



Patient Portal Self-Scheduling

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Session Objectives

1. Understand how to set up 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





Let's Get Started!



1. Configure your visit categories
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

A screenshot of the 'Visit Reason Configuration' window. The 'Edit Visit Reason' sub-window is open, showing fields for 'Visit Reason' (Acute Visit), 'Visit Type' (Sick), 'Portal Display Name' (Sick Visit), and 'Portal Scheduling Category' (not enabled). The 'Portal Display Name' field is highlighted with a red rectangle. Below these fields are options for 'Print Visit Forms' (Yes/No), 'Default Duration' (15 min), and a list of 'Custom Durations' for various providers. At the bottom of the sub-window are 'Save + Next', 'Cancel', and 'Save' buttons. The main window has tabs for 'Visit Reasons', 'Visit Types', 'Portal Scheduling', and 'Preferences'. On the left, there are buttons for '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

Portal Scheduling: Option #1

Provider Hours

Provider Schedule | Scheduling Templates

Edit Scheduling Template

Template Name: Regular - Dr. Casey

Clear Hours

	Start Time	End Time	Location	
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	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							

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:

Visit Type:

Clear Hours

	Start Time	End Time	Location	Clear Hours
Monday:	8:00am	to 6:00pm	Lake Champlain	+
Tuesday:	8:00am	to 6:00pm	Lake Champlain	+
Wednesday:	8:00am	to 6:00pm	Lake Champlain	+
Thursday:	8:00am	to 6:00pm	Lake Champlain	+
Friday:	8:00am	to 6:00pm	Lake Champlain	+
Saturday:		to		+
Sunday:		to		+

Clear Visit Types

	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							



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 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

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My Kid's Chart
Appointment Scheduling

Krista "Krissy" Joseph Hetrick, III

Appointment Reason

Choose a reason

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

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My Kid's Chart
Appointment Scheduling

Scheduling Preferences:

Appointment Provider

Any provider

Appointment Location

Any location

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
- Modify the Appointment Scheduling Method criteria to 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 01/22/2026 to 04/22/2026
Appointment Scheduling Method: Portal

Columns: 11 Displayed Group By: Appointment Scheduling User Search Filter:

:: Appointment Date ▲	:: Appointment Time ▲	:: Appointment Duration	:: Appointment Scheduling Method	:: Appointment Provider	:: Appointment Location	:: Appointment Reason
▼ (3 results)						
02/18/2026	10:30am	15	Portal	Office	Burlington Peds - Flu Clinic	Sick Call
04/18/2026	11:15am	15	Portal	Beverly Crusher, MD	Winooski Pediatrics	4yr Well Visit
04/18/2026	12:30pm	15	Portal	Beverly Crusher, MD	Winooski Pediatrics	2mo Well Visit

3 Results

Report Library Open Chart Schedule Report Export Back Print

Resources

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

- [Portal Self Scheduling & Configuration](#)
- [Portal Self-Scheduling Weblab Trainings](#)





Wrap-up

Get started in four easy steps!

1. Configure your visit categories
2. Set your scheduling preferences
3. Update your scheduling templates
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Asking Questions:

Virtual attendees: Use the chat if you have a question that you want answered

In-person attendees: Go to the stationary microphone in your room.

CEUs:

You can request CEU codes for qualifying sessions using the form PCC shares out at the conclusion of the conference.

Do you have any questions?





**Please complete the course
survey in the UC App.**

