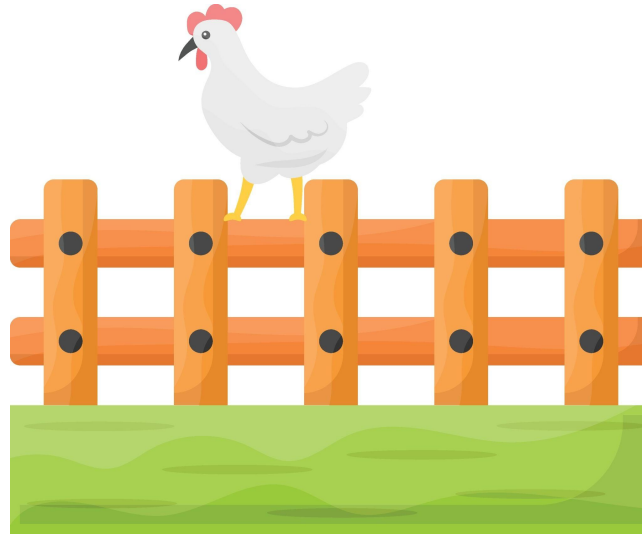
Choose which **Visit Categories**, **Visit Reasons**, **Providers**, and **Locations** are available options to Patient Portal users

Set **Search Rules**, optionally required **Appointment Notes**, **Multipatient scheduling** parameters, and **PCP requirement**

Adjust settings and toggle the feature on and off as needed

Configuration > Scheduling > Preferences

Patient Portal Scheduling uses Visit Types to determine which visit time slots to offer based on the Visit Reason selected.



Method 1

Portal schedulers are only offered slots designated with a Portal Visit Type

Requires precise Scheduling Template configuration

Allows your practice to designate specific time slots in a provider's Scheduling Template as available to Patient Portal Scheduling

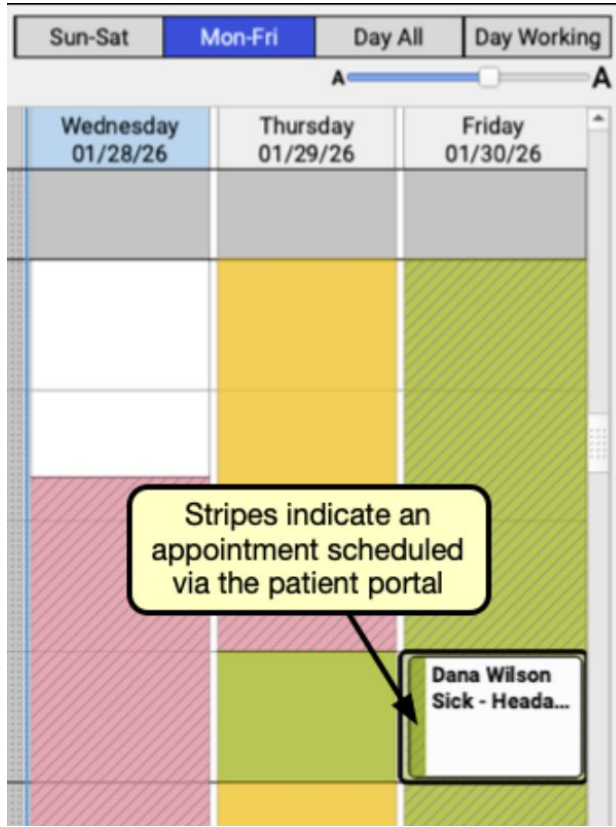
This does not prevent Appointment Book users from scheduling within those slots; it simply opens the selected time slots to the Portal Scheduling tool.

Method 1

Portal schedulers are only offered slots designated with a Portal Visit Type

Tools > Provider Hours > Scheduling Templates

Once enabled, the Visit Type menu includes a **“Portal” version** of each Visit Type for the Visit Reasons you assigned to a Portal Scheduling Category.



Select the “Portal” version of each type, and **mark time slots as available for Portal Scheduling**, as you did when setting up Scheduling Templates.

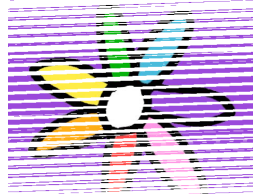
Time slots marked as portal visit types will appear with a **striped pattern** over the Visit Type color.

Method 2

Portal schedulers are offered all slots matching the color of the Visit Reason

This option maximizes the available slots. Any open time slot color coded as a Sick Visit or a Well Visit is available, provided they match the visit types, providers, and locations you specified in the Portal Scheduling tab.

This option requires Scheduling Template to have Visit Types configured but in general takes less setup time.



The method chosen will dictate the Patient Portal user experience.

Consider your patient population and your practice and what might work best for them.

Categories & Visit Reasons



Scheduling Configuration

Visit Reasons Visit Types Portal Scheduling Preferences

Portal Scheduling

Portal scheduling is restricted to the categories you choose to display and to the visit locations selected for each category. Portal users will only be offered appointment search start and stop time frames.

Categories Display

Category	Display
Sick	☐
Well	☐
Vaccine Only	☐
Other	☒

Sick ☐ Display for Portal Scheduling

Edit No Visit Reasons

Edit No Providers

☐ Require patients to schedule with Primary Care Provider

Edit No Locations

☒ Enable multipatient scheduling and limit to 2 patients

Appointment Note

Note Instruction: ny 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

Select a category to configure

Click "Display for Portal Scheduling" to make this category available for portal scheduling

If "Display for Portal Scheduling" is checked, but one or more selections have not been made, the category button turns orange

Scheduling Configuration

Visit Reasons Visit Types Portal Scheduling Preferences

Portal Scheduling

Portal scheduling is restricted to the categories you choose to display and to the visit locations selected for each category. Portal users will only be offered appointment search start and stop time frames.

Portal Scheduling: Sick - Visit Reasons

Select the Visit Reasons that Portal Schedulers should see when scheduling "Sick" appointments

Select All Select None Search Filter: sick

Include	Visit Reasons	Visit Type
☐	Extended Sick Call	Sick
☐	New Sick Call	Sick
☐	Problem	Sick
☐	Sick - Allergies	Sick
☐	Sick Call	Sick
☐	Sick Call (Cert)	Sick
☐	Sick - Ear Problems	Sick
☐	Sick - Eye Problems	Sick
☐	Sick - Headache	Sick
☐	Sick - Injury	Sick
☐	Sick - Skin Problems	Sick
☐	Telemedicine Sick	Sick
☐	Test Green/Sick 10 Minute	Sick
☐	Test Green/Sick 15 Minute	Sick
☐	Test Green/Sick 5 Minute	Sick

Categories Display Sick

Edit

☒ Enable multipatient scheduling and limit to 2 patients

Appointment Note

Note Instruction: ny 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

Cancel Save

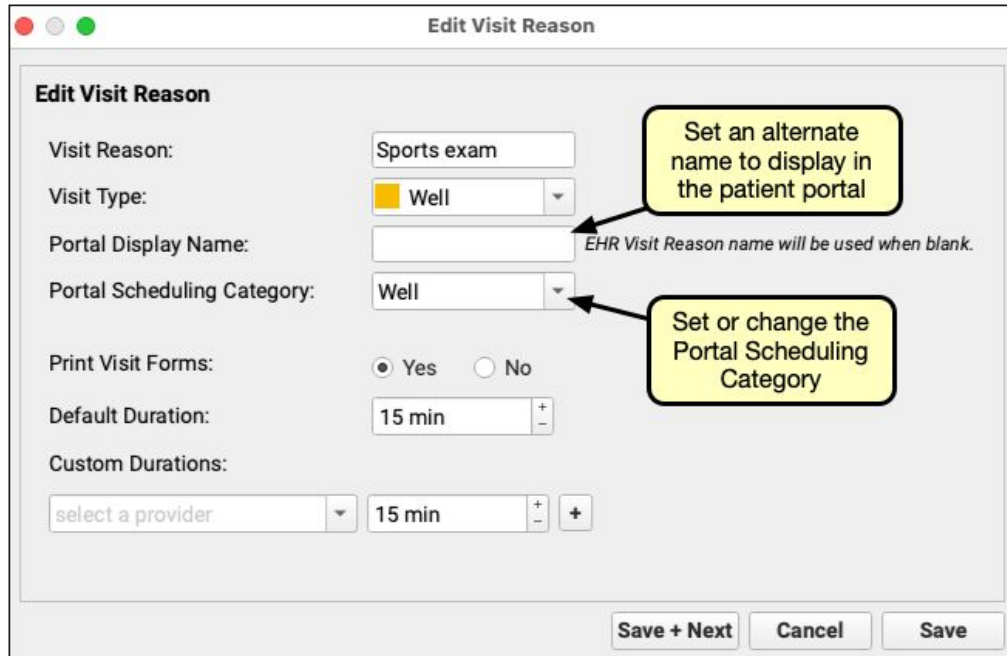
Close

Select visit reasons to include in this category

Filter visit reasons by keyword

Portal Display Name

You can set an alternative Portal Display Name to appear to Portal users instead of the Visit Reason name.



The screenshot shows a window titled "Edit Visit Reason" with the following fields and annotations:

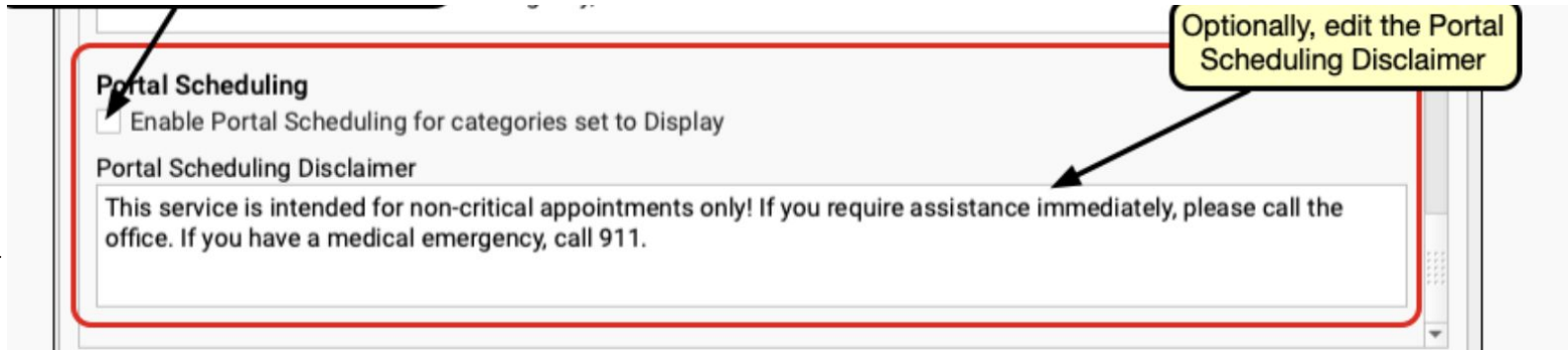
- Visit Reason:** A text field containing "Sports exam".
- Visit Type:** A dropdown menu with a yellow icon and the text "Well".
- Portal Display Name:** An empty text field. An annotation box points to it with the text "Set an alternate name to display in the patient portal". Below the field, it says "EHR Visit Reason name will be used when blank."
- Portal Scheduling Category:** A dropdown menu with the text "Well". An annotation box points to it with the text "Set or change the Portal Scheduling Category".
- Print Visit Forms:** Radio buttons for "Yes" (selected) and "No".
- Default Duration:** A text field with "15 min" and increment/decrement buttons.
- Custom Durations:** A section with a dropdown menu labeled "select a provider", a text field with "15 min", and increment/decrement buttons.

At the bottom of the window are three buttons: "Save + Next", "Cancel", and "Save".



Portal Scheduling Disclaimers

Setting a disclaimer is an important step to take when completing your configuration. It sets the tone for what your Portal users see when they schedule an appointment and reminds them of appropriate parameters for communicating with the practice.



The screenshot shows a configuration window for 'Portal Scheduling'. A red rectangular border highlights the main configuration area. A yellow callout box with a black border points to the 'Portal Scheduling Disclaimer' text area. An arrow points from the top left of the red box to the 'Enable Portal Scheduling' checkbox.

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.

Optionally, edit the Portal Scheduling Disclaimer



Appointment Notes

Similarly, setting an Appointment Note for each Category is another important step. This will prompt Portal users to provide different information depending on what you include.

Appointment Note

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

☒ Require appointment note



[Back](#)

My Kid's Chart
Appointment Scheduling

Andrew Wilson

Appointment Reason

Sick - Skin Problems

Note

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

Note is required. 0 of 100 characters



Multipatient Scheduling

By default, multipatient scheduling is enabled for each scheduling category and is set to a maximum of two patients. When available, users can select additional patients, up to the maximum set here.

Sick☐ Display for Portal Scheduling

Edit

▶ 7 Visit Reasons

Edit

▶ 9 Providers

☐ Require patients to schedule with Primary Care Provider

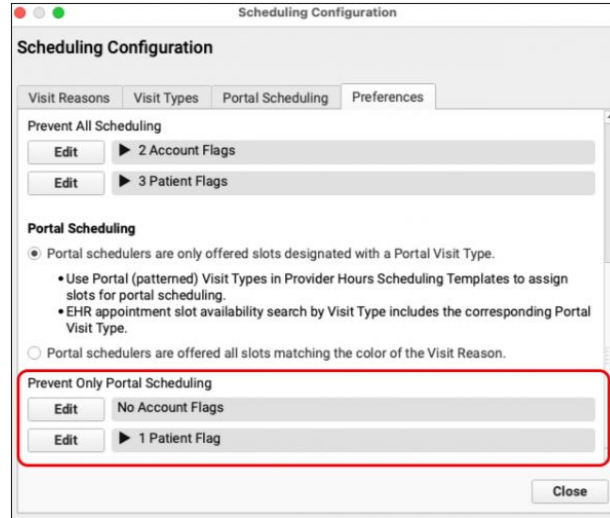
Edit

▶ 4 Locations

☒ Enable multipatient scheduling and limit to patients

Account & Patient Flags

Configuration > Scheduling > Preferences



Scheduling Configuration

Visit Reasons Visit Types Portal Scheduling Preferences

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.

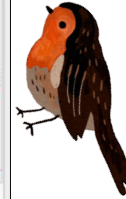
☐ Portal schedulers are offered all slots matching the color of the Visit Reason.

Prevent Only Portal Scheduling

Edit No Account Flags

Edit 1 Patient Flag

Close



Flags already checked under “Prevent All Scheduling” will not be available to select, since preventing all scheduling already prevents Patient Portal Self Scheduling.

Any Patient or Account with a flag you select here can only be scheduled through the Appointment Book. If a user attempts to schedule a patient with a flag that prevents Portal Scheduling, the patient cannot be selected and will be marked with “Please Call to Schedule”.



Client Spotlights

One Family Pediatrics

Cumming, GA

Serving over 6,000 patients



OneFamilyPediatrics



Method 1: Portal Visit Type

Sick (1 - Sick), Well (75), Vaccine (2 - Flu, Imms Only)

Scheduling Template with alternating Well and Sick Visits with spots available for Portal Scheduling

Over 400 visits scheduled via the Portal in the last year!

A glimpse at Dr. Lavania's Scheduling Template

AM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8:00 am		Portal W...	Portal W...	Portal W...	Portal W...	Portal W...	
8:10 am							
8:20 am							
8:30 am							
8:40 am							
8:50 am		One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	
9:00 am		Portal Po...	Portal Po...	Portal Po...	Portal Po...	Portal Po...	
9:10 am							
9:20 am							
9:30 am		Portal W...	Portal W...	Portal W...	Portal W...	Portal W...	
9:40 am							
9:50 am							

PM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1:20 pm							
1:30 pm		Portal W...	Portal W...	Portal W...	Portal W...	Portal W...	
1:40 pm							
1:50 pm							
2:00 pm							
2:10 pm		Portal Po...	Portal Po...	Portal Po...	Portal Po...	Portal Po...	
2:20 pm		One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	
2:30 pm		Portal W...	Portal W...	Portal W...	Portal W...		
2:40 pm							
2:50 pm						Portal W...	
3:00 pm							
3:10 pm		Portal Po...	Portal Po...	Portal Po...	Portal Po...		
3:20 pm							

A glimpse at One Family Pediatrics' Nurse Scheduling Template

AM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8:00 am		Portal Nu...	Portal Nu...	Portal Nu...	Portal Nu...	Portal Nu...	
8:10 am							
8:20 am							
8:30 am							
8:40 am							
8:50 am		One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	
9:00 am							
9:10 am							
9:20 am							
9:30 am							
9:40 am							
9:50 am							

PM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1:20 pm							
1:30 pm		Portal Nu...	Portal Nu...	Portal Nu...	Portal Nu...	Portal Nu...	
1:40 pm							
1:50 pm							
2:00 pm							
2:10 pm		One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	One Family Pediatrics	
2:20 pm							
2:30 pm							
2:40 pm							
2:50 pm							
3:00 pm						Nurse Visit	
3:10 pm							
3:20 pm							

One Family Pediatrics

Cumming, GA



OneFamilyPediatrics

Portal Scheduling Disclaimer

Portal Scheduling

☒ Enable Portal Scheduling for categories set to Display

Portal Scheduling Disclaimer

Online scheduling is intended for non-critical appointments, only. If you are experiencing a medical emergency, please call 911 immediately. If you are not sure and have questions, please call the office at 678.962.7337. If you need to reschedule or cancel an appointment, please call our office directly.

One Family Pediatrics

Cumming, GA



OneFamilyPediatrics

Prevent Only Portal Scheduling - Account & 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

▼ 6 Account Flags
Always Late/Cancel
Collection Review
Declined Credit Card on File
Do not schedule yearly well check
Missed Appointment 3
Refuses Credit Card on File

Edit

▼ 3 Patient Flags
Always Late
Inactive
New Patient

One Family Pediatrics

Cumming, GA



OneFamilyPediatrics

"It has helped reduce our Monday morning messages and calls by allowing people to self-schedule over the weekend. Majority of the self-schedules are sick visits...it's nice to have patients just pick their time and provider without having to call or portal message us."

 Dr. Hiral
Lavania

Mid City Pediatrics

Shreveport, LA

Serving over 30,000 patients



Method 1: Portal Visit Type

Sick (1 - Fast Lane)

Fast Lane Provider 1-5 w/ corresponding Scheduling Template

Over 7,000 visits scheduled via the Portal in the last year!



A glimpse at Mid City Pediatrics' Fast Lane Scheduling Template

AM

Visit Type:	FAST LANE							Clear Visit Types
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
8:00 am		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	
8:15 am		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	
8:30 am								
8:45 am								
9:00 am		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	
9:15 am		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	
9:30 am								
9:45 am								
		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	

PM

Visit Type:	FAST LANE							Clear Visit Types
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
12:45 pm								
1:00 pm		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...		
1:15 pm								
1:30 pm								
1:45 pm								
2:00 pm		Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...	Portal FAST...		
2:15 pm		Portal FAST...		Portal FAST...	Portal FAST...	Portal FAST...		
2:30 pm								
2:45 pm								

As visits are scheduled, staff moves patients over to the Provider(s) covering Fast Lane

Mid City Pediatrics

Shreveport, LA



Portal Scheduling Disclaimer

Portal Scheduling

☒ Enable Portal Scheduling for categories set to Display

Portal Scheduling Disclaimer

Please note: Fast Lane appointments are intended for recent symptoms (ex. sore throat, cough, fever, congestion, wheezing). It is not intended for follow-up appointments or chronic issues lasting more than 1 - 2 weeks (ex. back pain for 6 months, headache for 1 month). Please call our office to schedule a visit to ensure enough time is allotted to address these issues. For emergencies, please call 011

Franklin Pediatrics, P.C.

Franklin, PA

Serving over 3,000 patients



Ziora of "Ziora's Quest: Mommy's Milk Rocks" by Dr. Nnamani

Method 2: Portal Visit Type

Sick (19), Well (61), Vaccine (1), Other (19)

Scheduling Template with varying Visit Types between Categories

Over 100 visits scheduled via the Portal in the last year!



A glimpse at Dr. Nnamani's Scheduling Template

AM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8:00 am					Sick		
8:10 am					Sick		
8:20 am					Well Visit PE		
8:30 am				Asthma	Well Visit PE		
8:40 am				Asthma	Well Visit E...		
8:50 am				Well Visit E...	Well Visit E...		
9:00 am		Sick		Well Visit E...	New Patient		
9:10 am		Sick		Well Visit PE	New Patient		
9:20 am		Well Visit E...		Well Visit PE	Sick		
9:30 am		Well Visit E...		Sick	Sick		
9:40 am		Well Visit E...		Sick	New Patient		
9:50 am		Well Visit E...		New Patient	New Patient		
		Well Visit PE	Well Visit PE	New Patient	Well Visit PE		

PM

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1:20 pm							
1:30 pm				Well Visit PE			
1:40 pm				Well Visit PE			
1:50 pm				Well Visit E...			
2:00 pm		Well Visit PE	Well Visit E...	Well Visit E...			
2:10 pm		Well Visit PE	Well Visit E...	Well Visit PE			
2:20 pm		Well Visit PE	Well Visit E...	Well Visit PE			
2:30 pm		Well Visit PE	Well Visit E...	Well Visit E...			
2:40 pm		Well Visit E...	Well Visit PE	Well Visit E...			
2:50 pm		Well Visit E...	Well Visit PE	Chronic			
3:00 pm		Well Visit E...	Well Visit PE	Chronic			
3:10 pm		Well Visit E...	Well Visit PE	Well Visit PE			
3:20 pm		Chronic	Chronic	Well Visit PE			

Franklin Pediatrics, P.C.

Franklin, PA



Ziora of "Ziora's Quest: Mommy's Milk Rocks" by Dr. Nnamani

Portal Scheduling Disclaimer

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.

Would any other practices like to briefly share your current setup or primary goals?



Data-Driven Adjustments

Configuration > Protocols > Chart-wide Builders



Adjust Components and their order to ensure that Patient Portal users are being reviewed, confirmed, and added during Scheduling and Patient Check-In

Data-Driven Adjustments

Reports > Report Library > Appointments by Scheduling User Report

Review which appointments were self scheduled

Appointments by Scheduling User		
Review appointments scheduled yesterday, grouped by the user who scheduled		
Appointments / Blocks: Appointments Only		
Appointment Creation Date: From 03/18/2026 to 03/18/2026		
Appointment Scheduling Method: Portal		
Columns: 7 Displayed		Group By:
Appointment Time	Appointment Scheduling Method	Appointment Provider
Portal User (4 results)		
4:45pm	Portal	Kathleen W. Gomez, M.D.
4:45pm	Portal	Kathleen W. Gomez, M.D.
10:30am	Portal	Fred Jones, M.D.
7:45pm	Portal	Flu



The Benefits



Provides Customized Control

reducing administrative friction

Reduces Inbound Calls and Manual Tasks

balancing workload for staff

Increases Convenience

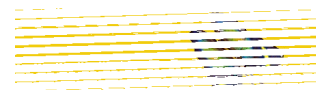
Providing scheduling freedom to patients and families

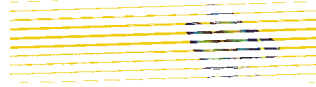
Looking Ahead

Here are some Enhancement Requests or Wishes ✨ that we've received:

- Alert system for staff when a Portal user self schedules
- Automatically add extra time for patients with certain flags
- Ability to self schedule multiple siblings at once
- Ability for parent/guardian of privacy-enabled patient to self schedule

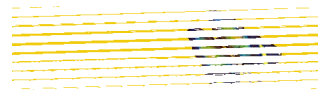
PCC wants your feedback!





What can PCC design next to bridge the gap between practice needs and parent expectations?

Where can I learn more?



Email your Client Advocate (CA)!

Not sure who your CA is? Email support@pcc.com

Check out PCC Learn!

learn.pcc.com

search: self scheduling



References & Resources

All PCC Resources: <https://www.learn.pcc.com>

Slides 1, 4-6, 8-16, 35-37: Google Slides - Stock & Web

Slides 17, 20-22: <https://onefamilypediatrics.com/>

Slides 23, 25-26: <https://midcityped.com/>

Slides 27, 29-30: <https://www.dramakannamani.com/>