



Why the Patient Portal Matters to Help Your Practice Thrive (and How We Achieved 100% Usage)

Steven F. Hirsch, MD, FAAP
www.HirschPediatrics.com





Who are we?



Hirsch Pediatrics is a proudly independent practice with 3 (soon to be 4) full-time providers, established in 2007.

We are happy PCC clients since 2021.

We have co-located mental health and lactation support.

We are Patient Portal enthusiasts!





Our office





“Building Pediatrics on Purpose”**

from “Charting the Future” Chip Hart podcast June 2026

- *Creating workflows that prioritize preventive care, patient convenience, and physician well-being.*
- *Dr. Hirsch makes a compelling case that **thoughtful design of spaces, systems, and relationships** can improve both the patient experience and the sustainability of pediatric care.*

The Hirsch Pediatrics practice philosophy is
“Don’t get mad, get EFFICIENT!”





Efficient Patient Portal Usage Can Improve Everything!

Using the Patient Portal well allows us to...

- spend more time with the families at their appointments,
- have more down time or extra time to complete other tasks,
- reduce sick visits to open up schedule space for check-ups,
- and improve financial stability!





Three Part Discussion

1. Why we LOVE the Patient Portal
1. How do we ensure 100% of our families use the Patient Portal
1. How we configure our Patient Portal templates and use efficient workflows to respond to Patient Portal medical questions





Why we LOVE the Patient Portal?

Let me count the (21) ways!





Reason # 1

Very simple family interface

- Designed for primary care pediatrics
- One login/password for each user to access every family member
- When used properly by the office your families will find the Patient Portal far easier and more convenient than a phone call.
 - Like Uber and Amazon

Reason # 2

Better time management with messages



- When the portal message is sent you are done with documentation!
- Unlike phone call documentation that often requires more documentation later in the day.

Reason # 3 **Read receipt**



- Read receipt on the portal message avoids “never received the call” patient comments.
- Office can easily set “Follow Up On Unread Message” task to ensure portal message is read.
- Important for lab/radiology results, time sensitive requests, or any message that needs a response.

Reason # 4

Families write your HPI



- For sick visits requested by Patient Portal the family writes out the history which we copy/paste:
 - “Portal message per parent 07/15: . . .”
- Knowing HPI BEFORE the appointment helps you triage better to plan appropriate scheduling and length of sick visit.

Reason # 5

Maintain office operations remotely with secure connect and pocket PCC



Using the Patient Portal for the vast majority of office communications ensures your office and patient care will still flow seamlessly during . . .

- Support staff unplanned absences (again)
- Your phones are not working (again)
- Weather cancellations

Reason # 6

Difficult family communications



For difficult or divorced families your documentation is meticulous and straightforward without hearsay.

We always ask upset parents to send a portal message with concerns so we can give a thoughtful, calm, and detailed response.

Reason # 7

Better in-person customer service



When your phones ring much less because your families are using the Patient Portal instead then you can better manage your in-person families.

**** Customer service reminder: The family in front of you is more “important” than the family on the phone.**

Reason # 8

Improve your quality measures for overdue check-ups/vaccines



- Send portal message for overdue appointments: check-ups and vaccines.
- Renew task every 1-2 weeks until appointment is scheduled.
- HR: Can track employee follow-up communications and ensure documentation of phone calls if messages not read.

Reason # 9

After-hours access to patient messages



Optional suggestions for practices that want to “secretly” review messages after-hours (especially with **pocketPCC**)

Why do this?

You will exceed patient expectations!

You can prevent late evening or overnight after-hours calls!

You can minimize early morning office chaos!

Reason # 10

Document and form management



Patient Portal provides secure, reliable, and HIPAA compliant management of documents and forms.

- Avoid e-mail risk of sending to wrong family or getting hacked (which is a nightmare).
- Faxes are secure but clunky.

**** Our policy is to always send documents and forms to families directly through the portal including records request of patient or specialist.****

Reason # 11

Pictures and images



Patient Portal provides secure, reliable, and HIPAA compliant management of pictures.

- View rashes and other patient pictures
- Updated insurance cards

**** For videos request Google drive link with shared access.**

Reason # 12

Sending patient letters



Using PCC forms tool with your Patient Portal for your patient letters/notes is a super simple and efficient system.

- Design your office form with official letterhead.
- Providers can have individual forms and include signatures.



Steven F. Hirsch, MD, FAAP
Gloribel L. Olexa, MD, FAAP
Kristina A. Kissiova, MD, FAAP
Diana Kochan, LMFT

Date: 06/18/26

Patient Name: John CHADIS_test Canning

Date of Birth: 05/01/12

To Whom it May Concern:

The aforementioned is a patient in our office. FREE TEXT TYPE HERE

Sincerely,

Hirsch Pediatrics

Hirsch Pediatrics, LLC
15235 Shady Grove Road, Suite 105
Rockville, MD 20850

301-990-3030 phone
301-990-6767 fax
www.HirschPediatrics.com



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Steven F. Hirsch, M.D.
Steven F. Hirsch, MD, FAAP
Board Certified Pediatrician
NPI 1790759389
DEA BH8252455

Hirsch Pediatrics, LLC
15235 Shady Grove Road, Suite 105
Rockville, MD 20850

301-990-3030 phone
301-990-6767 fax
www.HirschPediatrics.com



Reason # 13

Teenager communications **



- Confidential in the Patient Portal since only the user logging in can view the portal messages sent to or from that user.
- Read receipt can verify teenager viewed message.
- Helpful for teenage lab updates and other follow-up confidential issues

** Need to ensure all teenagers are portal active.

Reason # 14

Draft portal messages are autosaved as tasks



- Unsent messages are saved as draft portal messages so you do not forget to send message.
- Avoids message that were created but inadvertently never sent.

Reason # 15 **CHADIS**



- CHADIS surveys seamlessly **auto-assigned** to portal account.
- CHADIS responses are then easily added to patient chart.
- Also can easily assign additional CHADIS surveys through CHADIS website.

Reason # 16

Billing management

Use Patient Portal for insurance verification



- **Inactive insurance**
 - **(.ins)** Hello. The insurance policy we have on file for you is currently inactive. Please send over a picture of the front and back of your new insurance card so we can update your information. If you are currently without insurance please call the office for assistance. Thank you.
- **Newborns not added to insurance**
 - **(.n)** new baby not added to insurance
 - **(.newb)** Hello – we wanted to let you know that as of today your insurance does not show the new baby has been added to your policy. Please contact your insurance as soon as possible. Thank you for allowing us to take care of your family and for helping us keep our accounts up to date!

Reason # 17

Billing management

Use Patient Portal to manage patient balances (with CCOF)



- **(.ccofs)** New account balance – payment will be automatically charged to your credit card on file
- **(.ccof)** Please see attached your current account balance statement. No payment is due now as your credit card on file will be automatically charged in 14 days. Please notify us within 14 days of the date of your statement if you have any questions about your account balance.

This balance reflects any outstanding charges, co-pays, or deductibles after all applicable charges have been filed and processed by your insurer, and the insurance covered portion of the claim has been paid.

Thank you for helping us streamline our balance collection process so we can focus our time and energy on your family's healthcare!

**** Billing statements sent by Patient Portal are very easy for support team and receptionist to view the history and track communications without going elsewhere in PCC or running reports.**

Reason # 18

Patient Portal prescription refills



PCC eRX works great! Use it every time with the Patient Portal!

- We only fill prescriptions through a PCC encounter instead of faxes or phone calls.
- Cancel and resending prescriptions with PCC eRX works well.
- Reduces miscommunication and ensures prescription accuracy.

**** When done efficiently and effectively this will set your practice apart by exceeding expectations, improve office workflows, and reduce staff usage and burnout.**

Reason # 19

Referral requests



- Efficiently send families your list of referral locations
 - Set up Word document to cut and paste referral lists
- Consider also sending copies of the referral document directly to family so they have it available when needed.

Reason # 20

Adding office tasks to Patient Portal messages



Many uses including:

- Appointment requests task the scheduler
- Future lab or vaccine appointments add future follow-up task
- FYI other providers in office.
- Many more!



Reason # 21

**** Use Patient Portal to respond to triage and other medical questions ****

When done efficiently and effectively this will set your practice apart by exceeding patient expectations, dramatically improve office workflows, and reduce staff usage and staff burnout!

And Many Other Reasons!!!



Patient Portal features not currently being used by our office but may be very helpful for your office:

- Payment of balances
- Pre-check-in
- Self-scheduling
- Anything else from the audience?



So how do you get your families to use the Patient Portal?

Step 1 - BELIEVE

Step 2 - SET-UP

Step 3 - IMPLEMENT





So how do you get your families to use the Patient Portal?

Step 1 - BELIEVE

- Believe that your families almost always prefer **reliable** digital communication over phone calls!
- Believe that your practice success and stability will be enhanced by embracing the Patient Portal.
- Then be willing to adjust your workflows and responsibilities to support the Patient Portal!





So how do you get your families to use the Patient Portal?

Step 2 - SET-UP

- Ensure active Patient Portal accounts at or before the first appointment. (Newborn families love having access before the first appointment.)
- **Make it very easy for patients** to use the Patient Portal with simple and intuitive templates.
- **Make it very easy for office** to respond to Patient Portal messages with efficient workflows.





So how do you get your families to use the Patient Portal?

Step 3 - IMPLEMENT

- Politely request that all medical questions or possible appointment requests go through the portal to “get a faster response” and so the “doctor can take a look.”
- Then when the message comes through have a system to respond promptly and **exceed expectations** (which fortunately is a low bar)!
- Note: If appointment is already scheduled over the phone you can still ask the family to send a portal message with additional information and concerns.





So how do you get your families to use the Patient Portal?

PART 3 - IMPLEMENT

- Do not allow or reply to e-mails regarding medical questions, forms, and documents.
- When forms and documents are completed always return to family through the Patient Portal.





How to setup your Patient Portal templates?

- Keep it simple and avoid clutter (like PCC)!
- Simple and reliable Patient Portal will be used extensively by your families and build Patient Portal loyalty.



Patient Portal Templates

Our Patient Portal configuration

(8 templates)

- Billing/Insurance
- Doctor Question or Appointment Request
- Form Completion Request
- Medication Refill Request
- Other Messages
- Therapy Appointment Request
- URGENT SAME-DAY Appointment Request
- Vaccine Appointment request

Note: Templates can be assigned to certain users or left unassigned.



Patient Portal Templates

Doctor Question or Appointment Request & URGENT SAME-DAY Appointment Request

- Please tell us your concerns and select your appointment preference:
- Appointment request and preferred appointment window(s) if applicable: [select one]
 - No appointment needed
 - Not sure if needs appointment
 - Requesting appointment (select options below)
- Select option(s): [select multiple]
 - Appointment today
 - Appointment different day (specify above preferred day of the week)
 - Early morning (8:00 AM - 10:30 AM)
 - Late morning (10:45 AM - 12:30 PM)
 - Early afternoon (2:00 PM - 3:30 PM)
 - Late afternoon (after 3:30 PM)
- [Allow Attachments]



Patient Portal Templates

Medication Refill Request

- Medication to Refill [Display check-box of active medications]
- Preferred pharmacy (Name and Address):
- Comments:



Patient Portal Templates

Form Completion Request

- Step 1) Parents - BEFORE uploading your forms please complete the parent sections including your child's medical information.
Step 2) Upload your completed forms as a single PDF file (PREFERRED) or as individual pictures of each page.
Step 3) When ready we will upload your completed form to your portal and send you a message. Hirsch Pediatrics strives to complete most camp/school forms in 2-3 days.
- Comments:
- [Allow Attachments]



Patient Portal Templates

Vaccine Appointment Request

- Please tell us what vaccines you need and your preferred appointment time/date.
- Comments:



Patient Portal

Responding to medical questions

Reason 1:

Why use the Patient Portal for “free” triage advice?

Responding quickly to patient messages builds patient happiness and loyalty that **exceeds expectations.**

Paradox of the patient experience:
waiting on phone hold vs
waiting for a portal message response



Patient Portal

Responding to medical questions

Reason 2:

Why use the Patient Portal for “free” triage advice?

- Your SICK VISIT : WCE RATIO is one of five components of your **Clinical Pulse** monthly dashboard report.
- Lower ratio (less sick visits) gives you a higher score and using your Patient Portal for extensive triage advice is one of the primary drivers of lowering your ratio.



Patient Portal

Responding to medical questions

Reason 3:

Why we use the Patient Portal for “free” triage advice?

- Because . . .
 - More “free” advice means **less sick visits**
 - Less sick visits means **more availability for check-ups** (review monthly dashboard for overdue check-ups) and **more comprehensive check-ups**
 - Which leads to **better long-term financial stability when “stuff” happens!!!**



Patient Portal

Responding to medical questions

- We have honed our system to efficiently and comprehensively respond to most medical questions with **much faster and more detailed responses than phone triage.**
- System can be **used anytime by anybody** in the office
 - Either doctor responds directly between patients or
 - Triage nurse can respond (optional comment “I checked with Dr. Jones, and she said . . .”)
- Use copy/paste of **templated messages** in Word document! Use it a lot!
- Use **snap text** for common words: .p = prescription; appt = appointment



Patient Portal

Responding to medical questions

Include Patient Portal message disclaimer:

“The Patient Portal is only checked during regular business hours and is not for urgent concerns. For after-hours or urgent concerns please call the office main number to reach the doctor directly. If you have a medical emergency, call 911.”



Patient Portal

Responding to medical questions

- Create Word document with two column table:
 - Left column alphabetized listing of topics in ALL CAPS
 - Right column responses to copy/paste
- Use ctrl-f (find) feature to locate the topic in the “result” list with ALL CAPS.
- Any response that may be repeated just add quickly to document.
- Make document sharable in practice (shared Google drive)



Patient Portal

Responding to medical questions

VIRAL EXANTHEM	The rash looks like a typical "viral exanthem" which is a common rash that toddlers get after having a fever. The rash has little red bumps without any blisters or scabbing. The rash is not contagious and will improve in the next 2-3 days without any treatments . I would follow up in the office if the rash is not getting better in the next few days or you still have concerns.
VIRUSES/VIRAL ILLNESS/FLU	It sounds like these symptoms are from one of the viruses going around. You usually do not need to come in for now as long as she overall looks well between the fever spikes, and you can manage the symptoms with ibuprofen, rest, and plenty of fluids. The fever may last up to 3-4 days. I copied a link below to my fever handout. I would schedule an appointment if you notice any trouble breathing, worsening fussiness/pain/lethargy, persistent fever, no urine output in 10-12 hours, or if you still have any concerns. https://hirschpediatrics.com/dr-hirsch-medical-advice/
VOMITING	Most likely the vomiting is from a stomach bug that is going around. Sometimes the vomiting can linger for up to 5-7 days though often it improves sooner. If it is from a stomach bug you may also notice some fussiness, diarrhea, and fever. We have a very detailed handout on vomiting (see link below) which has specific instructions on how to push fluids to prevent dehydration and when you need an appointment. https://hirschpediatrics.com/dr-hirsch-medical-advice/



Navigation



viral



Result 7 of 9



Headings Pages Results

DAYCARE RETURN NOTE **VIRAL** ILLNESS

XXXX is recovering from a recent **viral** illness. She may return to daycare on XXXX as long as she

Sometimes after a recent **viral** illness children can have a "post-viral gastritis" which causes

viral illness children can have a "post-**viral** gastritis" which causes persistent stomach

in children and are usually due to a recent **viral** illness (even if they had no other obvious

contagiosum" bumps which are caused by a **viral** infection that causes a mild skin rash. See

VIRAL EXANTHEM

The rash looks like a typical "**viral** exanthem" which is a common rash that toddlers get after

VIRUSES/**VIRAL** ILLNESS/FLU



Patient Portal

Responding to medical questions

A1C ELEVATION

ACNE

ADD MEDICATION SHORTAGES

ALLERGIES

AMOXICILLIN RASH

AUTISM LEUCOVORIN

AUTISM TESTING ADOLESCENT

BACK SWEATING INFANT

BACTRIM PROPYHLAXIS DOSAGE

BEDWETTING OLDER CHILD

BEHAVIOR DIFFICULTIES – 3 AND OLDER

BEHAVIORS DIFFICULTIES – 1-2 YEAR OLD

BEHAVIOR DIFFICULTIES - TODDLER TANTRUMS}

BEHAVIOR – TODDLER FUSSY BEHAVIORS HEAD BANGING

BEHAVIOR TODDLER HITTING/BITING

BLOCKED TEAR DUCT



Patient Portal

Responding to medical questions

BLOOD TYPE
BOTTLE REFUSAL
BREAST PUMP ADVICE
BURN
CHEEK RASH
CHEST PAIN
CHLAMYDIA POSITIVE
COLD SYMPTOMS
COLIC
COMPLAINT – APPOINTMENT CHARGE
CONJUNCTIVITIS
CONSTIPATION OR DECREASED STOOLS INFANT
COVID POSITIVE CHILD
COVID VACCINE HESITANCY
COW MILK TODDLER
CRADLE CAP/SEBORRHEA
CREDIT CARD ON FILE PATIENT COMPLAINT



Patient Portal

Responding to medical questions

CROUP
DAYCARE RETURN NOTE VIRAL ILLNESS
DIAPER RASH
DIARRHEA
DIVORCE/SEPARATION APPOINTMENT NOTIFICATION REQUEST
DNKA FEE PATIENT COMPLAINT
DNKA /MISSED APPT POSSIBLE DISCHARGE FROM PRACTICE
DOG BITE
EAR PAIN
EARRING INFECTION
EAR TUGGING
ECZEMA
ENURESIS/URINE AND STOOL ACCIDENTS
EYE BLINKING
FEEDING REFUSAL INFANT BOTTLES
FLAT FEET
FOOD ALLERGY BABY DIET CHANGES



Patient Portal

Responding to medical questions

FORMULA HEAVY METAL CONCERNS

FREQUENT URINATION

GASTRITIS

GOOGLE DRIVE INSTRUCTIONS

GROWING PAINS

HAIR LOSS

HAND FOOT MOUTH

HEAD BANGING

HEAD INJURY

HIGH ALTITUDE TRAVEL

HIVES

IMPETIGO

INGROWN NAIL/ PARONYCHIA

INFANT FEEDING/FUSSINESS ISSUES

INSECT BITE EAR SWELLING OR EYE SWELLING

INSECT REPELLANT

IRON DEFICIENCY ANEMIA



Patient Portal

Responding to medical questions

JUVENILE PLANTAR DERMATOSIS

KERATOSIS PILARIS

LAB REQUEST FROM NON-PROVIDER

LAB TEST RESULTS

LACTATION VISIT PAYMENT

LICE

MALARIA PROPHYLAXIS

MEDICATION ADMIN FORM

MMR EXTRA VACCINE DOSE/MEASLES OUTBREAK

MOLLUSCUM

MONKEYPOX

MOTION/CAR SICKNESS

MULTIVITAMIN

NEWBORN ACNE

NEWMAN'S APNO

NON-PATIENT JOIN PRACTICE REQUEST

NOSE BLEEDS



Patient Portal

Responding to medical questions

JUVENILE PLANTAR DERMATOSIS

KERATOSIS PILARIS

LAB REQUEST FROM NON-PROVIDER

LAB TEST RESULTS

LACTATION VISIT PAYMENT

LICE

MALARIA PROPHYLAXIS

MEDICATION ADMIN FORM

MMR EXTRA VACCINE DOSE/MEASLES OUTBREAK

MOLLUSCUM

MONKEYPOX

MOTION/CAR SICKNESS

MULTIVITAMIN

NEWBORN ACNE

NEWMAN'S APNO

NON-PATIENT JOIN PRACTICE REQUEST

NOSE BLEEDS



Patient Portal

Responding to medical questions

OVERSEAS TRAVEL
PARENT REQUEST LAB SCREENING TESTS
PAXLOVID
PERI-ORAL DERMATITIS
PHOTOSCREENING UPDATED RESULTS
PIERCING EARS
PINWORMS
PLAGIOCEPHALY/ FLAT HEAD
PLANTAR WART
PORTAL NORMAL RESULT MESSAGE
POTTY REGRESSION
POTTY TRAINING
REFLUX PRECAUTIONS
SCHOOL/BEHAVIOR CONCERNS
SLEEP NIGHT TERRORS
SLEEP WALKING
SLEEP ROUTINE 4 YEAR OLDS



Patient Portal

Responding to medical questions

SLEEP TRAINING

STUTTERING

STYE

SWIMMER'S EAR

TAMIFLU/INFLUENZA/FLU

TELEMED INTRO

TICK BITES

TONGUE TIE – POSTERIOR

TORTICOLLIS NEWBORN

TORTICOLLIS OLDER CHILD

UMBILICAL GRANULOMA

UMBILICAL HERNIA

VACCINE ALUMINUM RESOURCES

VACCINE LOCALIZED REACTION

VACCINE REFUSAL – NO VACCINES GIVEN INFANT

VACCINE REFUSAL – OLDER CHILD

VIRAL EXANTHEM



Patient Portal

Responding to medical questions

VIRUSES/VIRAL ILLNESS/FLU
VOMITING
VOMITING AND DIARRHEA



Patient Portal

Responding to medical questions

Pink eye:

Yes this does sound like pink eye. I will send in a prescription to your pharmacy for Polytrim eye drops in case they are needed though fortunately most cases of pink eye are from viruses and the eye symptoms resolve on their own in 3-4 days without treatment. Here is a link to my handout on pink eye/conjunctivitis which has a lot of information on when to start the drops, how to give them, when you can go back to daycare/school, and other information. You can also treat any fever/fussiness with ibuprofen.

<https://hirschpediatrics.com/medical-advice>



Patient Portal

Responding to medical questions

Head injury:

Fortunately most head injuries are minor and can be observed at home. For the next several hours you can apply a cool pack to any bump since this will reduce the swelling. It is okay to do normal nap and sleep schedules. (Note sometimes right after the injury if the child is very emotional they may get sleepy and take a nap which is okay as long as while sleeping they look comfortable with normal breathing and color.) The main symptoms to watch out for several hours after the injury include persistent vomiting, worsening headaches or dizziness, and swelling that continues to get worse. If you notice any of these symptoms or had any loss of consciousness then I would refer you directly to the urgent care/ER. Our website head injury handout also has some additional helpful tips.

<https://hirschpediatrics.com/head-injury-for-infants-and-toddlers-medical-advice/>



Patient Portal

Responding to medical questions

Cold symptoms:

It sounds like he has caught one of the colds going around. Sometimes the symptoms can last up to 10-14 days though any fever typically lasts only 3-4 days. Usually you can manage the symptoms at home. I copied a link below to my “cold” handout which has a lot of suggestions on how you can treat the symptoms, what to expect with the cold, as well as when you need to be seen.

<https://hirschpediatrics.com/dr-hirsch-medical-advice/>



Patient Portal

Responding to Medical Questions

Pearls and Pitfalls

- You can customize the name of the office portal message respondent so it is not the user name.
- When occasional portal message from family is sent in the wrong sibling chart or message about multiple siblings in one chart then copy and paste to correct chart with multiple responses if needed.
- Back and forth 3 messages then schedule an appointment.
 - “If you still have any questions or concerns then we can schedule an appointment at your earliest convenience.”



Patient Portal

Responding to Medical Questions

Pearls and Pitfalls

- Patients that “demand” a non-urgent phone call may get an end of the day call whereas portal messages are responded to throughout the day.
- Patient Portal is a great way to check on patients:
 - ongoing medical issues and hospitalized (“checking on XXXX”)
 - may need additional lactation or mental health appointments



In summary the Patient Portal is ideal for practices. . .

- Who find themselves overscheduled way too often
- Who want to achieve better quality measures
- Who want to reduce staff and physician burnout
- Who want to set your practice apart
- Who want to practice “Pediatrics on Purpose”





Thank you!



**Your questions and
comments are welcome.**

