



How To

Conduct a Provider Search

Audience

All Users





Provider Record Search



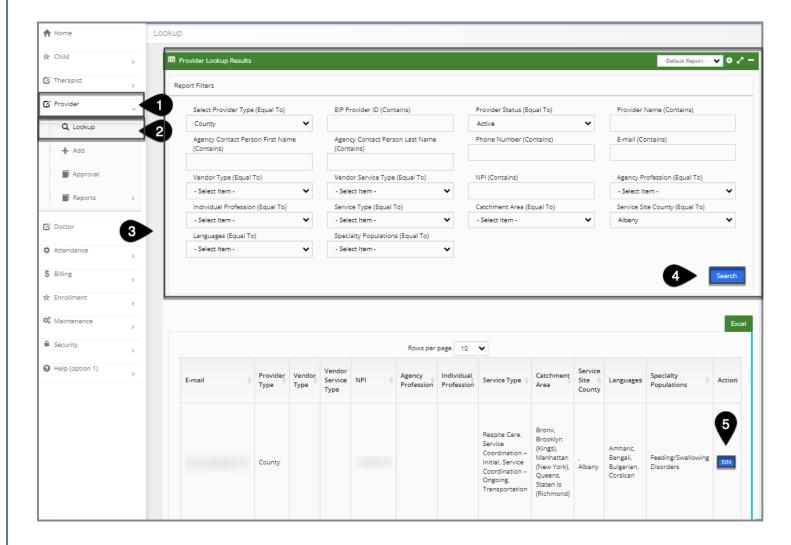
The **Provider Lookup** functionality should be utilized primarily for providers seeking to make minor revisions to their provider record. For example, if a provider is up for reapproval and needs to make minor changes to their record, the Provider Lookup is ideal.

Municipal users can use Provider Lookup to research approved providers. Search results will be limited to providers with DOH approval (basic agreements or appendix).

The Provider Lookup results will include all historic and current catchment areas and service types. Because of this, the **Central Directory Report** should be used to identify providers for service authorization assignment. Please see the next slide for more information on using the **Central Directory Report**

Step/Action

- 1. Click **Provider** on the main menu on the left-hand side.
- 2. From the drop-down menu, Choose Lookup.
- 3. Within the **Provider Lookup Results Filter**, you can enter known provider specific information.
- 4. Click Search.
- 5. To view the Provider Record, click Edit.
- 6. The provider record will display enabling navigation using tabs and panels.









Provider Record Search

Central Directory Report to Identify Providers for Service Authorization Assignment

Users (i.e. counties and service coordinators) should rely on the Central Directory Report to identify providers they wish to assign to children.

The **Central Directory Report** is most appropriate for users seeking active providers within a certain service area or providing specific service models (service types).

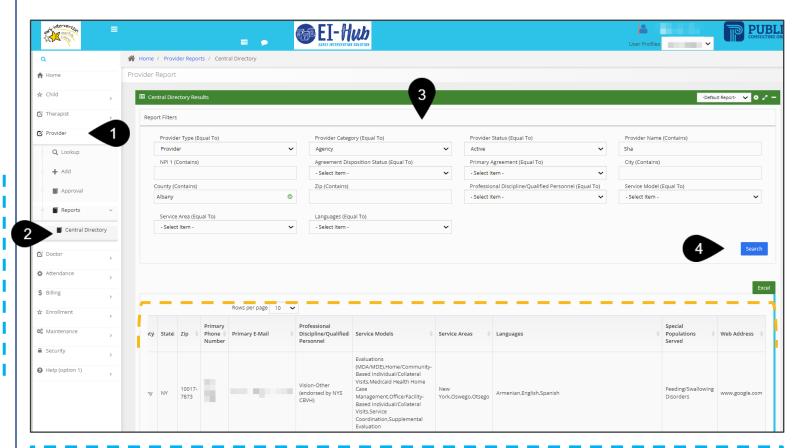
Once a provider is identified, they can be assigned through the processes outlined in the Creating Service Authorizations Job Aid(s).

Step/Action

- Click **Provider** on the main menu on the left-hand side.
- Select **Central Directory** from the **Reports** menu.
- Within the **Central Directory Results Grid**, you can filter providers based on your service needs.
 - 1. It is recommended that all searches are filtered by Provider Type (Provider) and Provider Status (Active).
 - 2. Narrow search results by Service Model, Service Area, County, etc.
- Click Search.







NOTE:

When searching for providers to assign to service authorizations, users should search only those with an Appendix 1 Agreement with the state, including agencies and individuals. This can be done in three ways:

- Using the **Primary Agreement** filter to run two searches;
 - 1. Filter by "Agency: Appendix 1 Agreement," then,
 - 2. Filter by "Individual Appendix 1 Agreement."
- Run the search without filtering by Primary Agreement and then sort by Provider Agreement Type.
- Run the search without filtering by Primary Agreement and then use the Export Button.
 - 1. Open the results in excel and filter for "Agency: Appendix 1 Agreement" and "Individual: Appendix 1 Agreement."





Provider Record Search

Central Directory Report to Identify Potential Contractors and Subcontractors

Users (i.e. counties and agencies) should rely on the **Central Directory Report** to *identify* providers they may wish to contact for potential contracting or sub-contracting relationships.

The **Central Directory Report** is most appropriate for users seeking active providers within a certain service area or providing specific service models (service types).

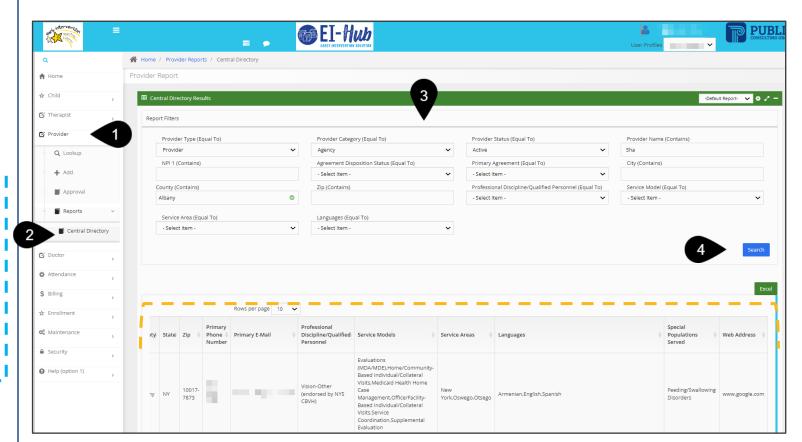
Reminder: Agencies and Individuals with a Basic Agreement or Appendix 1 Agreement can work as contracted providers.

Step/Action

- 1. Click **Provider** on the main menu on the left-hand side.
- 2. Select Central Directory from the Reports menu.
- 3. Within the **Central Directory Results Grid**, you can filter providers based on your service needs.
 - It is recommended that all searches are filtered by Provider Type (Provider) and Provider Status (Active).
 - 2. Narrow search results by **Service Model**, **Service Area**, **County**, etc.
- 4. Click Search.







Quick Steps to Add a Contractor:

- 1. Perform **Provider Lookup** on the left side navigation of the homepage. This will bring you to your agency's provider profile.
- 2. Navigate to the **Provider Information Tab** and click on the **Contracted Provider Panel** in the left-hand navigation of the tab.
- Click on the Add Contracted Provider Button to search for and add a new relationship with an agency or individual as a contracted vendor.

For more information on how to add a contracted provider, see Unit 10 of the Case Management User Guide.





Provider Record Search

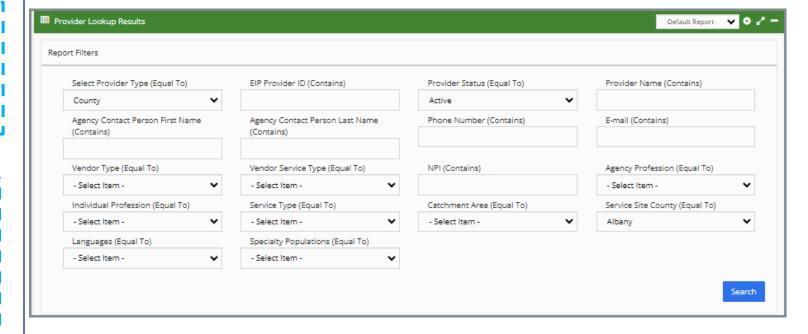


Search Tips

- To refine your search results, enter as much information as you know about the Provider.
- If your search does not return your expected result:
 - Confirm the spelling and numbering in any typed field
 - Check that any field with a drop-down menu is accurate or left blank (reads 'Select').

Providers and Therapists

- In EI-Hub Case Management, services are associated with 'Providers' and 'Therapists.'
- 'Providers' are agencies or individuals who have current or past DOH approval. These entities may either be reflected as a "Provider', a "Rendering Therapist", or both on service authorizations.
- 'Therapists' are individuals who are assigned to a child's case as a rendering provider, service coordinator, or Early Intervention Official-Designee. These individuals are employees or contractors of an approved EIP agency.









Provider Record Search



Search Tips

- For active providers including migrated data, the end date is open. However, inactive provider records will contain this value and it can be used when filtered results.
- Active means your agreement is approved and has not expired.
- --If searching for Service, ...If a provider agreement is still active and no longer providing the service, the provider will display for OT or PT Services.
- Add services screens.







Revision History

Version Number	Release Date	Author	Revision Summary
v0.1.0	1.19.2022	Evan Thibeau	First Draft Release
v0.1.1	1.19.2022	Evan Thibeau	First visual revisions
v0.2.0	1.30.2022	Evan Thibeau	Revision w/ BEI Notes
v0.3.0	2.15.2022	Evan Thibeau	Second revision
v0.4.0	3.15.2022	Evan Thibeau	Third Revision
V0.5.0	8/17/23	Matthew O'Brien	Screen Shot Update
V0.5.1	09/22/2023	Jessica Yorkman	Updated screenshots and revised text and formatting

