# Provider Portal Scheduling – Community Practice Workflow

A service offered by Stamford Health Scheduling
Supported through R1

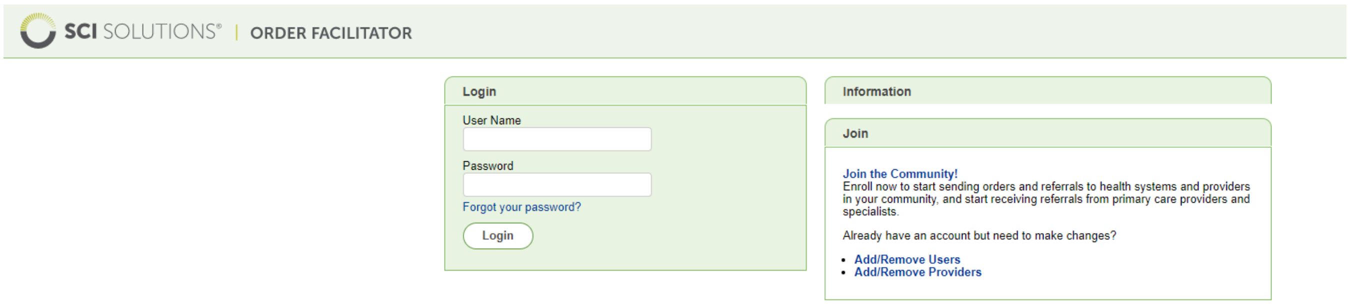
Last Updated: 6/28/21 by Gregorio Santa

# Logging In

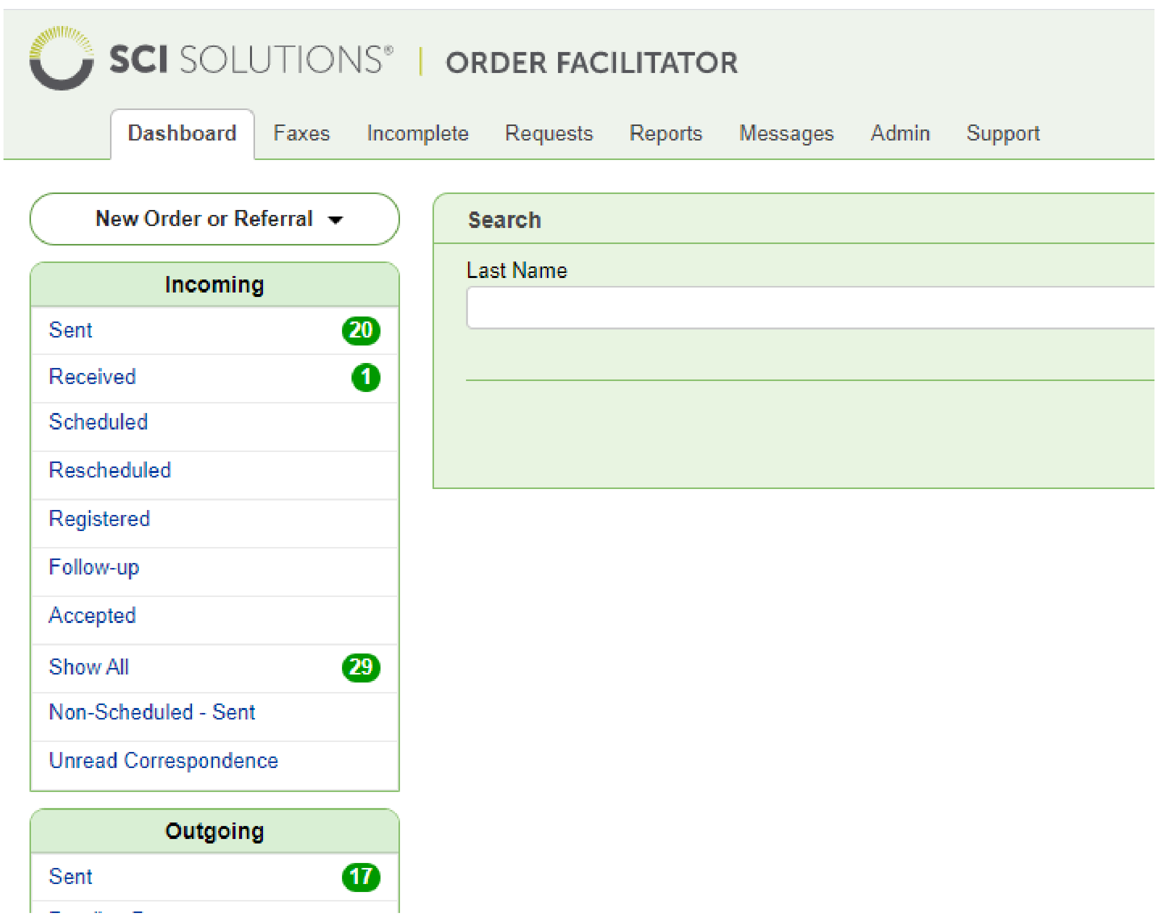
Community Practices utilize Order Facilitator and Provider Portal to input their own orders and schedule appointments for their patients.

For reference the web address is: https://asp.orderfacilitator.com/of01/

Below is an image of the main screen where users will sign in.



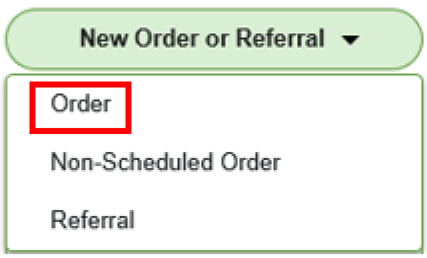

After logging in, the system defaults to the dashboard. The dashboard is used to enter new orders, view existing orders, and/or book appointments using orders. Provider Portal can be launched directly from the order being used to schedule an appointment.



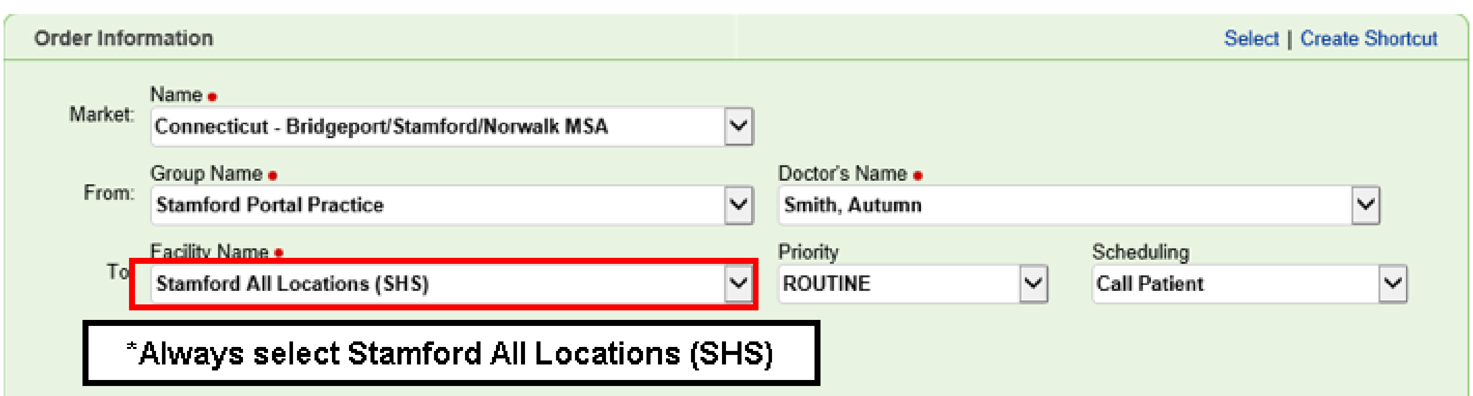
# Entering an Order

To create a new order, select the **New Order or Referral** dropdown and click on **Order**.


Click on **Order** to start creating the patient order.

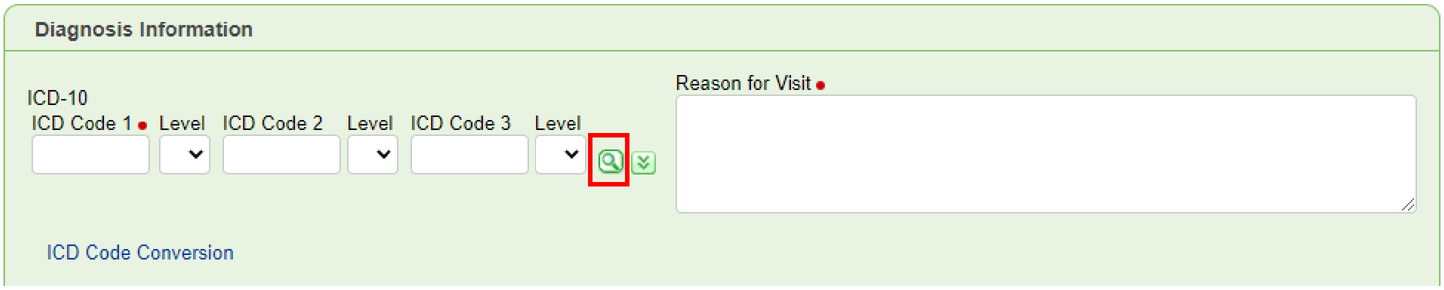



Using the dropdowns, complete all required fields marked with a red asterisk *. The Group Name field will default to your practice. Select the correct provider if there is more than one provider associated to the practice. Always select the facility of Stamford All Locations (SHS). The location of the appointment will be selected later when booking the appointment.

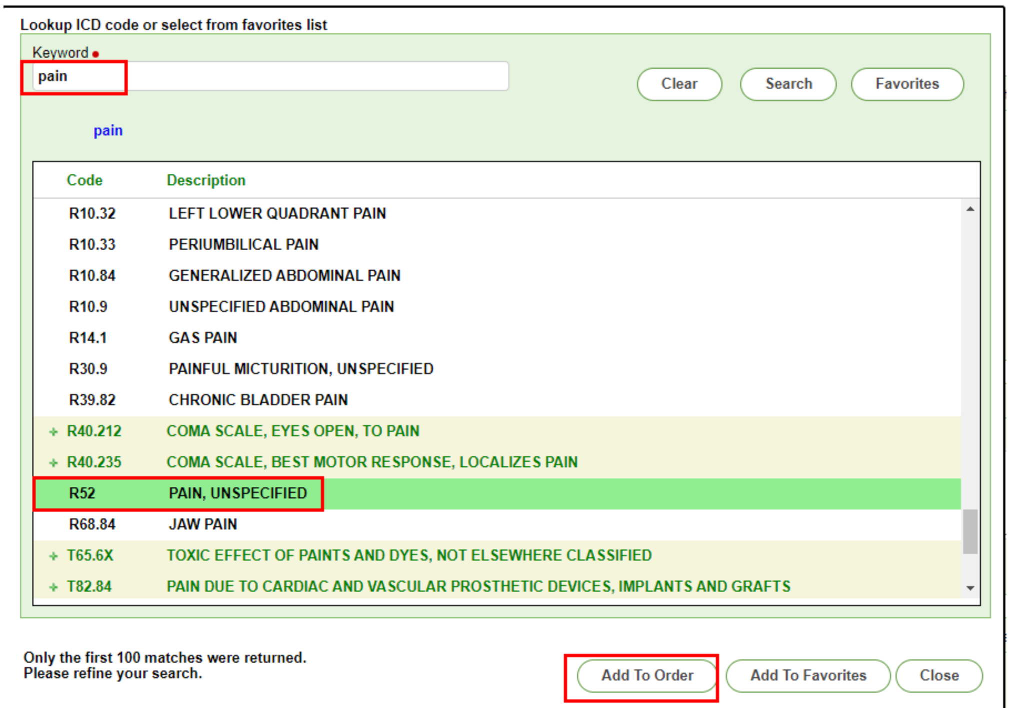



***Please continue to call the STAT line for Radiology STAT read (priority).

Search for ICD-10 codes by selecting the magnifying glass icon

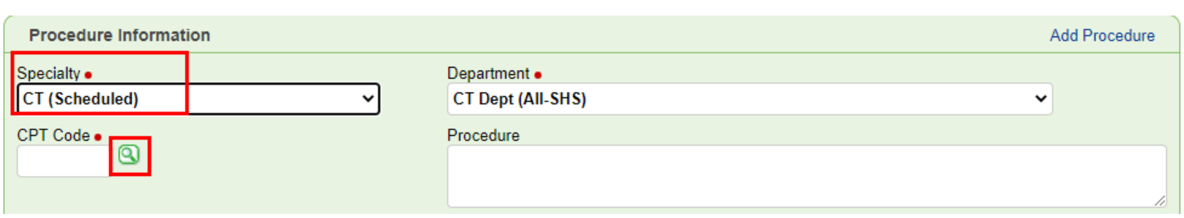



Type in the keyword and select the appropriate code. Select **Add to Order.**

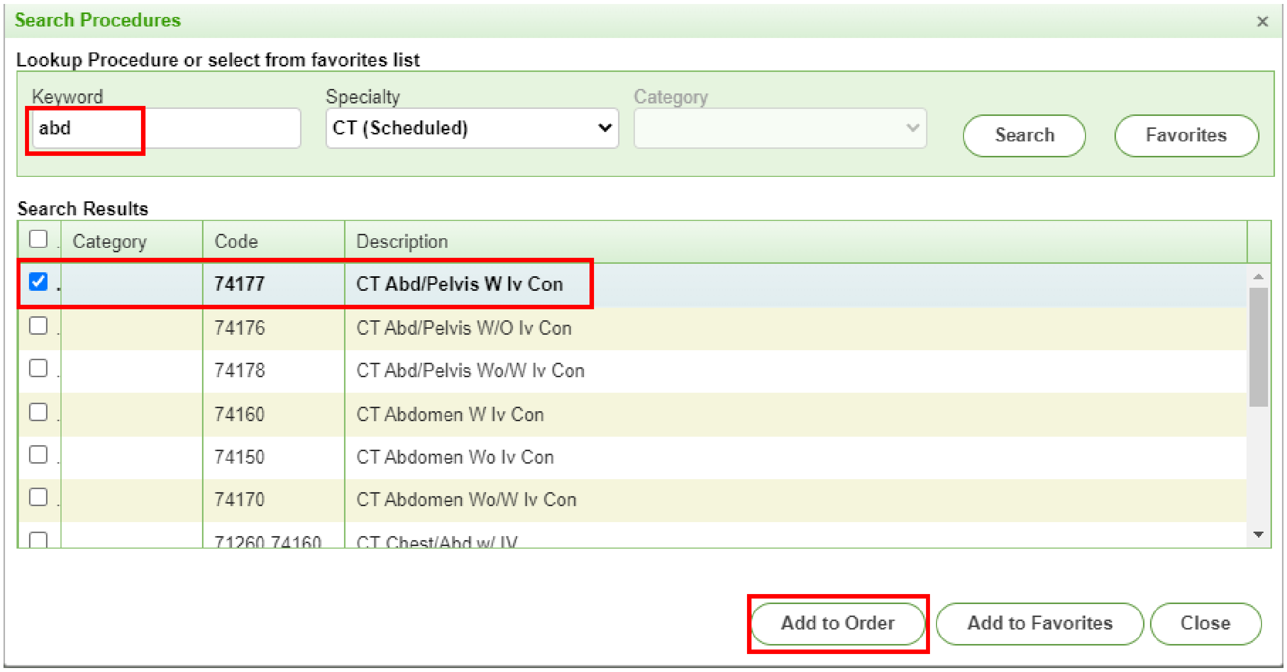



Once the ICD code has been added, type in the reason for visit. The **Reason for Visit** is a free text field.


Using the dropdown, select the desired Specialty (Cardiology, CT, MRI, etc). Search for CPT Code/Procedure by selecting the magnifying glass.

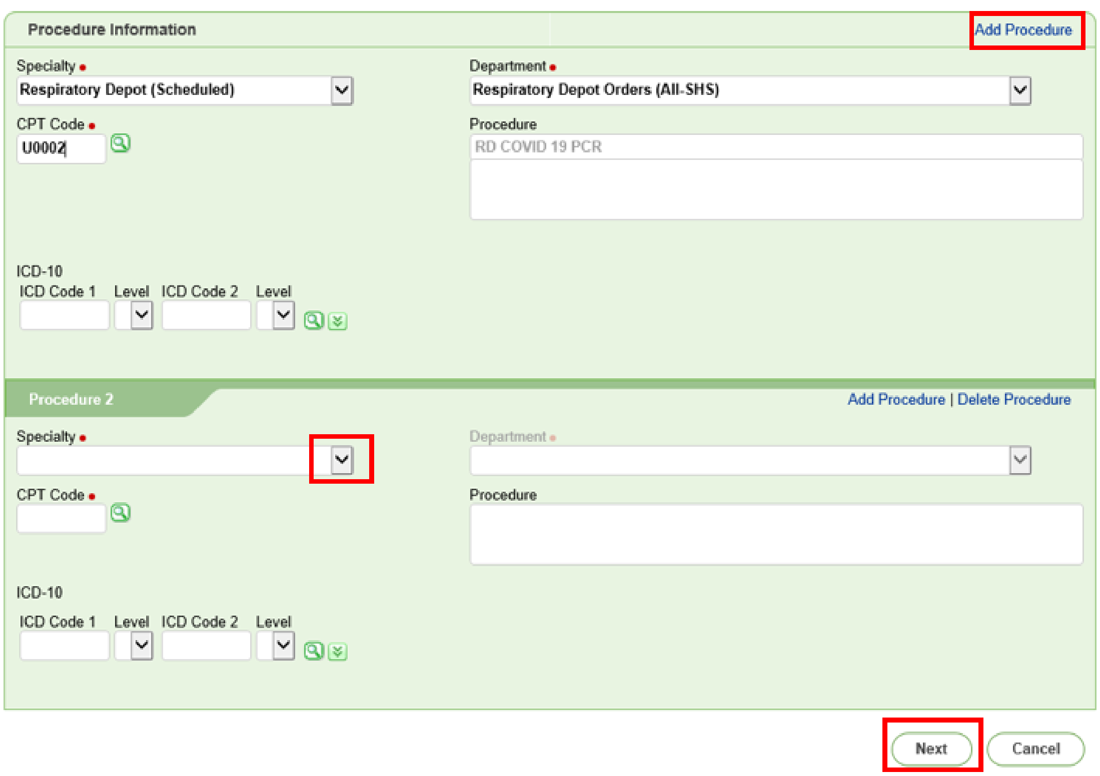


Type in the keyword then select the desired code. Keep in mind, partial name searches may yield better results as seen below. After selecting the code, click on the **Add to Order** button at the bottom of the page.

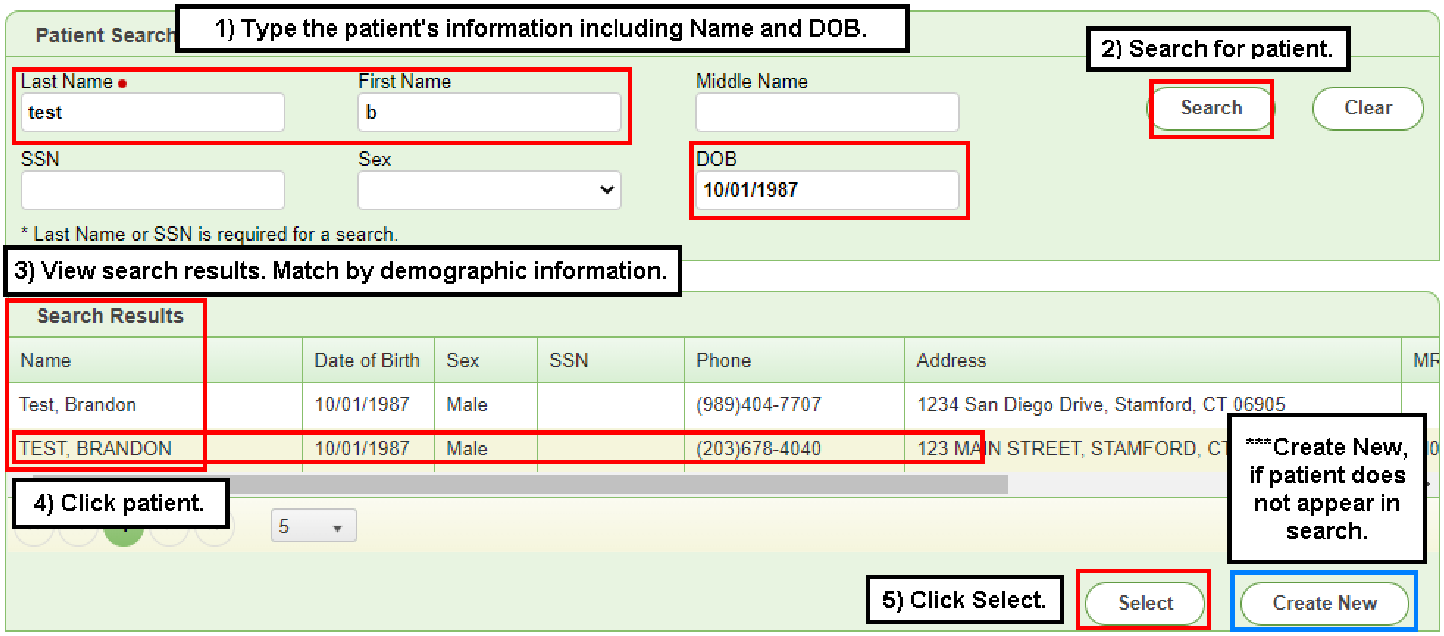



If additional procedures are being ordered, click Add Procedure and Procedure 2 will display. Follow same steps to complete procedure information. When finished select **Next**.

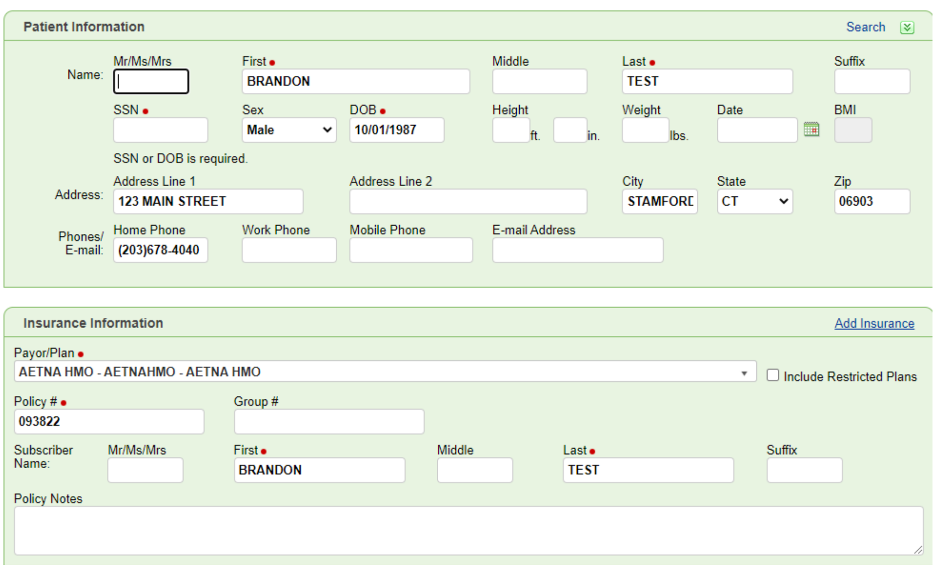
**<u>NOTE:</u>** To remove a procedure click on **Delete Procedure**



Type the patient's information and click Search. Any patients which meet the search criteria will display. Confirm the correct patient by matching the demographic information and select the patient line. Confirm the selection by clicking Select. The patient information will auto populate the fields. If the patient is new to the system, select Create New and enter the required information.




The patient's demographic information and associated insurances will display. If it is a new patient, an insurance will need to be entered as well.



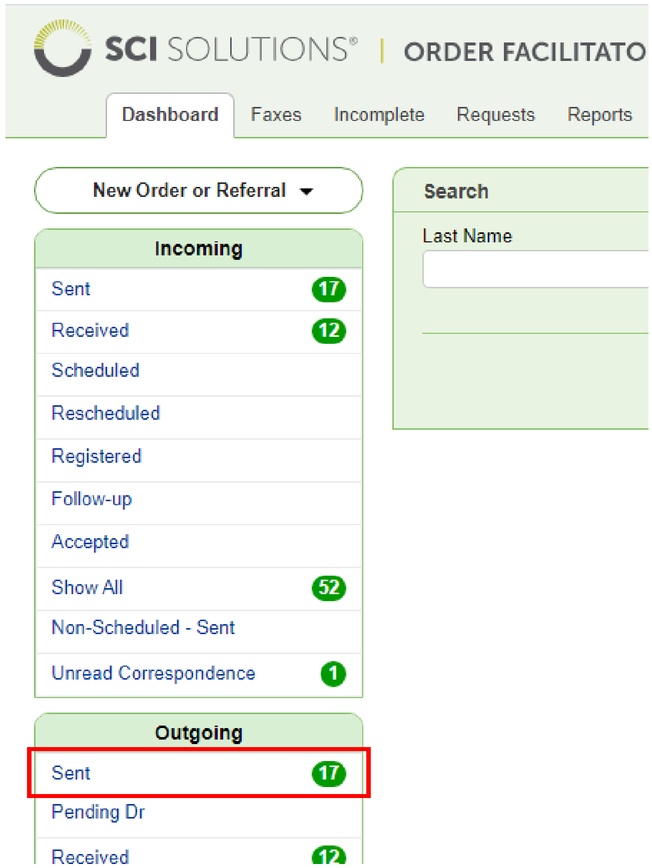

Continue selecting Next until the Review/Submit tab appears. Once the information has been reviewed:

- Select **Send/Schedule** to submit the order and start scheduling the appointment. (Skip to the *Scheduling an Appointment* section on page 10)

- Select **Send Order** to only submit the order. You will need to search the order later when you are ready to schedule the appointment.

## Searching for the Order

Within the Outgoing section, the **Sent** folder displays all orders that have not been used to schedule an appointment. The order created will appear in this Sent folder.



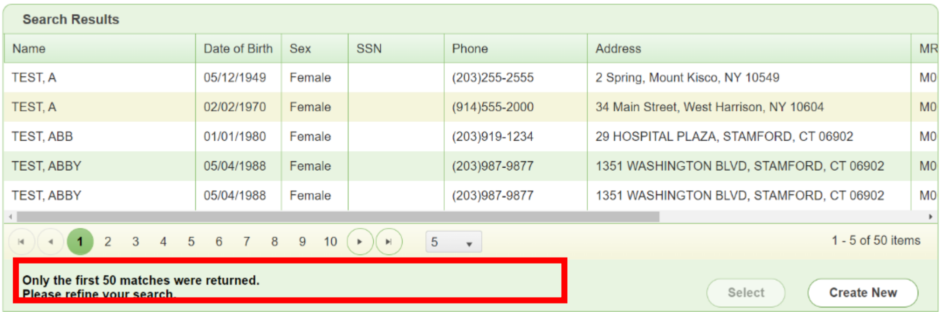

You may sort this folder by clicking on a column header such as by date. The order will display the Patient, the Ordering Provider, the Procedure, and the date the order was received in the system.

**Outgoing: Sent** — 12/12/2020 - 01/25/2021

1 2 — 1 - 15 of 17 items

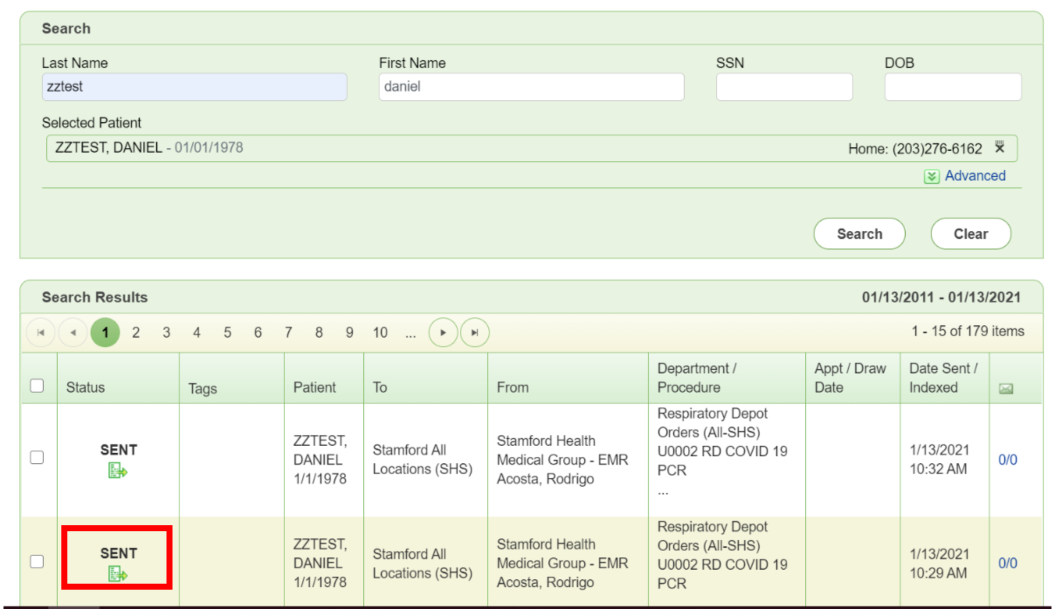
| Status | Tags | Patient | To | From | Department / Procedure | Appt / Draw Date | Date Sent / Indexed | |
|---|---|---|---|---|---|---|---|---|
| SENT | | ZZTEST, DANIEL 1/1/1978 | Stamford All Locations (SHS) | Stamford Health Medical Group - EMR Acosta, Rodrigo | Respiratory Depot Orders (All-SHS) U0002 RD COVID 19 PCR | | 1/20/2021 1:32 PM | 0/0 |
| SENT | | ZZTEST, DANIEL 1/1/1978 | Stamford All Locations (SHS) | Stamford Health Medical Group - EMR Acosta, Rodrigo | Radiology/Diagnostic Imaging Dept (All-SHS) 72265,... XR FL Myelogram Lumb... | | 1/20/2021 1:31 PM | 0/0 |
| SENT | | ZZTEST, DANIEL 1/1/1978 | Stamford All Locations (SHS) | Stamford Health Medical Group - EMR Acosta, Rodrigo | Radiology/Diagnostic Imaging Dept (All-SHS) 72265,... XR FL Myelogram Lumb... | | 1/18/2021 2:36 PM | 0/0 |
| SENT | | ZZTEST, ANDREW 1/8/1957 | Stamford All Locations (SHS) | Stamford Health Medical Group - EMR Acosta, Rodrigo | Radiology/Diagnostic Imaging Dept (All-SHS) 72265,... XR FL Myelogram Lumb... | | 1/18/2021 2:01 PM | 0/0 |

**Note: the number of pages at the bottom allows schedulers to review the next set of patients.**




If you are looking for a specific patient, search for the patient's order by typing in the patients **Last Name and First Name** or **SSN** then select **Search**. Select the desired patient from the drop down by clicking on it.

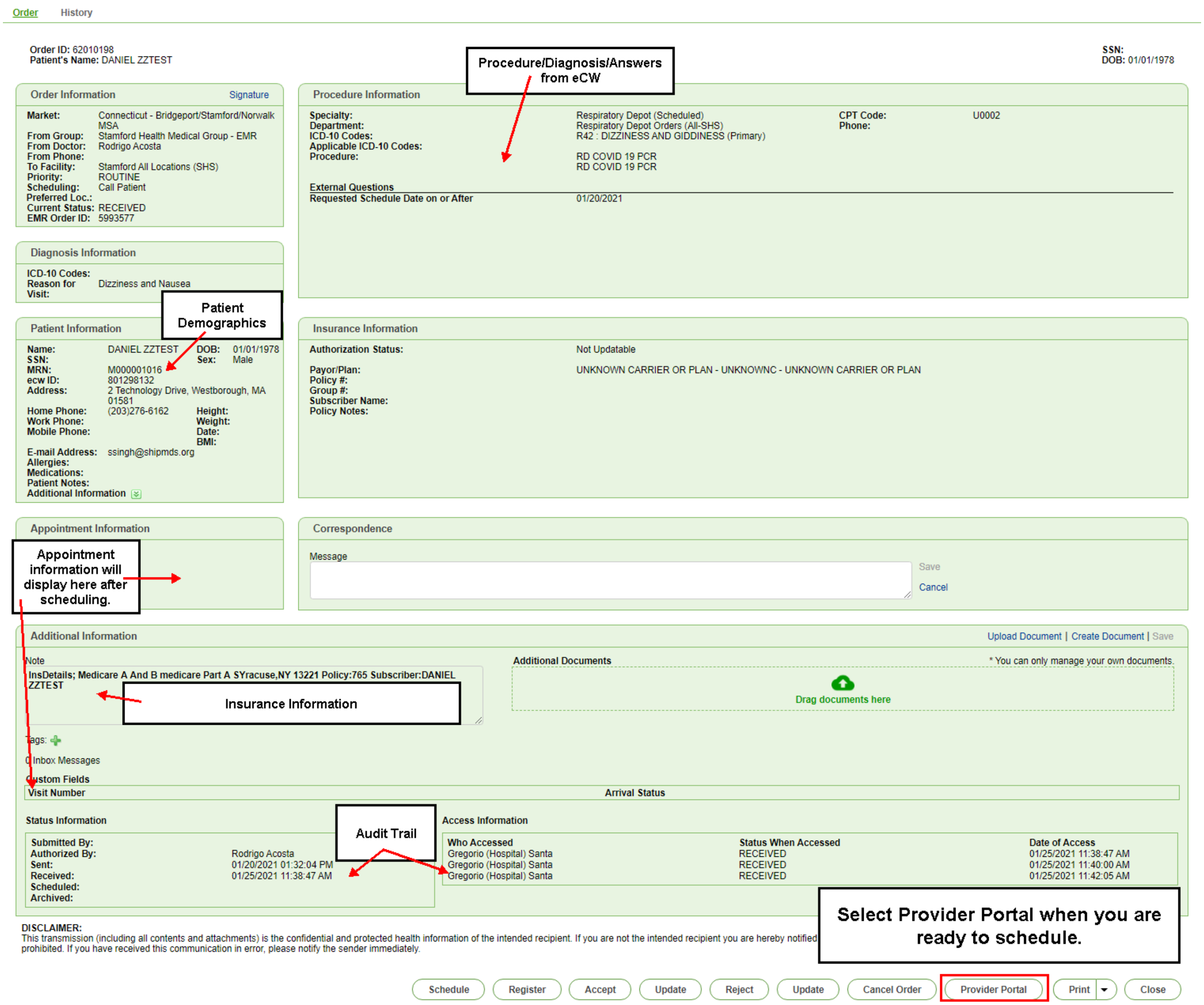

After selecting the patient, select the order from the Search Results by clicking on it. The order **<u>must</u>** be a **<u>Sent</u>** order. Keep in mind, the patient's list of orders will have other orders from past appointments.




Common Statuses:

- **Sent** – Order has been received.
- **Received** – Order was viewed, but not scheduled.
- **Scheduled** – Order has been used/attached to a scheduled appointment.
- **Rescheduled** – Appointment tied to the Order was rescheduled.
- **Rejected** – Order did not have sufficient information to use for an appointment.

Once the order has opened, select the **Provider Portal** button on the bottom of the page to launch Provider Portal.



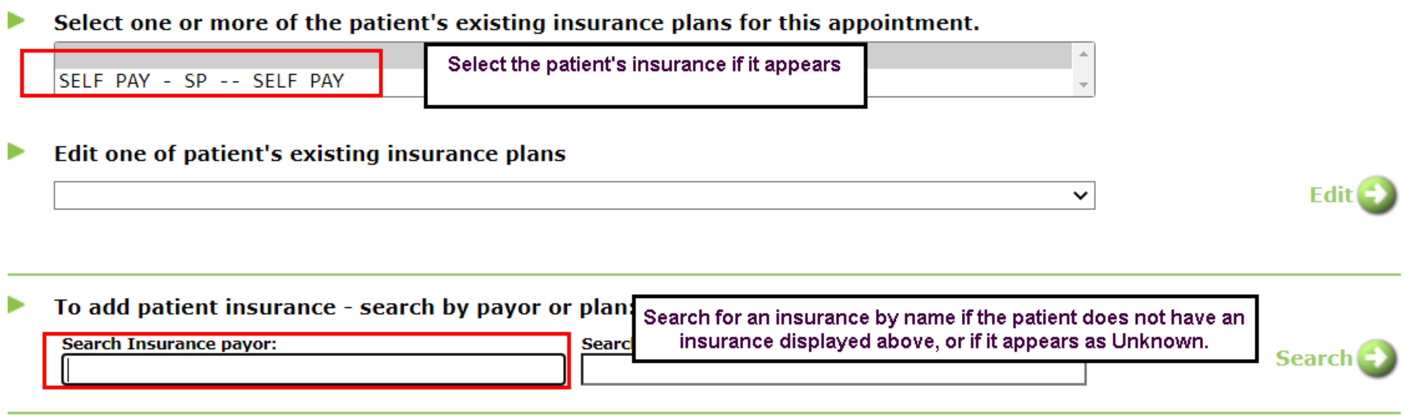

## For same day appointments, please contact the appropriate department at 203-276-xxxx.

| | |
|---|---|
| **Radiology Central Scheduling** | **2602** |
| **Radiology STAT Read Exams** | **6190** |
| **Respiratory Depot/COVID19** | **3300** |
| **Cardiology – Hospital** | **7482** |
| **Cardiology – Tully** | **2283** |
| **Pulmonary** | **7492** |
| **Neurology - Hospital** | **7543** |

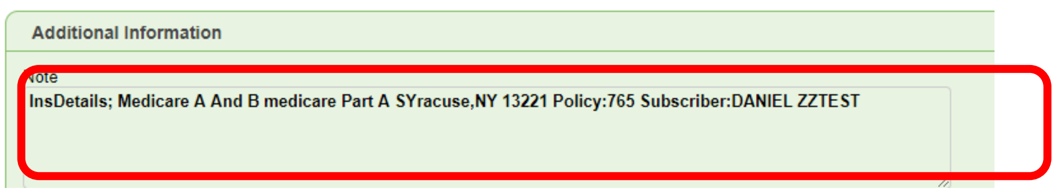
# Scheduling an Appointment

### Step 1: Insurance

First, select the appropriate insurance from the list; if there is no insurance listed, search for a new insurance using the search function indicated by the 2nd green arrow.

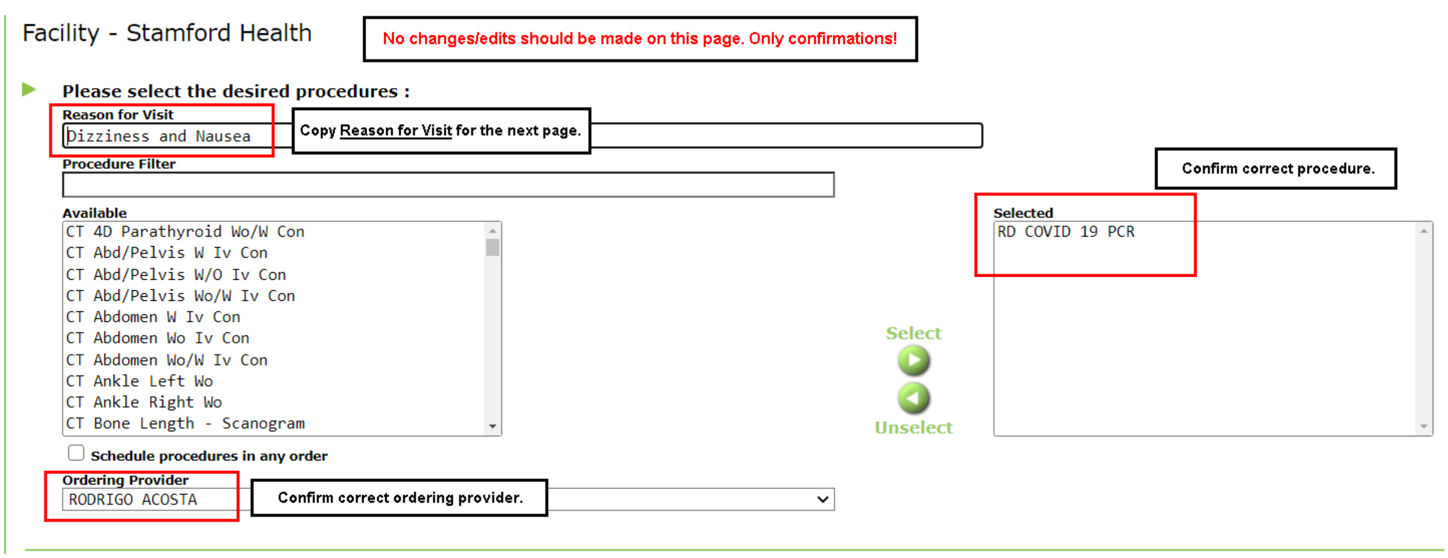



If insurance says **"UNKNOWN, UNKNOWN"**, select the appropriate insurance that is listed on the order under Additional information.



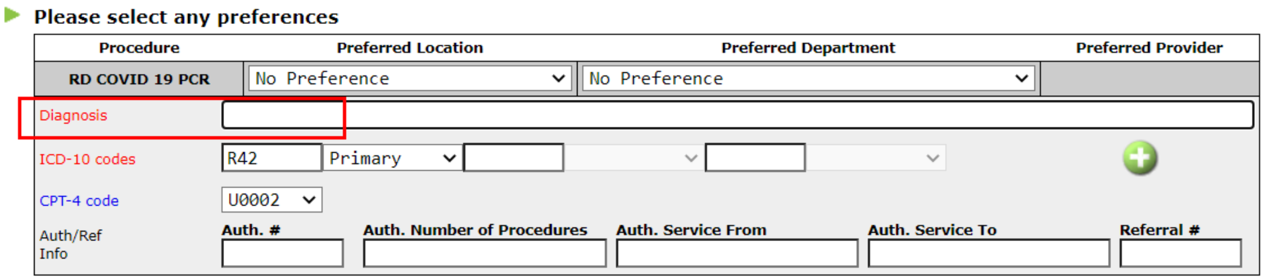

### Step 2: Procedure

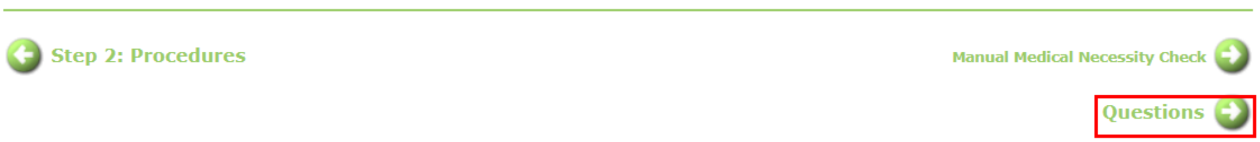
The procedure(s) will prepopulate in the text fields below based up the order entered. Confirm the information is correct and move on to the next step.



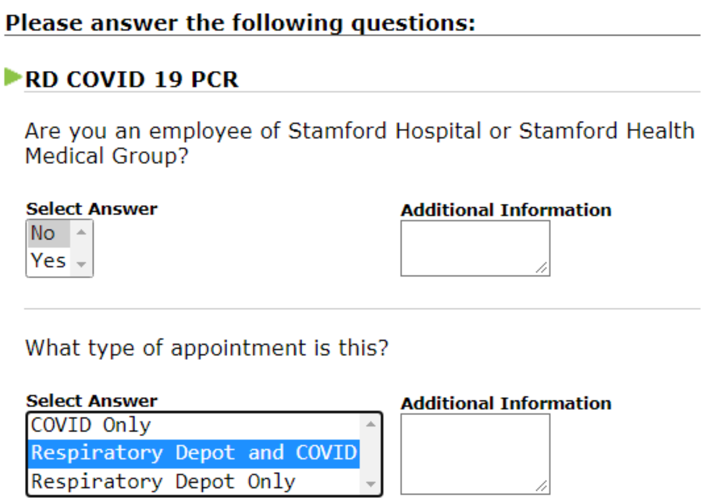
### Step 3: Preferences/Questions

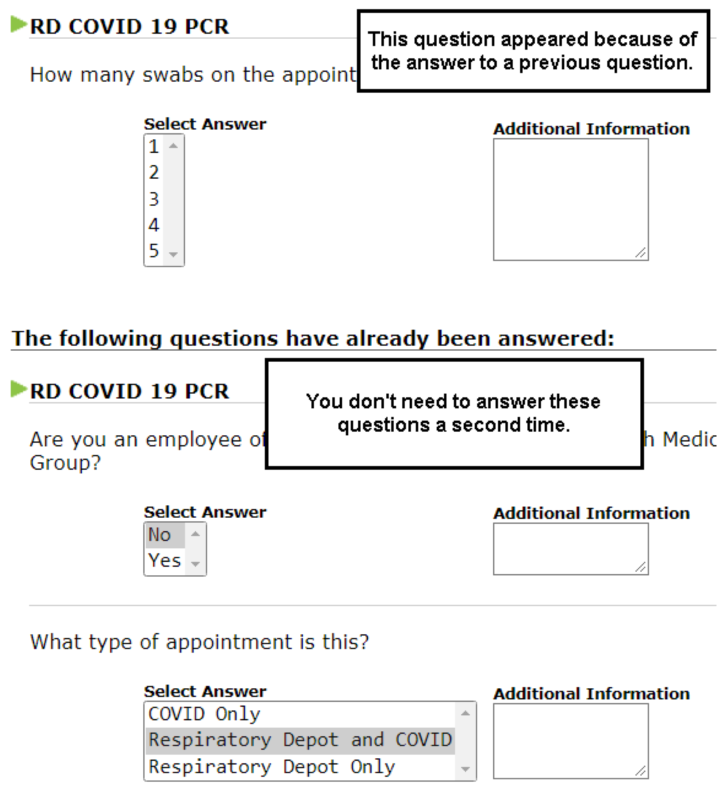
If the Diagnosis does not appear, please type it in or paste the Reason for Visit from the previous screen. Select Questions afterwards to move on.




Answer the questions correctly. The system has rules in the background that adjusts the procedure/time based off the answers provided. Additional questions may appear depending on the answers to previous questions.

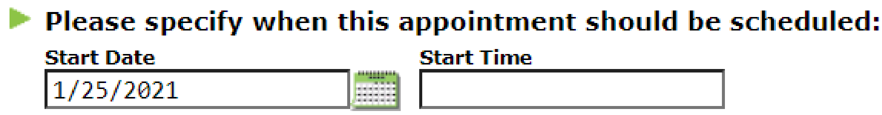


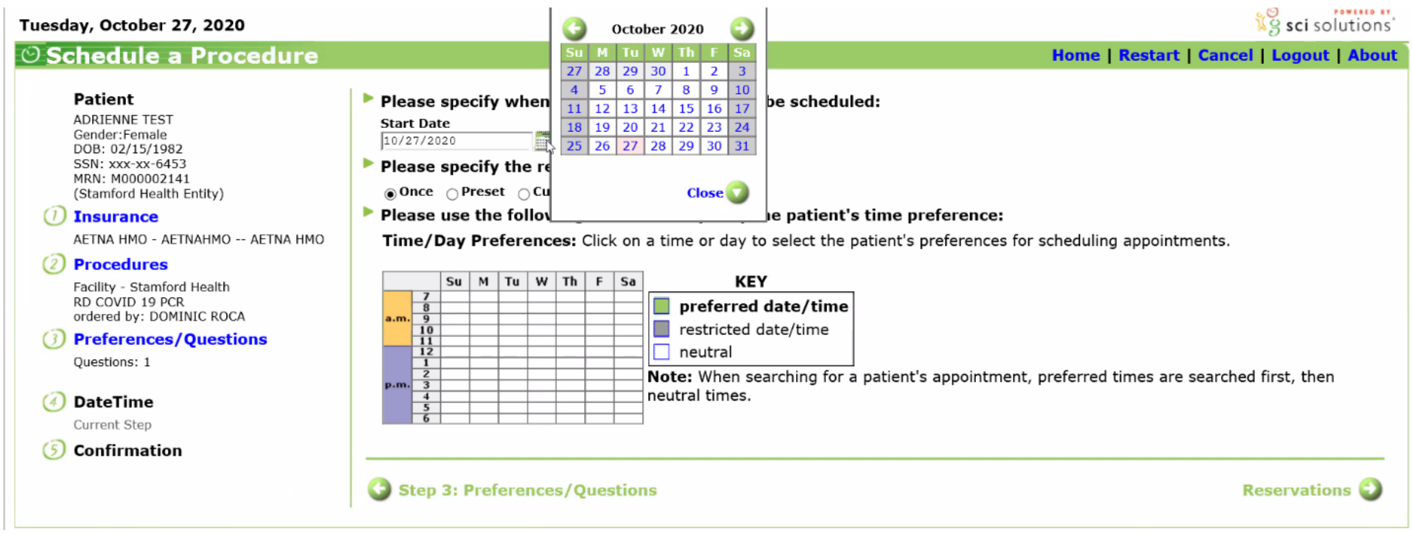
## Step 4: Date Time

**First Available:** If the 1st available appointment is preferred, simply select **Reservations** in the bottom right hand corner without making any edits to the screen.

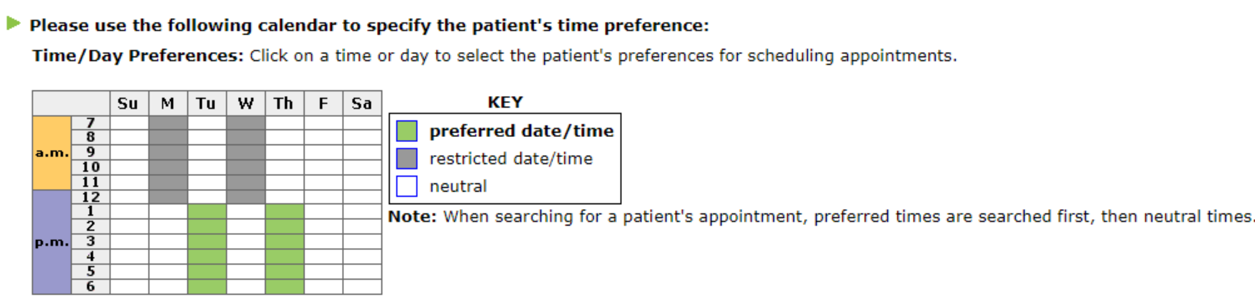
**Exact Date/Time:** Enter the exact date and time be requested. Keep in mind, this date/time may not be available.




**Custom Search:** By selecting the calendar button located next to the start date you can choose the desired date being searched. By selecting a date, it will search for any date from that day forward.

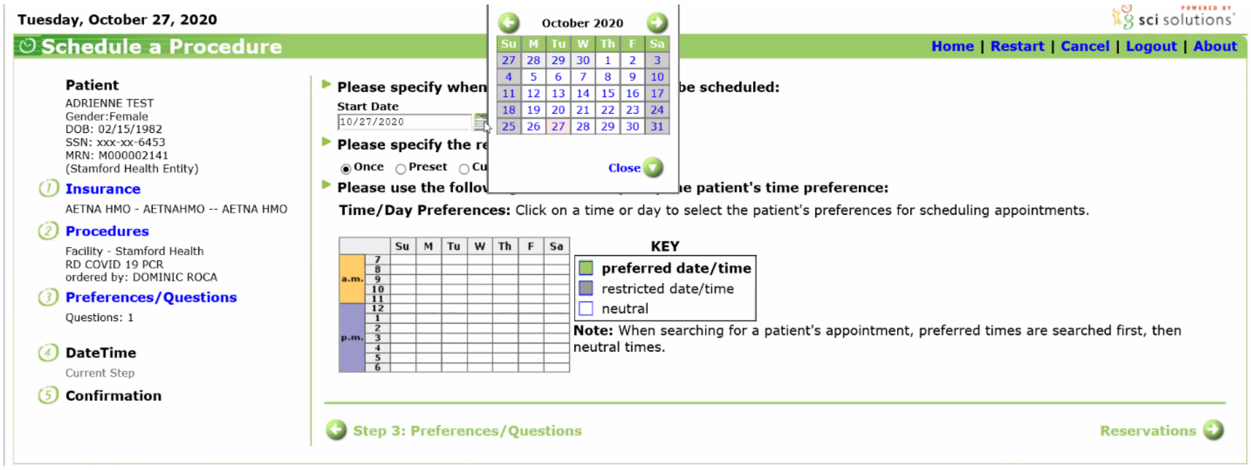



The time/day preferences can be set using the key listed to the right.

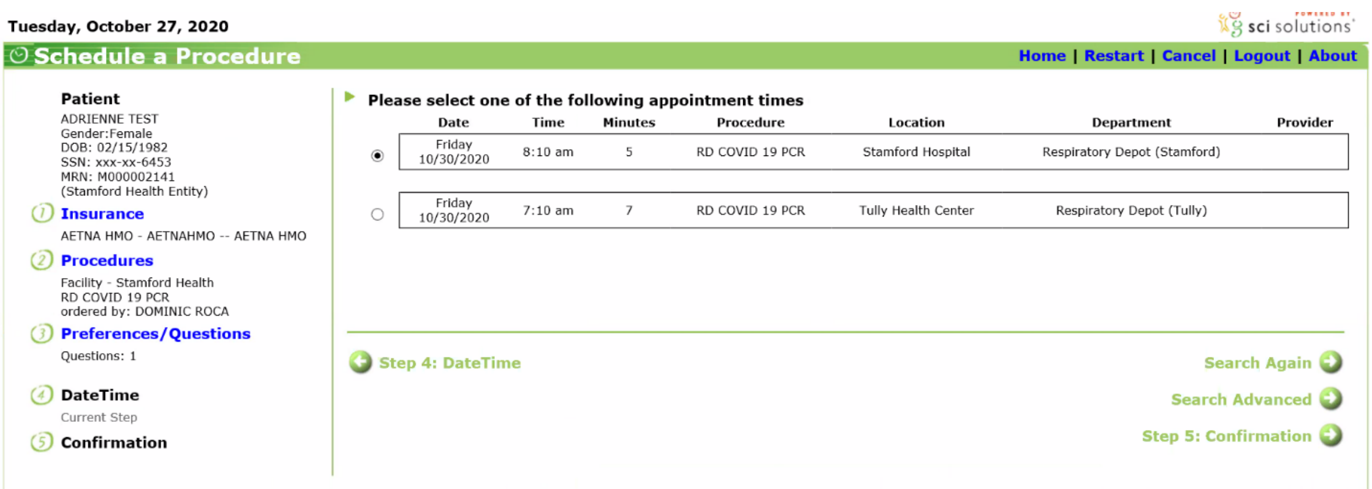



Favorable days/times – using the cursor, click in the box with desired day & time to display a **green** box.
Restrict a day/time - using the cursor, double click in the box with undesired day & time to display a **grey** box.
If no day/time is preferred- leave the box white. To change a day/time to neutral, click in the box 1-2 times to turn the box white.

Once the desired date has been selected, proceed to **Reservations** at the bottom right-hand corner of the screen.




A list of appointment times display; one for each facility. Choose the preferable appointment or select search again for more available times. Use Search Advanced to filter by a specific date or location. **Users do not have the option to overbook.**




**Search Again –** provides additional available times on the screen.

**Search Advanced** – allows entering more specific search parameters. There is also the option to select a preferred location from this search window.

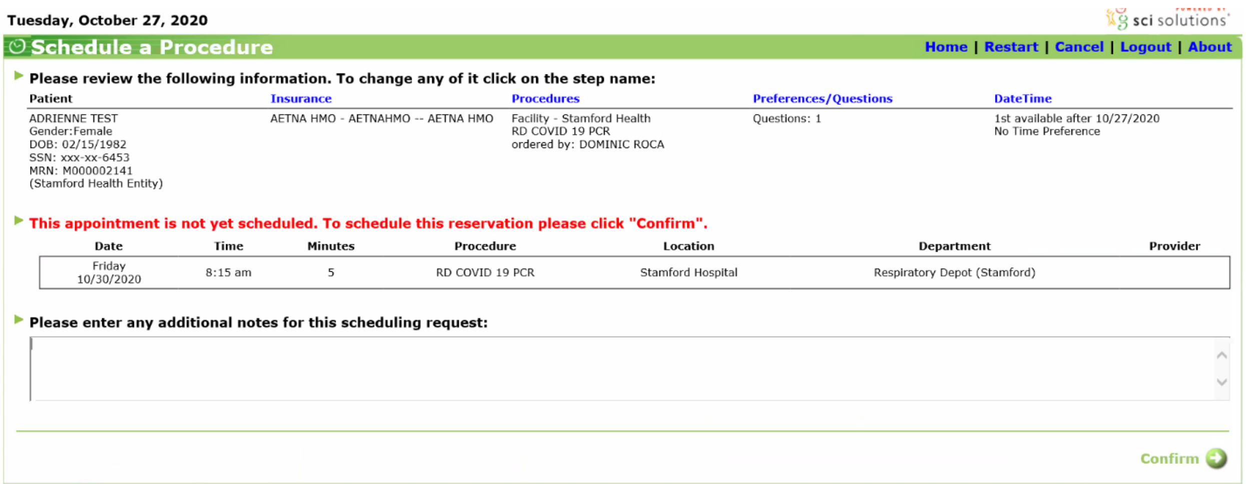
After selecting the desired appointment, click the **Step 5: Confirmation** at the bottom right-hand corner of the screen.

**Step 5: Confirmation**

After selecting your desired appointment, you are provided a review of all information. Verify the information is correct.

Make edits by selecting the headings highlighted in **blue**. You can also add any additional notes for the hospital staff in the in the “**Additional Notes**” free text box provided (ex. patient deaf, needs interpreter, etc).

If the information on the screen is correct continue by selecting **Confirm** at the bottom right-hand corner of your screen. **The appointment will not be booked until you click Confirm.**




Once confirmed, the appointment information displays including patient demographics, prep notes/instructions, etc.

If a confirmation copy for the patient chart is needed, select **Print** at the top of the screen to display the screen shown below which includes the scheduled user and practice.

11/17/2020 Provider Portal : Schedule a Procedure

POWERED BY sci solutions

**The following appointment has been booked:**

**ADRIENNE TEST**
DOB: 02/15/1982
Gender:Female
SSN: xxx-xx-6453
MRN: M000002141(Stamford Health Entity)

**Home Address**
1 HOSPITAL PLAZA
ATLANTA, GA 30341

**Phones**
Home: (770)337-3594
Work: none

**Emails**
Home: ACAMPBELL@SCISOLUTIONS.COM
Work: none

| Date | Time | Minutes | Procedure | Location | Department | Provider |
|---|---|---|---|---|---|---|
| Tuesday 11/24/2020 | 1:00 pm | 10 | RD Flu A/B, COVID19, RSV Quad | Stamford Hospital | Respiratory Depot (Stamford) | |

**Appointment Note**

| | |
|---|---|
| Appointment | Submitted by practice: Stamford Portal Practice<br>Scheduled by user: Stamford User<br>Contact person : Test User<br>Phone : (316) 123-1234 |

Appointment Number: UBHG-3958-2R

If a copy for the patient is needed to include all necessary information such as location, date/time, type of procedure, and any prep you may do so by selecting "**Print Patient Copy"** at the top of the screen to display the confirmation page shown below.

11/17/2020 Provider Portal : Schedule a Procedure

POWERED BY sci solutions

**The following appointment has been booked:**

**ADRIENNE TEST**
DOB: 02/15/1982
Gender:Female
SSN: xxx-xx-6453
MRN: M000002141(Stamford Health Entity)

**Home Address**
1 HOSPITAL PLAZA
ATLANTA, GA 30341

**Phones**
Home: (770)337-3594
Work: none

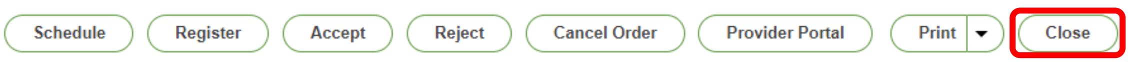
**Emails**
Home: ACAMPBELL@SCISOLUTIONS.COM
Work: none

| Date | Time | Minutes | Procedure | Location | Department | Provider |
|---|---|---|---|---|---|---|
| Tuesday 11/24/2020 | 1:00 pm | 10 | RD Flu A/B, COVID19, RSV Quad | Stamford Hospital | Respiratory Depot (Stamford) | |

Appointment Number: UBHG-3958-2R

The patient's appointment is now scheduled. To access Order Facilitator, close Provider Portal window using X at the top of your screen.  This will bring you back to the Original Order with the appointment details included (after refreshing).

Close Order by selecting the close button at bottom of page. This will return you to the Order Facilitator Dashboard.




**If you have any questions, please contact your Super User or Practice Manager.**