Provider Finder Setup and Support Guide

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Your Responsibilities for Safe Use

This documentation will help guide you through the available software configuration options so you can decide the right configuration for your organization. Of course, safe and compliant use of the software in any configuration requires you and your users to use good judgment and perform certain responsibilities, including each of the following: enter and read information accurately and completely; be responsible for configuration decisions; ensure compliance with laws and regulations relevant for your organization; confirm the accuracy of critically important medical information (e.g., allergies, medications, results), just as you would with paper records; actively report suspected errors in the software to both Epic and affected personnel; thoroughly test the software to ensure it's accurate before using it; and use the software only according to standards of good medical practice. You also are responsible for training your personnel and other users to perform these responsibilities. Not performing any of these responsibilities may compromise patient safety or your compliance with applicable requirements.

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Provider Finder Setup and Support Guide

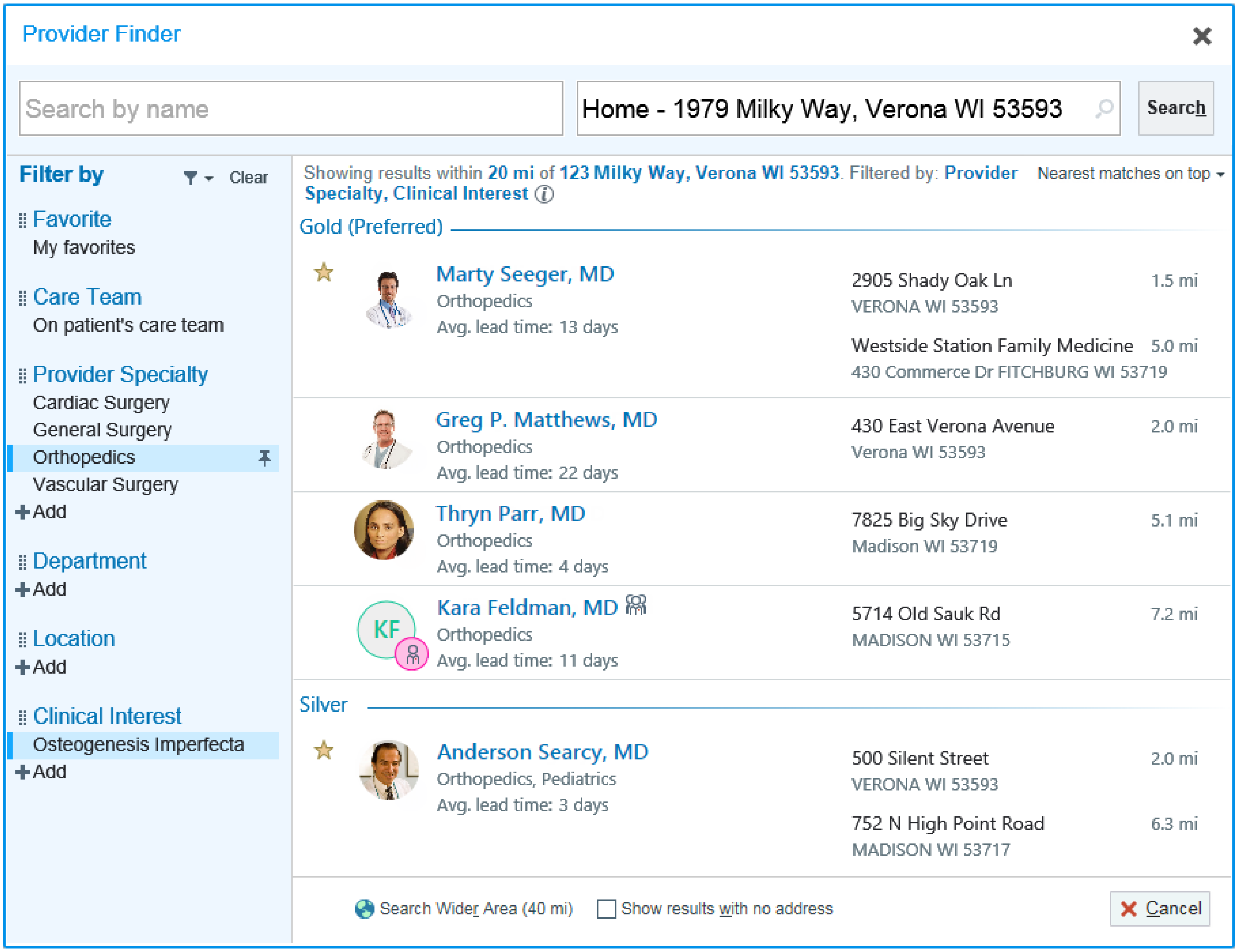
Epic has multiple features called Provider Finder:

- The one described in this guide helps users find the right provider for a referral or case and is integrated into common clinical and access workflows in Hyperspace.
- The one described in the Locating Providers Setup and Support Guide serves as a standalone activity to help Hyperspace users search for providers on an ad-hoc basis.
- The one described in the MyChart Provider Finder Setup and Support Guide helps patients locate the right provider to meet their clinical needs and preferences in MyChart.

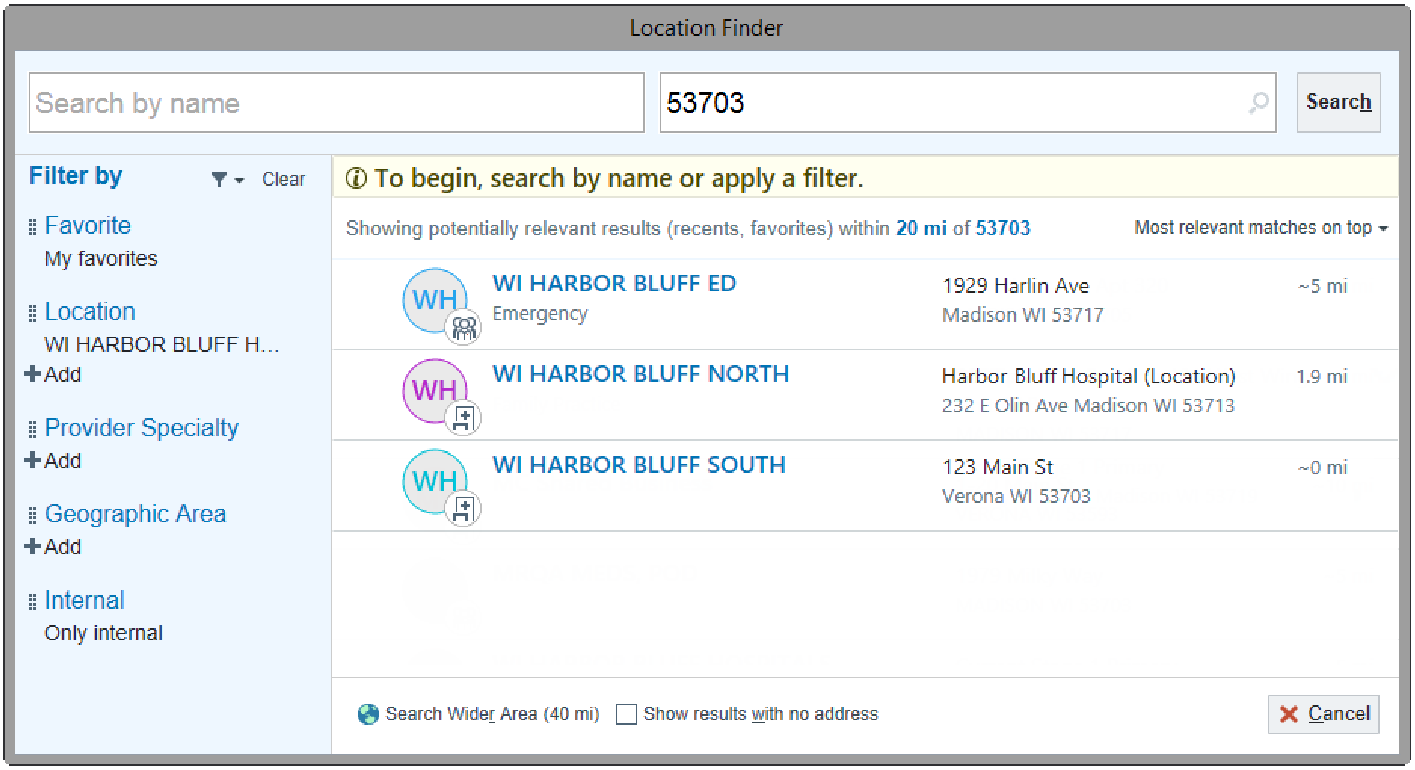
Check the other guides if you can't find what you're looking for here.

When users need to find a provider in Hyperspace, like a clinician creating a patient's referral or a case manager searching for a facility, they typically open Provider Finder. This window contains search fields for name and location, filters users can apply to limit results, and essential provider information, like their physical address. Users can also mark certain providers as their favorites so they're easy to find during subsequent searches. If you use Provider on the Fly, users can create providers from Provider Finder as well.

Provider Finder appears in most common Hyperspace locations where a user performs searches that might benefit from more advanced search options: placing referral orders in the visit taskbar, picking providers in Referral Entry, and more.



In Referral Entry and when placing referral orders, Provider Finder also appears as Location Finder, which users can open to select a location. The Location Finder and Provider Finder windows look and work the same way, and you need to perform only one setup process for both of them.



You can make it easier for users to find the right results by changing what information appears in the search results and removing filters that aren't useful. For example, you can add information about whether providers are accepting new patients or remove the Gender filter if you don't collect providers' gender information.

How It Works

This section provides background information about how Provider Finder works. Make sure you understand the logic so that you can answer questions from clinicians about how to find the providers and places they need to transition patients to.

Provider Finder appears in the following places:

- Anesthesia Charge Entry
- Chart Review Routing
- Clinical Case Management Continued Care and Services Coordination navigator sections
- Communication Management
- Consult orders that are configured in the Order Composer to use Referral item 20-Referral (From,To,#Visit,Expiration).
- HB Unit Charge Entry
- In Basket
- Media Manager (when you edit the note author)
- Navigator sections:
  - ASAP's Follow-Up (27041-SEC_ER_FOLLOW_UP) section and Disposition and Follow-Up (27040-SEC_ER_DISPOSITION) (August 2021 and earlier versions)
  - EpicCare Inpatient's Follow-Up Providers (36700-SEC_IP_FOLLOW_UP) section
- Order Entry activities. The following display items rely on Provider Finder:
  - 20-Referral (From, To, #Visit, Expiration)
  - 21-Referral to Provider Specialty
  - 69-Referral to Provider
- PCP/Care Teams
- PB Charge Entry
- Referral Entry*
- Referral Order Entry*
- Registration/ADT
- Release of Information disclosures
- SmartSets for ED Disposition and ED Follow-Up
- The Ext Providers button in Tapestry Provider Finder
- Treatment Teams (when you right-click the patient record from the Patient Lists activity and select Treatment Teams)
- Unit Charge Entry

*If you use the Referrals application, refer to the Referred To Provider Lookup topic for additional information about provider search windows available in Referral workflows.

Here's how the search logic works for Provider Finder:

- If a user enters a provider's name in Provider Finder, all records in your database and entries in external directories are searched for providers that match the name entered by the user. For external directories:

  - If an external directory comes from a source that does not have an organization record in the Data Exchange Organizations (DXO) master file, all providers from that directory are included in the search.
  - If an external directory comes from a source that has an organization record in the Data Exchange Organizations (DXO) master file, Provider Finder searches directories from organizations near your organization's Care Everywhere Location records and your organization's main organization record.

- Location information varies depending on whether you license a third-party geodata product:
  - If you use a geodata product, Provider Finder searches based on latitude and longitude information from the geodata vendor, providing more exact location information and letting users sort by distance. For more information, refer to the Enable Provider Searches and Sorting Based on Geodata topic.
  - If you don't use a geodata product, Provider Finder returns search results based on the ZIP Code of that location.

You need to map provider specialties and department specialties so that clinicians can search for departments by specialty. You also need to map provider specialties for providers in external directories to be filtered when a clinician's search includes a specialty. For more information, refer to the Configure Department and Provider Specialties for Direct Messaging topic.

Available Epic Resources

This guide contains the step-by-step setup information needed to configure Provider Finder across your system.

If you're looking for setup information for related features, refer to the links below.

- Provider Network Grouping Setup and Support Guide. This guide covers the overall strategy and setup necessary to group providers together into networks and network levels, which you can use to prioritize certain providers in Provider Finder.
- Geodata Setup and Support Guide. This guide covers the overall strategy and setup necessary to start using geodata at your organization. Geodata is required to sort providers by distance in Provider Finder.

Provider Finder Setup: Essentials

In this section, we'll cover everything that you need to do to configure Provider Finder and Location Finder to match our recommendations.

Control What Users See in Search Results

The information your users see in Provider Finder depends on the context from which they access it. Contexts group together similar workflows that originate from different places in Hyperspace. For example, both clinicians and referrals users often need to look up referred-to providers, but clinicians typically do so when placing orders and referrals users typically do so from Referral Entry. The system uses the same context for referred-to provider lookup in both workflows because both types of users are performing the same type of action. The available search options and provider information in each context depend on its view, called a configuration. Each context can have only one configuration. You can't change which workflows are in a given context, but you can customize how each configuration behaves.

The Epic-released configurations are designed to meet the likely needs of users in each context. However, your organization's workflows might mean you need to take additional steps to keep users from seeing too many or too few details in Provider Finder. You can make copies of the Epic-released configuration records to choose how Provider Finder behaves and what users see in each context.

Explore What Users See by Default

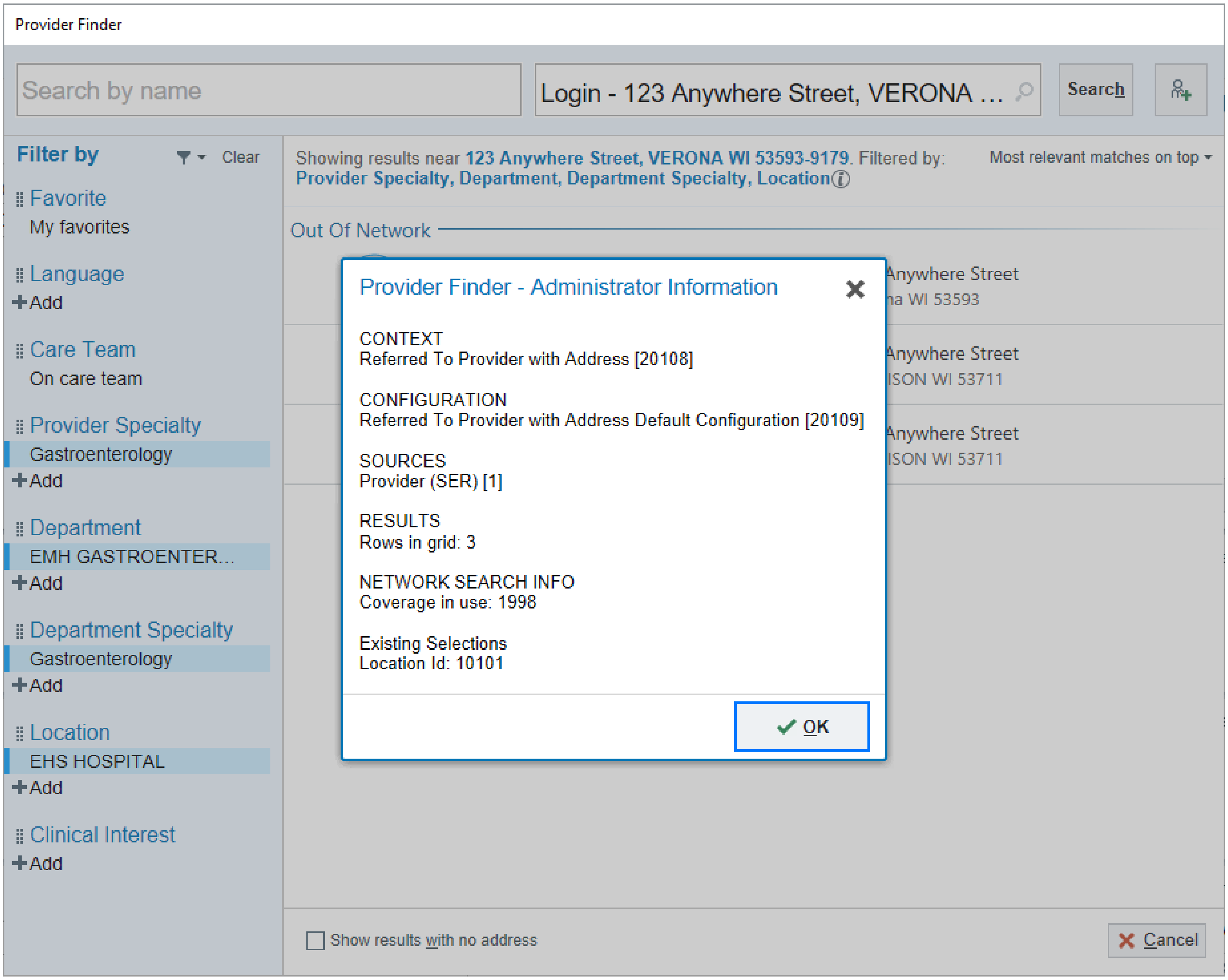
As a test user, log in and review the Provider Finder-enabled workflows you have so you can evaluate their default configurations. Note which ones match your organization's needs and which ones should be more specific or provide more information, like whether a provider is accepting new patients. To learn about where each context is used, open its corresponding configuration below (search: Provider Finder Configuration) and read its description in the Additional Information section.

Remember that if you override a context's configuration, your changes apply to all workflows using that context. As released, Provider Finder contexts are mapped to the following configurations:

Context	Default Configuration
20102-Default Context with Address	20103-Default Context with Address Default Configuration
20104-Referring Provider with Address	20105-Referring Provider with Address Default Configuration
20106-Visit Provider with Address	20107-Visit Provider with Address Default Configuration
20108-Referred to Provider with Address	20109-Referred to Provider with Address Default Configuration

Context	Default Configuration
20110-Recipient Selection with Address	20111-Recipient Selection with Address Default Configuration
20112-Continued Care Services with Address	20113-Continued Care Services with Address Default Configuration
20114-Deficiency Assignment with Address	20115-Deficiency Assignment with Address Default Configuration
20116-Referred To Provider with Location	20117-Referred To Provider with Location Default Configuration
20118-Referred To Provider with Dynamic Secondary Selection. Available starting in November 2022.	20119-Referred To Provider with Dynamic Selection Configuration
20122-Managed Care PCP with Location. Available starting in November 2023, in August 2023 with special updates E10602907 and E10601890, and in May 2023 with special updates E10509547 and E10508619.	20123-Managed Care PCP with Location Default Configuration
20124-Managed Care PCP with Address. Available starting in November 2023, in August with by special updates E10602907 and E10601890, and in May 2023 with special updates E10509547 and E10508619.	20125-Managed Care PCP with Address Default Configuration
20126-Managed Care PCP with Dynamic Secondary Selection. Available starting in November 2023, in August 2023 with special updates E10602907 and E10601890, and in May 2023 with special updates E10509547 and E10508619.	20127-Managed Care PCP with Dynamic Selection Configuration
20134-Billing Provider Selection With Address. Available starting in May 2025.	20135-Billing Provider Selection With Address Default Configuration

You can check the context a particular workflow is in by opening Provider Finder in the relevant workflow and then pressing the Shift key while clicking Cancel. You can see the context in the Administrator Information window that appears.



Customize Provider Finder's Appearance

After investigating which information should appear when performing searches in the listed contexts, you can make your own view configurations and activate them, or adjust any existing custom configurations to meet new needs.

The following setup requires Shared security point 272-Configure Provider Finder.

Create or Update a Provider Finder Configuration

To customize Provider Finder configurations:

1. Open the Provider Finder Configuration activity (search: Provider Finder Configuration).
2. Select an existing configuration you want to update, or click the Create tab and choose a configuration to copy. For example, if you want to customize Provider Finder's behavior when users select referred-to providers, copy from configuration 20109-Referred to Provider with Address Default Configuration.
3. Click Accept.
4. Customize the configuration as necessary, using the other topics in this section.
5. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
6. In the Configuration Overrides table, enter the context you want to update in the Context (I HDF 3240)

field, and your new configuration in the Configuration (I HDF 3241) field.

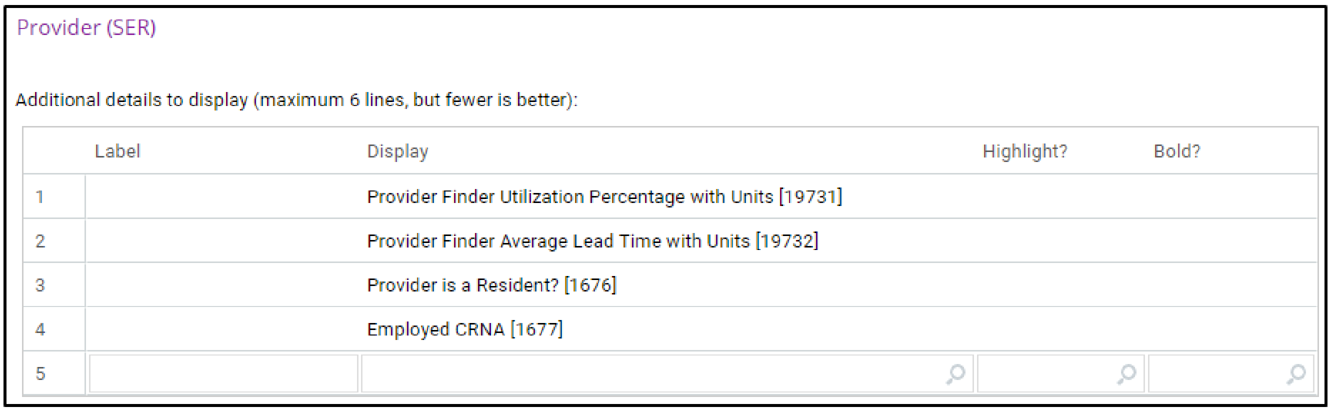
Choose the Information That Appears in Search Results

The information that appears beneath a provider's name in Provider Finder search results comes from columns based on values in the Provider (SER), Location (EAF), Department (DEP), and User (EMP) master files. The available columns include information like whether they are accepting new patients. You can search for columns relevant to you using the Find Report Column Report Template. Not all columns work in Provider Finder, though, so make sure to test any columns you add before making them available to your users.

Any columns you select from the Location (EAF) master file also appear in Location Finder searches using this configuration.

To add columns to a Provider Finder configuration:

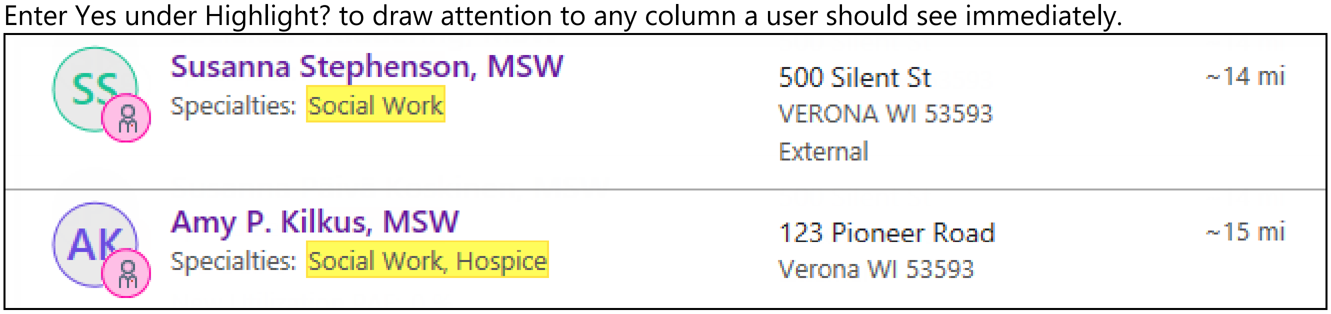
1. Open your copy of a Provider Finder configuration (search: Provider Finder Configuration).
2. In the Display fields of the Primary Selection Display tables, enter the columns users should see in this view configuration. For example, if you want to show specific information when the selected result is a clinician with an associated provider (SER) record, use the Display (I HST 20126) field in the Provider (SER) section.


Provider (SER)

Additional details to display (maximum 6 lines, but fewer is better):

	Label	Display	Highlight?	Bold?
1		Provider Finder Utilization Percentage with Units [19731]		
2		Provider Finder Average Lead Time with Units [19732]		
3		Provider is a Resident? [1676]		
4		Employed CRNA [1677]		
5				

3. Enter Yes under Highlight? to draw attention to any column a user should see immediately.



   - Starting in November 2022, you can set the Bold? field to Yes to make columns stand out in bold. For example, you might want to add a service provider program name as a bold subtitle underneath the organization name.

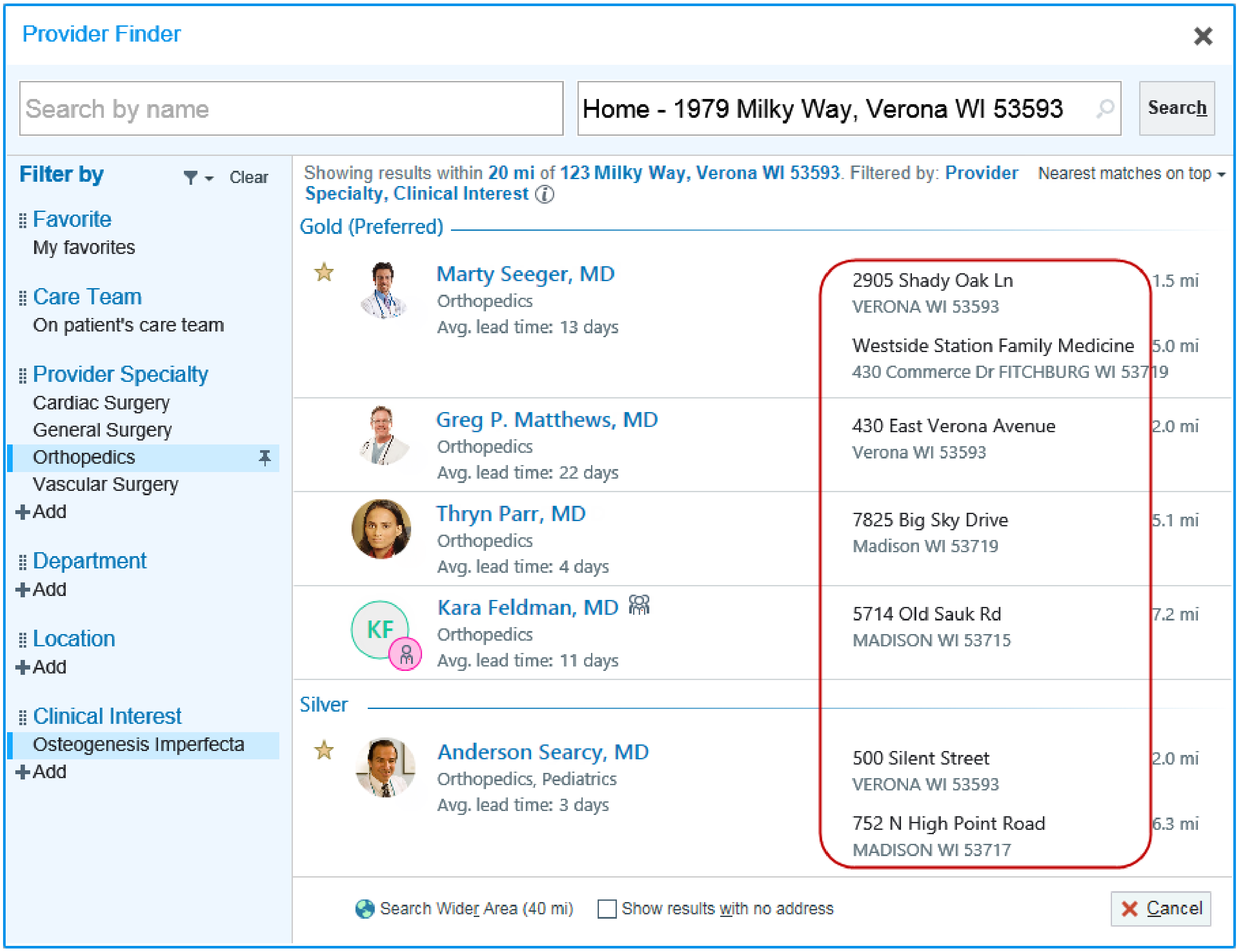
4. Enter a label for columns that might be confusing without context. These might be columns like 38310-Currently Out of Office?, which shows only Yes or No, or column 41652-Provider License, which shows only a number. If a search result doesn't contain a value for a particular column, Provider Finder hides its label.

Choose the Contact Information that Appears in Search Results

When a provider has associated addresses, those addresses appear on the right side of Provider Finder. If the location filter is used as well, only addresses that are associated with either the selected location or with no location appear here. If providers are appearing for the wrong location, refer to the Providers appear for the wrong location topic for steps to override which location is associated with an address.

You can also add extra contact information to this section, like the provider's email address or phone number. This extra contact information appears even when a provider doesn't have an associated address. Provider Finder also shows different information for each address, like associated phone numbers, if applicable.

The first piece of available information for an address appears in a larger font with a darker color. In the following example, an administrator has configured Provider Finder to show the name of the location associated with an address, if present, above the address itself. Dr. Seeger's address at 430 Commerce Drive has a corresponding location name, Westside Station Family Medicine, so it appears first for that address. But Dr. Seeger's other address, at 2905 Shady Oak Lane, does not have a corresponding location name, so the first line of the associated address appears first instead.



This setup also applies to Location Finder searches using this configuration.

To add additional contact information to a Provider Finder configuration:

1. Open your copy of a Provider Finder configuration (search: Provider Finder Configuration).
2. In the Secondary Selection Display section, enter an extension in the Title display (I HST 20127) field to show the corresponding information above the provider's address. The address appears first if this information isn't present.
    - For example, enter extension 24610-Provider Secondary Selection - Title to show the name of the location associated with an address.
    - Click the magnifying glass to see a list of available extensions.
3. In the Display (I HST 20130) field, enter up to three extensions to show the corresponding information below the provider's address.
4. Enter Yes in the Highlight? (I HST 20132) field to draw attention to any address item a user should see immediately.
5. In the Label (I HST 20129) field, enter a label for address items that might be confusing without context. For example, you might use Fax: and Phone: labels to differentiate between fax numbers and phone numbers. Provider Finder hides the label if the corresponding information isn't available.

Show Direct Addresses in Provider Finder

You can optionally show Direct addresses in Provider Finder. Note that Direct addresses look like email addresses, but only secure messages sent from your Epic system can be sent to them. These addresses are automatically used when sending a Direct message, and most organizations show other contact information in Provider Finder instead to help users select a provider. Users can't send an email to a Direct address.

To show Direct addresses in Provider Finder:

1. In Hyperspace, open the Provider Finder Configuration activity (search: Provider Finder Configuration).
2. Select the Create tab to create a configuration. Enter a name for the configuration, such as Recipient Selection with Address Default Configuration Including Direct Address.
3. In the Copy from field, enter 20111-Recipient Selection with Address Default Configuration. Click Accept.
4. Go to the Secondary Selection Display: Address section, IN the Display (I HST 20130) field, enter extension 24618-Provider Secondary Selection - Direct Address. Click Accept.
5. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
6. In the Configuration Overrides table, enter a context of 20110-Recipient Selection with Address. Enter your new configuration in the Configuration (I HDF 3241) field.

Choose How Provider Names Are Sorted

You can configure how Provider Finder sorts provider names independently of how they're shown. For example, you can show names in first name last name format but still sort them by last name. By default, provider names are sorted by last name and then first name.

This setting also affects the Care Everywhere external directory.

To configure how provider names are sorted:

1. In Hyperspace, open Provider Finder System Definitions (search: Provider Finder System Definitions).
2. In the General section, in the Name sort format (I HDF 3246) field, enter the format by which provider names should be sorted.

Enable More Sorting Methods for Users

Users can always sort their search results by name or relevance, which prioritizes user favorites, care team members, and recent selections. You can, optionally, make other sorting methods available, such as sorting by the city of the provider's primary address. Sorting by distance is available only after you complete the setup in the Enable Provider Searches and Sorting Based on Geodata topic. Sorting by provider utilization and average lead time is available only after you complete the setup in the Allow Users to See and Sort by Provider Utilization and Lead Time topic. Sorting by rating is available only after you complete the setup in the Show Local Quality and Cost Efficiency Ratings topic or if you receive provider ratings over Payer Platform.

If you've configured your system to automatically search near the patient's address or the user's login location, as described in the Prioritize the User's Location over the Patient's Address for Nearby Searching topic, Provider Finder always sorts by distance when users first open it. Otherwise, Provider Finder automatically sorts its results using the first listed sort method. If you use provider network levels, as described in the Point Users to Providers in Your Network topic, the default sort method applies only within each network level to keep your preferences front and center; each network level appears in order based on your preferences.

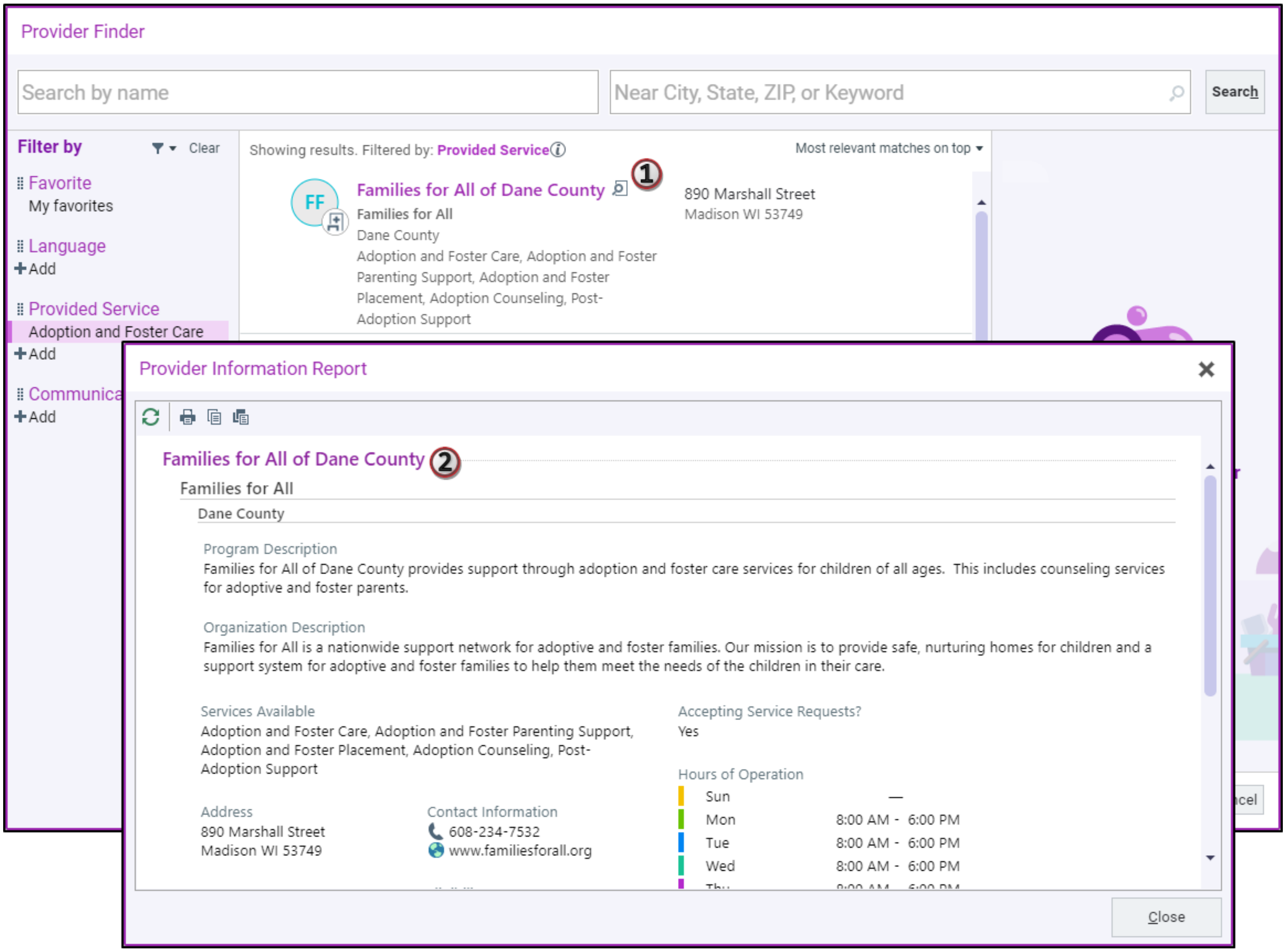
To make new sorting methods visible to users:

1. Open your copy of a Provider Finder configuration (search: Provider Finder Configuration).

2. In the Sorting section, enter a sort method in the Available sort values (I HST 20123) field. Some contexts support only certain sort methods.

Let Users View More Information for Search Results

You can let users click a preview icon to open a window with more information about a search result in Provider Finder. For example, a user can see a provider's contact information and specialties.



A user clicks the preview icon (1) to open a window with more details about the record (2)

Starting in November 2022, the report can show additional information to help users select appropriate service providers for patients. This includes additional details about the program being offered, the organization offering it, and whether the program is currently active.

Refer to the Import Records for Community Resources topic for information on how to work with your vendor to include this information in your facility import file so it appears on the report.

By default, the preview icon appears next to search results in the Community Resource Directory, which corresponds to Provider Finder context 20112-Continued Care Services with Address. You can have the icon appear in other contexts like 20104-Referring Provider with Address for any of the following types of records that appear in the search results:

- Provider (SER)
- Location (EAF)

- Department (DEP)
- User (EMP)

To add the preview icon:

1. Open your copy of a Provider Finder configuration (search: Provider Finder Configuration).
2. In the Primary Selection Display section, fill in the following fields depending on which type of records you want the icon to appear next to:
    - To add the icon to provider records, enter report 75757-Service Provider Details Report SER in the SER details report (I HST 20150) field.
    - To add the icon to location records, enter report 75755-Service Provider Details Report EAF in the EAF details report (I HST 20151) field.
    - To add the icon to department records, enter report 75756-Service Provider Details Report DEP in the DEP details report (I HST 20152) field.
    - To add the icon to user records, enter report 75758-Service Provider Details Report EMP in the EMP details report (I HST 20153) field.

Customize Location Finder

Like Provider Finder, you can customize the appearance of Location Finder using context and configuration records. Location Finder doesn't use its own contexts, but instead shares two contexts with Provider Finder:

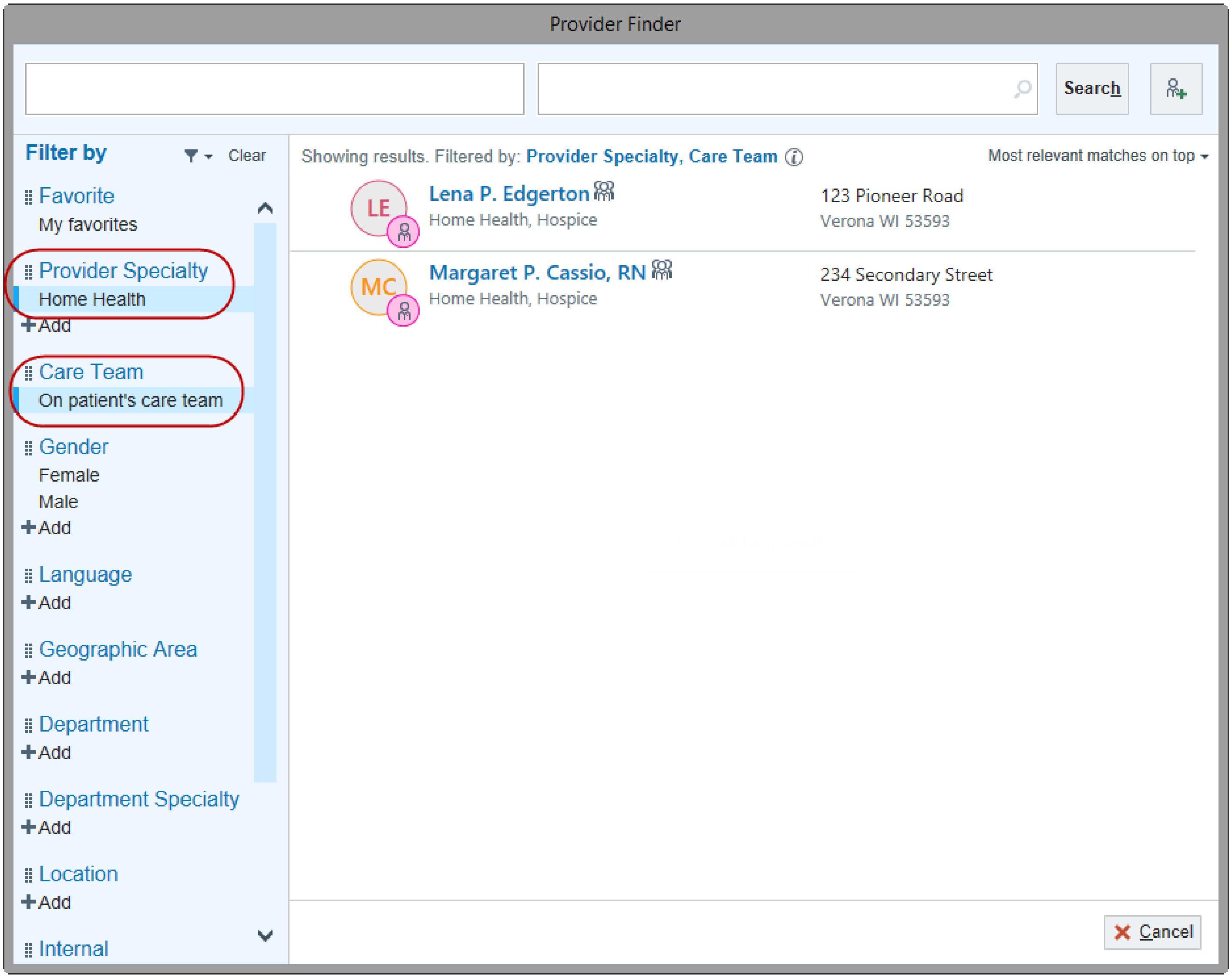
- 20104-Referring Provider with Address
- 20108-Referred to Provider with Address

If you want to customize the information users see when searching for locations, this also changes the information users see when searching for providers when these contexts are active. However, Provider Finder hides any information that's only relevant to location searching when users search for providers, and vice versa for information associated with provider searching in Location Finder, so you typically don't need to worry about showing irrelevant information in these contexts.

Follow the steps in the Customize Provider Finder's Appearance for Users topic to configure Location Finder for your users.

Hide Unnecessary Provider Finder Filters

When a user opens Provider Finder, they might be looking for a specific provider without knowing their name, like a home care provider on a specific patient's care team. That user can use filters, like the Provider Specialty and Care Team filters, to get the results they need.



Not all filters are useful to all organizations, so you might want to hide some of them. For example, if your organization doesn't always record your providers' gender (I SER 1340) in their demographic information, selecting Female in the Gender filter finds only providers with Female in their provider record, which doesn't include all female providers. In that case, you could hide the Gender filter to avoid showing misleading search results.

You can see the full list of potential filters by clicking the magnifying glass for the Filters to hide (I HDF 3243) field in Provider Finder System Definitions.

Considerations

Before hiding a filter, consider whether you can update your providers' information instead. These filters are often very useful when trying to match a patient's preferences, so we don't recommend removing them without first determining whether you can update your providers' records to include the relevant information. For example, instead of hiding the Language filter, you could survey your providers to determine the languages in which they're comfortable providing care and update the Languages (I SER 1350) item accordingly.

The more filters you provide, the more likely it is that your users can pick the right provider for each patient.

Hide Unnecessary Filters

To hide filters that aren't useful for your users:

1. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
2. Enter filters in the Filters to hide (I HDF 3243) field to hide them for all users.

> Hiding filters associated with Referred By/To fields in Referral Entry and Order Entry causes those fields to ignore restrictions set in Referrals System Definitions, as described in the Simplify Referred To Selection topic for authorization users and the Simplify Referred To Selection topic for clinicians. For example, if the Location/POS & Department (I POS 1658) item is set to Yes in Referrals System Definitions but the Location filter is hidden in Provider Finder System Definitions, then the department field will not be restricted by the selected location in Referral Entry and in Order Entry.

Hide Unnecessary Languages

When users use the Language filter during a search, they must select one or more languages. The search results then show only providers who have those languages listed in their demographic information.

If your organization is in one of the following English-speaking locales, Provider Finder already hides English as an available filter:

- Australia
- United Kingdom
- United States

This is because organizations in these locales are unlikely to record which of their providers speak English, and users would accidentally exclude too many providers from their results if they chose to see only providers listed as English speakers. The ability to filter by English speakers can always be made available if necessary.

Users in non-English-speaking locales should consider hiding other language filters. For example, organizations in Denmark are unlikely to record which of their providers speak Danish, and so a user in Denmark would unintentionally exclude too many providers when filtering on Danish. That same user, however, might need to be able to apply a filter limiting his results to providers who speak Spanish, so not all language filters should be hidden.

To hide individual language filters:

1. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
2. In the Filters section, enter individual languages in the Languages to hide (I HDF 3244) field to hide them for all users.

Configure Provider Finder for Order Entry in EpicCare Ambulatory

To use Provider Finder during referral order entry in EpicCare Ambulatory, complete these steps. If your organization is already live on Epic, you should already have configured your referral procedures and procedure categories to include the appropriate fields, but follow these steps to ensure users can see and enter the right information during referral order entry.

Ensure that referral orders contain the appropriate fields so users can access Provider Finder:

1. In Clinical Administration, go to Procedures, Scheduling.
2. Depending on whether you want to configure a procedure category or an individual procedure, select either Categories or Procedures.
3. Enter the category or procedure name at the prompt.
4. Go to the Order Composer Configuration screen.
5. In the Context (I EAP 24200 or I EDP 24200) column, locate or add a context of Ambulatory.
6. On the same row in the Configuration column (I EAP 24210 or I EDP 24210), enter the Order Composer configuration you want to appear when the procedure or category is ordered in an ambulatory setting.
7. With your cursor's focus on the Configuration column for the Ambulatory context, press F8 to edit the Configuration.
8. On the Procedure Items screen, add items 10-Priority, 12-Class, and 67-Referral Information to the Display Items (I OCC 2000) section. You can remove all other referral-related items from this section, if present.
9. Press Page Down to exit the configuration and return to the Order Composer Configuration screen of the procedure or category you were editing.
10. In the Context column, add three contexts: Internal Referral-Ambulatory, External Referral-Ambulatory, and Incoming Referral-Ambulatory. These contexts provide the default display item settings for the Order Composer for referrals from this procedure or from this procedure category. Each context applies to a different referral class.
11. For each referral class context, move the cursor's focus to the Configuration column and press F8 to create a new configuration on the fly.
12. On the Procedure Items screen, add the individual referral items you want to appear when the procedure, or a procedure from the procedure category, is ordered in an ambulatory setting. The referral items you specify here control what users see in ambulatory Order Entry due to the Referral Information item. You can configure different display items, item profiling, and summary items to appear based on the referral's class. We recommend the following items for each referral class:
    - Internal Referral-Ambulatory
        - 22-Referral To Department
        - 23-Referral To Department Specialty
        - 69-Referral To Provider
        - 25-Referral Reason
        - 26-Referral Priority
    - External Referral-Ambulatory
        - 21-Referral To Provider Specialty
        - 69-Referral To Provider
        - 70-Referral To Location/POS
        - 25-Referral Reason
        - 26-Referral Priority
    - Incoming Referral-Ambulatory
        - 22-Referral To Department

- 23-Referral To Department Specialty
- 69-Referral To Provider
- 25-Referral Reason
- 26-Referral Priority

13. Press Page Down to exit the configuration and return to the Order Composer Configuration screen of the procedure or category you were editing.
14. Press Shift+F7 to exit the procedure and save your changes.

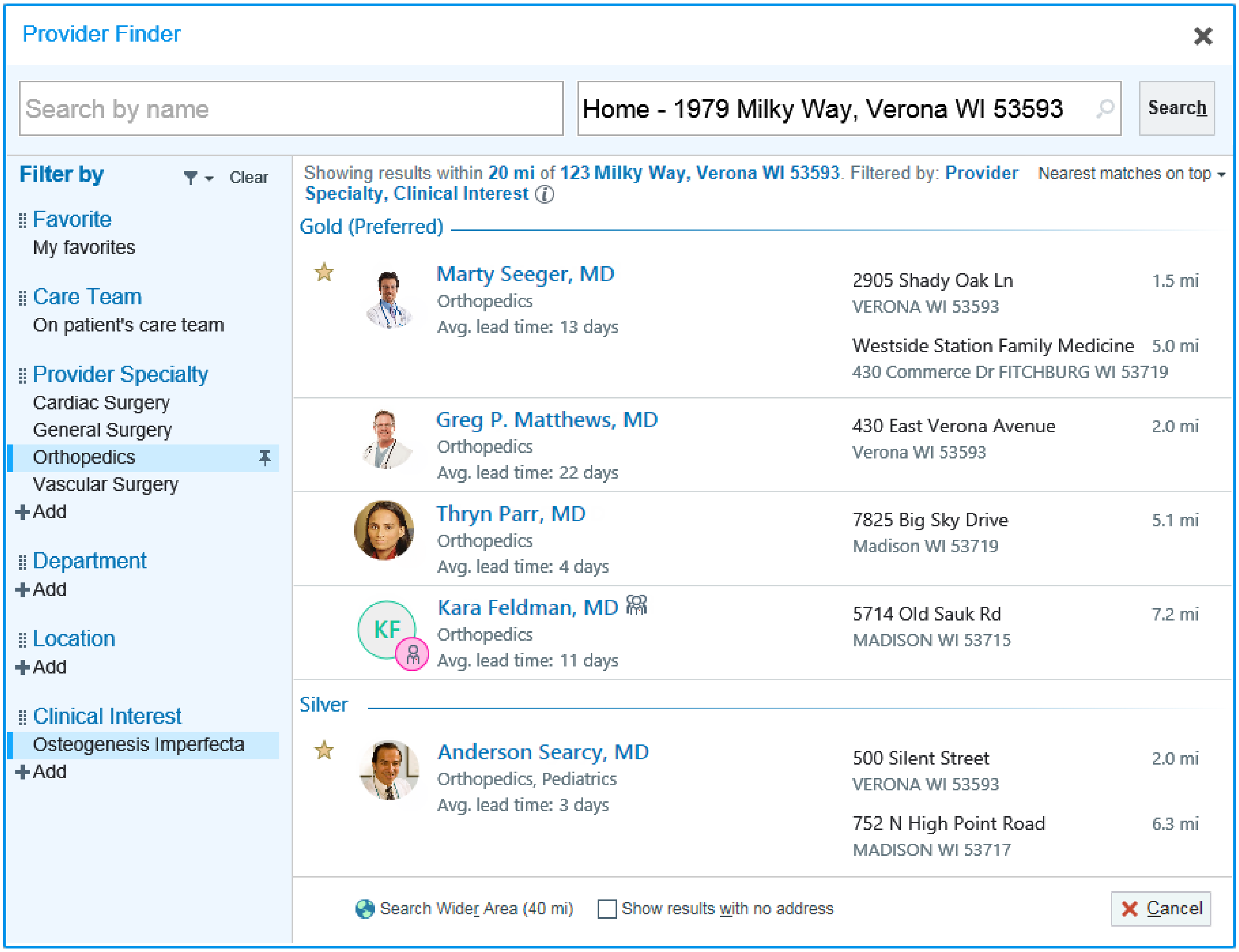
Configure Provider Finder in EpicCare Link, Tapestry Link, and Healthy Planet Link

To use advanced search options similar to Provider Finder in your web applications, follow the steps in the Set Up a Provider Search for Referred-To Providers topic.

Point Users to Providers in Your Network

Even on its own, Provider Finder is a great tool to help users find the right provider for each patient. But we also recommend grouping providers into networks and network levels, as described in the Provider Network Grouping Setup and Support Guide.

Provider Finder groups its results by network level when applicable, using the order you specified in the Determine the Order in Which Provider Finder Shows Network Levels topic. Any other sorting, such as by relevance or distance, still occurs, but inside each network level group, as shown in the screen shot:



If you don't perform this network level setup, Provider Finder doesn't group any providers based on their network level.

Provider Finder Setup: Bells and Whistles

In this section, we'll go over some optional tasks you can complete to customize Provider Finder's behavior.

Use Mnemonics to Search for Providers

Users can search for providers with more than just the provider's name in Provider Finder or any provider search field.

- Last record (mnemonic: =). The last record a user entered in this field is populated. The last selected address is not remembered, so if a provider has multiple addresses, users are still prompted to select an address.
- Community ID (CID). Users must prefix the Community ID with "CID.". For example, type "CID.11111111" to see the provider record with CID 111111111.
- MPI ID. Users must prefix an MPI ID with "MPIID.". For example, type "MPIID.11111111" to see the provider records with any MPI ID of 111111111. The MPI ID can be any numeric identifier saved as an MPI ID (I SER 9301).
- Current user (mnemonic: .ME). Providers can use this to populate their record in provider search fields.
- NPI. Enter the 10-digit NPI ID.
- PCP (mnemonic: .PCP). The patient's General PCP record is populated. Support for General PCP lookup varies by workflow.
- ID. To search by an alphanumeric ID, users must prefix the ID with "#".

Configure Definition of Internal Provider

Starting in November 2023

You can define which providers are included in the results when a user applies the Internal filter in Provider Finder. A provider can be considered internal based on one of the following methods:

- Flag on provider record. The provider is internal when the Access to EHR (I SER 21185) field is set to Yes on any active addresses.
- Service area. The provider is internal when their linked location or department is part of the service area associated with the user's login department. This is determined by first looking to the active departments (I SER 41) they work in (I SER 40), their locations (I SER 1600), and their addresses (SI SER 10000). If there is not a linked location in the provider's address (I SER 21420) then the system uses the Access to EHR (I SER 21185) field to determine whether a provider is internal.

To configure which providers are considered internal in Provider Finder:

1. In Hyperspace, open Provider Finder System Definitions.
2. Navigate to the Filters section.
3. Enter one of the following options in the Internal definition (I HDF 3247) field:
   - 0-Internal flag on provider record. This is the default setting when the field is blank.
   - 1-Service area based.

Allow Users to See and Sort by Provider Utilization and

Lead Time

As released, users can sort Provider Finder results by name and relevance, which prioritizes user favorites, care team members, and recent selections. Users can also sort by distance if you have completed the setup in the Enable Provider Searches and Sorting Based on Geodata topic.

If users in your organization have access to provider schedule information, which is available only for internal providers, you can also allow users to sort the providers in their results by:

- Utilization, which prioritizes providers with the most available upcoming time.
- Average lead time, which prioritizes providers who have a history of seeing patients sooner.

Perform this setup for each configuration where you want to allow sorting by utilization or average lead time:

1. In Hyperspace, open your copy of a configuration record (search: Provider Finder Configuration).
2. In the Display (I HST 20126) field in the Provider (SER) section, enter one or both of the following columns (PAF records), depending on the information you want to show users in this configuration. This information appears on the left side of Provider Finder. You can also use copies of these columns that have been configured to use different time periods or visit types:
   - 19731-Provider Finder Utilization Percentage with Units, which shows utilization data.
   - 19732-Provider Finder Average Lead Time with Units, which shows lead time data.
3. Enter Utilization, Average Lead Time, or both in the Available sort values (I HST 20123) field.
4. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
5. Depending on the sorting methods you want to be available, add one or both of the following options. Note that when a user sorts using one of these methods, the system hides the corresponding information on the left side of Provider Finder because that information subsequently appears in the sort column on the right side of Provider Finder:
   - To sort by provider utilization, enter Utilization in the Sort (I HDF 3250) field, and the corresponding utilization column from step 2 in the Display Column (I HDF 3251) field.
   - To sort by lead time, enter Average Lead Time in the Sort (I HDF 3250) field, and the corresponding average lead time column from step 2 in the Display Column (I HDF 3251) field.

Show Local Quality and Cost Efficiency Ratings

Starting in August 2024

If you use Tapestry, you can store provider ratings in Epic and show local quality and cost efficiency ratings in Provider Finder and in Provider Search in your Tapestry Link system. This allows referring providers to steer patients to highly rated and cost-efficient providers so they can receive the best care possible.

Prerequisites

Before you can show provider ratings in Provider Finder and Provider Search, you must store them in Epic. If you don't already do that:

1. Specify your maximum rating value for the ratings you maintain. Refer to the Define Your Maximum Rating Values in Epic topic.
2. Import ratings into your system using import specification CSF,1001-Payer Platform Cost and Quality Ratings Import. Refer to the Build Provider Ratings topic for more information.

To show local ratings in Provider Finder:

1. In Hyperspace, go to the Network Administration activity.
2. In the Local Ratings Settings section, set the Show local ratings (I HDF 18887) field to Yes.

To show local ratings in Provider Search in EpicCare or Tapestry Link:

1. Find your provider search context record by accessing the System (WSD) master file in Text and viewing your EpicCare Link or Tapestry Link system.
2. Under Provider Search Settings (I WSD 4600), view your Referral Provider Search Context (I WSD 4610) and take note of the HCZ record.
3. In Chronicles text, access the Context (HCZ) master file and open your Referral Provider Search Context record for editing.
4. Go to the Provider Search - Results screen.
5. Add the 66-Quality and 67-Cost Efficiency columns to the Provider Search Results Columns (I HCZ 1400).

For more information about configuring Provider Search, refer to the Set Up a Provider Search for Referred-To Providers topic.

Enable Provider Searches and Sorting Based on Geodata

Users can always perform searches in Provider Finder based on city, state, or ZIP Code. ZIP Code searching is available if you have performed the setup in the Determine Which Providers and Places Are Considered Nearby topic.

If you enable geodata functionality with assistance from a third-party geocoding vendor, you can also sort search results by their distance from a location, and configure searches to return nearby providers first by default. Provider Finder configurations already include distance as a default sorting method, so you don't need to add it to a custom configuration after enabling geodata in your system.

For more information on geocoding options and setup, including selecting a vendor and uses for geodata in activities other than Provider Finder, consult the Geodata Setup and Support Guide. For example, you must enable geocoding features for workflow 1-Provider Finder as described in the Configure Geocoding Thresholds by Workflow topic.

Prioritize the User's Location over the Patient's Address for Nearby Searching

By default, nearby searching in Provider Finder prioritizes providers and places near the patient's addresses over providers and places near the user's login location. Provider Finder searches for the following patient addresses and uses the first one it finds:

- Patient's temporary address
- Patient's home address
- Patient's work address

If none of these addresses are filled out for the patient, Provider Finder searches for providers and places near the user's login department address or login facility address. Refer to the Configure Geocoding Thresholds by Workflow topic to setup geocoding for Provider Finder. Users can still manually change the location, no matter how the default nearby search method is configured.

For example, if a patient has a temporary address, that appears as the default selection. If he doesn't have an active temporary address but does have a home address, the home address is the default selection. Users can still use the Near field to search for locations near a city, within a state, or near a ZIP Code. Provider Finder returns nearby results based on geocoded data for city and ZIP Code searches, and it returns all matching facilities in a state for state-based searches. Refer to the Update ZIP Codes topic to ensure you are keeping your ZIP code information up to date with yearly imports.

If you instead want Provider Finder to prioritize a user's login location over a patient's address when the user searches for providers and places, you can change the default option. As an alternative, you can configure Provider Finder to not search near any location by default, and instead have users select a location. This feature is configured at the profile level.

Before deciding which option to use, work with the teams that use Provider Finder, including Clinical Case Management and Referrals, to determine whether the option makes sense for their workflows. You can specify a different default search method to use for different contexts, such as when a user is searching for a referring provider versus a visit provider. Review the available contexts in the Provider Finder Context (I LPR 96100) field to determine whether a team shares the contexts that they use with other teams.

To set up default search methods:

1. In Clinical Administration, go to Users, Providers > Profiles (LPR). Open the profile record you need to change.
2. Go to Specialties, Other Modules > Provider Finder.
3. Complete the setup for your version:
   - In the Provider Finder Context (I LPR 96100) field, enter a context for which you want to configure a default search method. In the corresponding row in the Default Nearby Search Method (I LPR 96101) field, enter the search method that you want to use in this context.
   - Starting in May 2024, you can configure the default radius (I LPR 96102) field for Provider Finder contexts within a User Profile.

Choose Where a Provider Address Appears by Default

Save users clicks when they make a provider selection in Provider Finder by automatically entering the primary address associated with that provider. You can make the address appear by default for both the selected referred to provider and the selected referred by provider. Users can still edit the address that’s automatically entered if they need to.

You must have completed the setup described in the Configure Provider Finder for Order Entry in EpicCare Ambulatory topic if you want Provider Finder to automatically enter provider addresses when used for a referral order entry.

If you're using the Networks and Ratings Exchange module of Payer Platform, which is available starting in February 2023, enabling this setting means that if a provider has addresses for multiple networks, the provider appears in the network grouping for only the network that is associated with their primary address. The provider does not appear in groupings for any other of their associated networks.

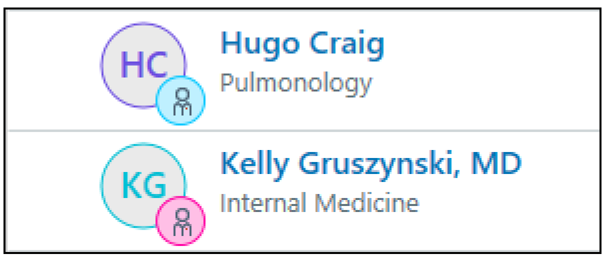
To configure where a provider's primary address appears by default:

1. In Hyperspace, open Referrals System Definitions (search: Referrals System Definitions) and go to the Networks > Lookup Configuration form. (In November 2023 or earlier, navigate to Networks > Search Settings).
2. In the Default primary address for contexts (I POS 3668) field, enter the contexts where you want the provider's primary address to appear by default.

Make Provider Photo Placeholders Gender-Neutral

Provider Finder includes provider photos or photo placeholders in search results:

- If you have already completed the setup described in the Display Provider Photos and Web Pages topic, the provider photos you created appear throughout Provider Finder.
- For providers without associated photos, Provider Finder shows photo placeholders containing pink and blue gender indicators. Providers without a listed gender use a white indicator. The colors in photo placeholders don't have any special meaning. Provider Finder uses different placeholder colors to make it easier for users to focus on a single line in the search results.



If you want to change this behavior and make all photo placeholders appear with a white indicator, regardless of provider gender:

1. Open Provider Finder System Definitions (search: Provider Finder System Definitions).
2. In the Indicate gender? (I HDF 3245) section, click No.

Show Other Provider Identifiers

If you want to show specific types of provider IDs, such as a National Provider Identifier (NPI), you can do so.

To show a provider's NPI ID, add column 19710-Provider NPI to the Provider (SER) section of a configuration record, as described in the Customize Provider Finder's Appearance for Users topic.

To show any other type of MPI ID, as described in the Create ID Types topic:

1. In Chronicles, open the Extension (LPP) master file.
2. Copy extension 17652-Provider MPI ID and configure its parameters as follows:
    - 1-MPI Enabled INI. Enter the INI of the master file used by the desired ID type. For example, enter SER.
    - 2-ID. Do not edit this parameter.

- 3-MPI ID Type. Enter the ID type (IIT record) you want to show.

3. In Hyperspace, open the Column Editor (search: Column Editor).
4. Select the Create New Column tab and create a new column, copying from column 19688-Provider MPI ID.
5. In the Text Ext (I PAF 60) field, enter your copy of extension 17652.
6. Add your column to the Provider (SER) section of a configuration record, as described in the Customize Provider Finder's Appearance for Users topic.

Configure Vendor Defaulting through Provider Addresses

Starting in November 2023

August 2023 by SU E10600294, E10600295

May 2023 by SU E10506893, E10506894

To save UM staff the effort of manually adding vendors to referrals, Provider Data Management staff can associate vendors with an address based on a given provider through the Provider activity, accessed through the Tapestry Administration menu hierarchy. The system uses these vendors to calculate network levels. Then, when UM staff select a provider, the vendor associated with that provider automatically populates based on the selected address.

If a referral's dates fall outside the effective date range used in the Vendor Associations form of the Provider activity, as set by PDM administrators, the system does not use the vendor associated with that provider because it is no longer considered in network. If there is a location or place of service linked to the provider and the vendor comes from the provider address, the location or place of service linked to the provider overrides the referred to location or place of service for the purpose of restricting the vendor.

To learn more about using vendors, refer to the Network Associations Setup and Support Guide.

To use the vendor to calculate the network level of the authorization:

1. Go to Referrals System Definitions.
2. Go to the Networks form > Lookup Configuration.
3. Set the Default referred to vendor and use it to calculate network level (I POS 1650) field to 1-Yes.

This feature is available in Hyperspace and Tapestry Link. To enable it, contact your Epic representative and mention parent SLG 8737852.

Configure Separate Provider Address Lines Based on Vendor Associations in Tapestry Link

Starting in November 2023

August 2023 by SU E10600285

May 2023 by SU E10506624

In Tapestry Link, the Provider Search activity within Referral Entry shows providers grouped separately based on their respective vendors and addresses. This helps Tapestry Link users find the appropriate provider by intuitively organizing providers by their practicing addresses.

Vendor defaulting occurs for all provider addresses that are in network. If a provider has a vendor, the vendor appears by default even when the address is not in network. If the provider is in network but the specific address is not, the system does not group providers and addresses separately. Providers are grouped separately from vendors and addresses under the following conditions:

- When there is only one vendor associated with the provider, addresses are split by vendor.
- When the address is linked to a vendor that appears in the Network Associations table, addresses are split by vendor.
- When there is a specialty/POS specified in the Network Associations table, addresses are split by specialty/POS.

If these criteria are not met, Provider Finder shows one line per address per provider.

To enable this feature, contact your Epic representative and mention parent SLG 7922502.

Limit Provider Addresses by Lines of Business

Starting in May 2025

February 2025 by SU E11304729

November 2024 by SU E11209739

August 2024 by SU E11112718

You can configure the Provider Search activity within Referral Entry to separate provider addresses only for specified lines of business. For organizations with different referral address requirements per line of business, you might want split provider addresses on referrals for members with a coverage in a specified line of business, rather than splitting addresses by location. In Tapestry Link, when creating a referral, a member's coverage is evaluated for the line of business (LOB) and then the split method is determined based on that LOB.

To specify which lines of business to include for provider address splitting:

1. In Text, access the EpicCare Link and Tapestry Link System Definitions.
2. Navigate to the Split Address by LOB Settings screen.
3. In the LOBs to Split by Address (I WSD 4256) field, enter the lines of business for which provider addresses should be split.

To customize the information that appears to users when splitting addresses by line of business, you can create a context (HCZ) record to configure what information shows in Referral Entry. To create a context record:

1. In Chronicles, open the Context (HCZ) master file and create a new context.
2. In the Context Type (I HCZ 100) field, enter Provider Search.
3. Go to the Provider Search - Fields screen.
4. In the Search Fields (I HCZ 1100) column, list the report columns (PAF) you want to appear in the Referral Entry activity.
5. Page down to the Provider Search - Results screen.
6. In the Results Columns (I HCZ 1400) field, list the report columns (PAF) you want to appear in the results table.
7. After you create your context record, enter it in EpicCare Link and Tapestry Link System Definitions:
    a. In EpicCare Link and Tapestry Link System Definitions, go to the Enrollment Settings screen.

b. In the Results Columns Context (I WSD 4257) field, enter your context record.

Provider Finder: Common Issues

This section describes common issues that you might encounter, along with possible solutions for addressing each issue.

Care Teams and PCP Provider Finder Results Are Different

Solution

The list of possible PCP choices that appear in search results can be restricted by an extension in PCP Filter Selection (I HDF 3215). For example, you might not want users to select residents as PCPs.

Review the extension set in the PCP Filter Selection (I HDF 3215) field on the Care Teams Provider Filters screen of your Shared Configuration record. The field accepts extensions of type 18039-PCP Filter Selection. For more information and available restriction options, see the Restrict Which Providers Can Be Selected As PCPs section.

Users can't see certain referred to providers in Provider Finder.

Solution

If Provider Finder doesn't show a provider that one of your users expects to see, there are multiple potential causes:

- The relevant provider record contains missing or incorrect specialty information. If the user searched for providers with a specialty of Cardiology, but the relevant provider record doesn't list Cardiology as a specialty, that provider won't appear. Update the provider's specialties (I SER 1051).
- If the user entered a department or department specialty during their search, the provider might not be linked to that department. Similarly, the department might not use the expected specialty. Update the necessary department information (I SER 40 or I DEP 110).
- When searching for a provider, the user indicated that they wanted a provider of a certain gender, or who spoke a certain language. If that gender or language isn't included in the relevant provider record, that provider won't appear in the results. Update the provider's gender (I SER 1340) or languages (I SER 1350).
- Applies only if you group providers by network:
  - The provider isn't in the right networks, or uses an incorrect network level. If your staff forgot to add networks to a new provider at your organization, that provider will likely appear out of network in Provider Finder, and therefore appear after providers in all other network levels. Similarly, an internal cardiologist with an incorrect network level won't appear with other cardiologists who have the correct network level. Update the provider's network configuration as described in the Assign Network Level Settings and Network-Specific Levels to Providers topic.
  - You enabled different network level lists for different referral classes, and the current referral's class isn't associated with that provider's network level. Refer to the Set Network Level Precedence Based on Referral Class topic for more information.
    - Depending on your organization's referral ordering workflows, this behavior might be correct. For example, you likely don't want your users to see external providers for internal referrals, or vice versa. You might need to train the user about the differences between the providers available for each referral class.

        - If this behavior isn't correct, update your network level precedence list for the relevant referral class.
    - The provider is out of network and the user doesn't have the appropriate security, as described in the Give Users Security to Select Out-of-Network Providers topic. Even if the provider is correctly out of network, we recommend giving all relevant users the ability to select these providers.

Providers appear multiple times in Provider Finder.

Solution

Applies only if you group providers by network.

Starting in Epic 2018: Provider Finder lists providers multiple times if their addresses correspond to multiple network levels. Users can always pick the best address for the patient's needs, but might ask about an address at a more preferred network level first.

In Epic 2017 and earlier versions: When the Default location/POS data in Referral and Order Entry (I POS 3671) check box is selected in Referrals System Definitions, Provider Finder lists each provider in all their associated locations. This location information comes from the Location (I SER 1600) item in the provider record. If this check box is selected, when a user selects a provider at a specific location using Provider Finder, the system automatically populates that location information in the referral. At organizations that want to capture referred to location information, this saves time for your referrals users.

Epic's recommendations for addressing this issue depend on how you want Provider Finder to work:

- If you want to maintain your current behavior and keep pulling providers' locations into referrals when users select them in Provider Finder, don't disable this setting. Instead, determine whether you can clean up the locations listed in your provider records. If any provider records contain inaccurate or extra locations, remove them so users see only the relevant locations for each provider.
    - Users can also select the "Single provider per level" check box in Provider Finder itself to see only a single location for each provider. When a provider has more than one associated location, Provider Finder shows the location (EAF) with the lowest record ID. This user-level check box works independently from the check box in Referrals System Definitions.
- If it's more important that clinicians see each provider once, you can disable this setting, although your referrals staff will likely need to manually select the appropriate location for each referral as part of their core work if you require referred to locations for your referrals.
    - Tapestry organizations should consider leaving this setting enabled if one or both of the following are true:
        - You want referrals to have associated locations/places of service to make referral-claim matching easier during claims adjudication.
        - Some providers have different network levels depending on their location.

Users can't see any providers in Provider Finder.

Solution

Applies only if you group providers by network.

There are two main reasons why your users might not see any providers:

- The patient's network doesn't include any in-network providers and the user doesn't have Referrals security point 15-Select Out of Network Referred To Providers. For example, if you started to create a network for a specific payer but didn't update any provider records to use that network, no providers are technically in-network. When a patient with a coverage from that payer is seen at your organization, Provider Finder identifies that in-progress network but (correctly) doesn't find any in-network providers.

  - To address this, update the relevant network so it no longer applies to any patients or coverages. You can do this by removing any payers or plans from the Member Associations form and clearing both the "All providers included in this network?" and "All payers assigned to this network?" fields.

- The patient doesn't have a coverage and the relevant network isn't configured to include patients without coverages.
  - If your organization uses only a single network, add extension 18472-Indemnity Coverage Check to it as described in the Create Networks topic.
  - If your organization uses multiple networks, you likely need to update the rules you're using to determine network eligibility to include self-pay patients.

Providers appear for the wrong location.

Starting in August 2018

Solution

Automatic linking of provider and location records can't account for unique cases where the provider's address matches an associated location's address, but the provider's address shouldn't be linked to that location. In these scenarios, you need to override the automatically calculated location:

1. In Hyperspace, open the affected provider record (search: Provider).
2. On the Demographics form, click Edit Address.
3. Select the affected address in the Addresses table.
   - If you have a specific location that the address should be linked to instead, enter it in the Location override (I SER 21300) field.
   - If you don't have a specific location that the address should be linked to instead, but it shouldn't be linked to the automatically calculated location, enter Yes in the Disable location link? (I SER 21421) field.