

CharlotteRadiology® Breast Centers

Charlotte Radiology's Provider Portal User Guide

This document provides an overview of:

- Patient eligibility for scheduling via the Provider Portal
- Logging into the Provider Portal
- Scheduling eligible patients via the Provider Portal
- Adding or removing users from the Provider Portal

Patient Eligibility

Patients are eligible for scheduling through the Provider Portal if:

- They are between the ages of 40-75
- They have not had a mammogram within the last 12 months
- There is no identified new problem (e.g., lump, pain, discharge)
- They are not on a protocol for 6-month follow-up that needs diagnostic services
- They are covered by an accepted insurer

*Please call **704-367-2232** for assistance with all other patients.*

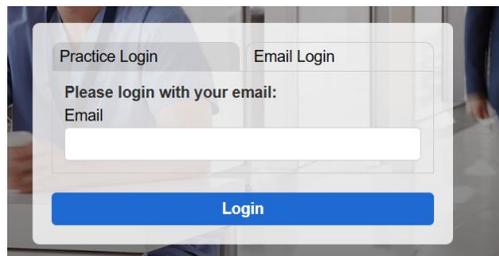
*****Bone density exams require an order for scheduling.**

*Please fax orders to **704-332-2910**. Atrium facilities can enter orders in Epic. Patients **will be cancelled** if an order is not received 36 hours prior to their appointment.*

Logging into the Provider Portal

To log into the Provider Portal,

1. Navigate to <https://asp.scheduling.com/portals01/chanc0477/provider.jsp> in your Google Chrome or Internet Explorer web browser
2. Complete the following fields:
 - a. **Email Login**
 - b. **Password**
3. Select **Login**



The screenshot shows a login form with two tabs: "Practice Login" and "Email Login". The "Email Login" tab is selected. Below the tabs, it says "Please login with your email:" followed by a text input field labeled "Email". At the bottom of the form is a blue button labeled "Login".

Scheduling via the Provider Portal

To schedule a patient after logging into the Provider Portal,

1. Search for the patient
 - a. Complete the following fields:
 - i. **Last Name**
 - ii. **First Name**
 - iii. **DOB**
 - b. Select **Search hospital for patient**

Patient Search Admin | Logout | About

▶ Please enter the following patient information:

Search By Name

Last Name

First Name

Gender

DOB (mm/dd/yyyy)

Search By ID

ID Type

MRN

ID Value

Search hospital for patient

2. Select the **name** of your patient from the list of search results
 - a. If no results are found, create a new patient

- i. Select **Create new patient**

1. Complete all the following fields:
 - a. **First** and **Last Name**
 - b. **Address**
 - c. **Home** and **Mobile Phone**
 - d. **Email Address**
 - e. **Birthdays**
 - f. **Gender**

2. Select **Save, then schedule appointment**

Patient Registration Home | Restart | Cancel | Logout | About

▶ Please enter the following information about the patient: (* required to save a patient)

Names

Legal

First* Middle Last*

Addresses

Home

Phone Numbers

Home* Mobile

Email Addresses

Home

Personal Information

Personal IDs

Birthdays* Gender*

Social Security Number

Save, then schedule appointment

[Save New Patient](#)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
7							
8							
9							
10							
11							
12							
1							
2							
3							
4							
5							
6							

3. Ensure the patient's demographic information is accurate

a. Select **Edit Patient** 

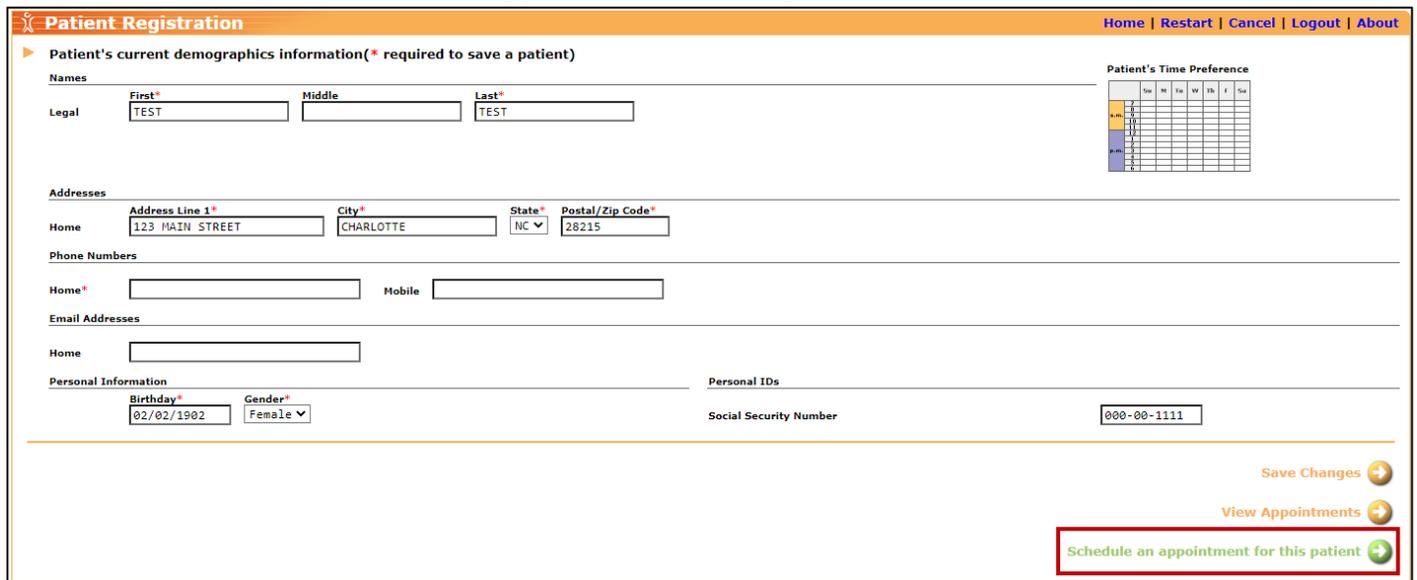
i. Verify and update the following information as needed:

1. **Phone number(s)**
2. **Address**
3. **Email Address**

ii. Select **Save Changes** if any updates were made

iii. *Note: Select **View Appointments** to review any upcoming appointments at Charlotte Radiology for the patient*

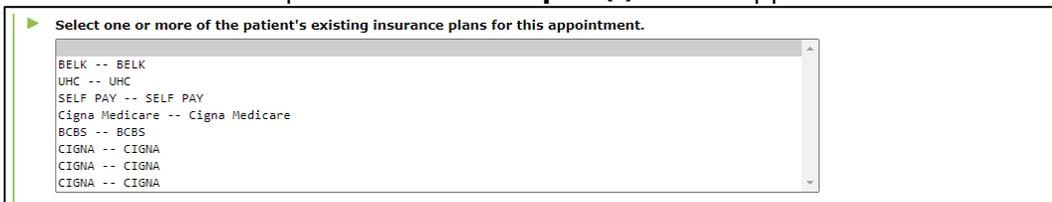
4. Select **Schedule an appointment for this patient**



The screenshot shows the 'Patient Registration' form. The 'Names' section has 'Legal' fields for 'First*', 'Middle', and 'Last*', with 'TEST' entered in the 'First*' field. The 'Addresses' section has 'Home' fields for 'Address Line 1*', 'City*', 'State*', and 'Postal/Zip Code*', with '123 MAIN STREET', 'CHARLOTTE', 'NC', and '28215' entered. The 'Phone Numbers' section has 'Home*' and 'Mobile' fields. The 'Email Addresses' section has a 'Home' field. The 'Personal Information' section has 'Birthday*' (02/02/1902) and 'Gender*' (Female) fields. The 'Personal IDs' section has a 'Social Security Number' field (000-00-1111). A 'Patient's Time Preference' table is visible on the right. At the bottom right, there are three buttons: 'Save Changes', 'View Appointments', and 'Schedule an appointment for this patient', with the last one highlighted by a red box.

5. Update the patient's insurance information

a. Select the patient's **insurance plan(s)** for the appointment from the list OR

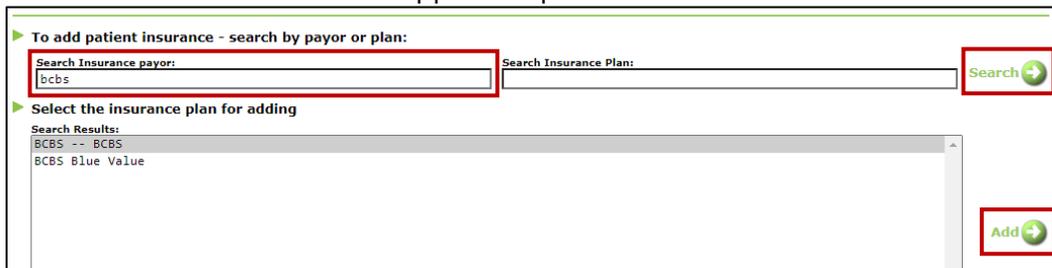


The screenshot shows a list of existing insurance plans for the patient. The list includes: BELK -- BELK, UHC -- UHC, SELF PAY -- SELF PAY, Cigna Medicare -- Cigna Medicare, BCBS -- BCBS, CIGNA -- CIGNA, CIGNA -- CIGNA, and CIGNA -- CIGNA.

b. Add a new insurance plan for the patient

i. Enter the plan or payor name in the **Search Insurance payor** field and select **Search**

ii. Choose the applicable plan from the list of results and select **Add**



The screenshot shows the 'To add patient insurance - search by payor or plan:' interface. The 'Search Insurance payor:' field contains 'bcbs' and is highlighted with a red box. The 'Search Insurance Plan:' field is empty. A 'Search' button is highlighted with a red box. Below, the 'Search Results:' list shows 'BCBS -- BCBS' and 'BCBS Blue Value'. An 'Add' button is highlighted with a red box.

iii. Select **Save Policy**

1. Note: You do not need to enter the Policy or Member Information

► Add a new policy

Payor Name: BCBS
Plan Name: BCBS
Policy Type:

Policy Information

Group Name
Group Number

Policy Owner Information

Policy Owner
TEST TEST

Member Information

Member Number

Cancel Save Policy

c. Select **Step 2: Procedures**

Step 2: Procedures

6. Select the desired procedure(s) to be scheduled for the patient from the list of available procedures:
 - a. Choose the applicable procedure(s) from the list of available procedures:
 - i. **Screening Mamm with 3D (Portal)**
 - ii. **Bone Density (Portal)**
 - iii. Notes:
 1. When scheduling both a mammogram and bone density screening, **select the mammogram first**
 2. Bone density exams require an order for scheduling; fax orders to **704-332-2910**
 - a. Atrium facilities can enter orders in Epic
 - b. Use the **Select** button in the middle of the screen to move a procedure from the **Available** to **Selected** list
 - c. Select the **Ordering Provider** from the dropdown list
 - d. Select **Step 3: Preferences/Questions**

► Please select the desired procedures :

Procedure Filter

Available

Screening Mamm with 3D (Portal)
Bone Density (Portal)

Selected

Select

Unselect

Up
Down

Schedule procedures in any order

Ordering Provider

Step 1: Insurance Step 3: Preferences/Questions

7. Update any preferences as needed
 - a. Choose the patient's **Preferred Location** if applicable from the dropdown list
 - i. *Note: You **do not** need to enter a diagnosis, ICD-10 codes, or CPT-4 codes for the patient*
 - b. Select **Questions**

► Please select any preferences

Procedure	Preferred Location	Preferred Department	Preferred Provider
Screening Mamm with 3D (Portal)	No Preference	No Preference	

Diagnosis

ICD-10 codes 

CPT-4 code

← Step 2: Procedures Questions 

8. Answer any questions displayed, detailing additional information as needed
9. Select **Step 4: DateTime** to continue to the next question
 - a. *Note: Questions that have already been answered will display beneath the current question; scroll down and select **Step 4: DateTime** to continue to the next question*

Please answer the following questions:

► Screening Mamm with 3D (Portal)

Is the patient having any new breast problems?

Select Answer: No Yes

Additional Information:

Is the patient interested in applying for a financial assistance program?

Select Answer: No Yes

Additional Information:

Does the patient have any special needs that may require extra time or other accommodations?

Select Answer(s): No special needs, Deaf/Blind, Group Home, Mentally Challenged, Needs Interpreter. Enter Language-->

Additional Information:

← Preferences Step 4: DateTime 

10. Update the appointment scheduling parameters

- a. Indicate the **Start Date** on which to begin the search for available appointments
- b. Indicate any **Time/Day Preferences** for the patient if applicable
 - i. Select the **box** corresponding to the patient's preferred **time of day** and **day of week** in the grid; you can select multiple days/times
 1. *Note: Preferred date(s)/time(s) will appear in green on the grid*
- c. Select **Reservations**

▶ Please specify when this appointment should be scheduled:

Start Date Start Time

▶ Please specify the recurrence type:

Once Custom

▶ Please use the following calendar to specify the patient's time preference:

Time/Day Preferences: Click on a time or day to select the patient's preferences for scheduling appointments.

	Su	M	Tu	W	Th	F	Sa
a.m.	7						
	8						
	9						
	10						
	11						
	12						
p.m.	1						
	2						
	3						
	4						
	5						
	6						

KEY

- preferred date/time
- restricted date/time
- neutral

Note: When searching for a patient's appointment, preferred times are searched first, then neutral times.

← Step 3: Preferences/Questions Reservations →

11. Choose an appointment time from the list by selecting the **radio button** beside the appointment that works best for the patient

- a. *Note: To view additional appointment times, select **Search Again***
- b. Select **Step 5: Confirmation**

▶ Please select one of the following appointment times

Date	Time	Minutes	Procedure	Location	Department	Provider
<input checked="" type="radio"/> Wednesday 5/4/2022	3:30 pm	10	Screening Mamm with 3D (Portal)	Charlotte Radiology - MMP	Charlotte Radiology - MMP	
<input type="radio"/> Wednesday 5/4/2022	7:30 am	10	Screening Mamm with 3D (Portal)	Charlotte Radiology - Randolph	Charlotte Radiology - Randolph	
<input type="radio"/> Thursday 5/5/2022	10:15 am	10	Screening Mamm with 3D (Portal)	Charlotte Radiology - MMP	Charlotte Radiology - MMP	
<input type="radio"/> Wednesday 5/4/2022	2:45 pm	10	Screening Mamm with 3D (Portal)	Charlotte Radiology - Randolph	Charlotte Radiology - Randolph	

← Step 4: DateTime Search Again →

Search Advanced →

Step 5: Confirmation →

12. Review the patient and appointment information to ensure accuracy

13. Select **Confirm**

Schedule a Procedure Home | Restart | Cancel | Logout | About

▶ Please review the following information. To change any of it click on the step name:

Patient	Insurance	Procedures	Preferences/Questions	DateTime
TEST TEST Gender: Female DOB: 02/02/1902 SSN: xxx-xx-1111 MRN:	Cigna Medicare -- Cigna Medicare	Facility - Charlotte Radiology Screening Mamm with 3D (Portal) ordered by: GREGORY MICHAEL BROUSE	Questions: 6 <u>Preferences</u> Location: Central Charlotte Market	1st available after 05/03/2022 No Time Preference

▶ This appointment is not yet scheduled. To schedule this reservation please click "Confirm".

Date	Time	Minutes	Procedure	Location	Department	Provider
Wednesday 5/4/2022	3:30 pm	10	Screening Mamm with 3D (Portal)	Charlotte Radiology - MMP	Charlotte Radiology - MMP	

▶ Please enter any additional notes for this scheduling request:

Confirm

14. Select **Print Patient Copy** to print the appointment confirmation and provide it to the patient

Schedule a Procedure Home | Print | **Print Patient Copy** | Logout | About

▶ The following appointment has been booked:

Patient	Insurance	Procedures	Preferences/Questions	DateTime
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Additional Notes:

- To begin the scheduling workflow again from the beginning for the current patient without saving any current appointment parameters, select **Restart**
- To exit a workflow within the provider portal and return to the Patient Search screen, select **Cancel**

Schedule a Procedure Home | **Restart** | **Cancel** | Logout | About

Adding or Removing Users from the Provider Portal

Managers can request to add or remove users from the Provider Portal by emailing providerportalcr@usradiology.com.

Requests should include the **Practice Name** and **Address** as well as the following information for each user:

- **First Name**
- **Last Name**
- **Email Address**