

# IT EPIC REVENUE CYCLE TRAINING

## Tip Sheet

### Topic: Adding New Providers into Epic

- Effective **June 26, 2023**, the existing “**COOPER REFERRING PROVIDER & PCP FORM**” will be retired and replaced with a new provider enrollment tool integrated into Epic named **Symplr**.
- You will now be required to use the new tool to add new providers into Epic who are currently **NOT** available in the **Referring Provider, PCP, and other Care Team Member** fields. The name assigned to the new tool in Epic is **PHYND PROVIDER DATA CONNECT (PHYND)**.
- Once you complete the new provider enrollment process, you will **immediately** be able to find that provider in the Referring Provider, PCP, and other Care Team Member field category lists **eliminating** the need to complete the current **MI PHYSICIAN, NOT ON FILE** workflow.
- If you are unable to locate the provider after searching with two methods listed below, you will follow the existing workflow to add **MI PHYSICIAN, NOT ON FILE** into the selected field but will now submit your request to have the provider added into Epic in **Service Now**. Request Name: **COOPER REFERRING PROVIDER AND PCP FORM**.

### Workflow Description:

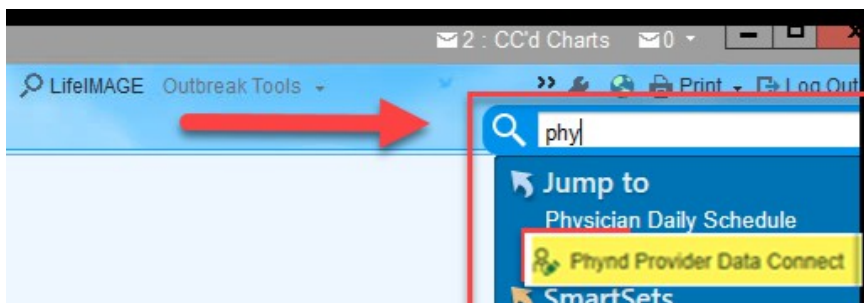
Prior to beginning the search, you will need to obtain the provider details listed below from the script, the patient (or designated representative).

1. Provider NPI: [Link to NPI Registry [NPPES NPI Registry \(hhs.gov\)](https://www.hhs.gov/nppes)]
2. Provider Name: **(Correct Spelling)**
3. Provider Address, City, State & Zip Code
4. Phone # **(Required)**
5. Fax # **(Required)**

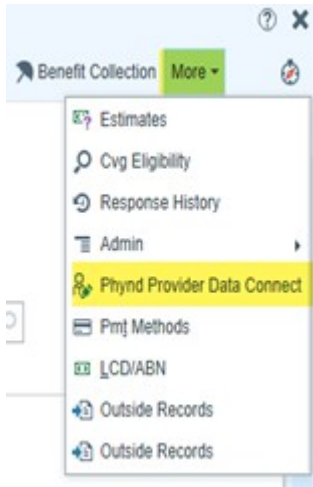
### Accessing the ‘PHYND Provider Data Connect (PHYND) tool:

You can quickly access the new tool searching with the name assigned of ‘**Phynd Provider Data Connect**’ at any time during your workflow in two different ways.

1. Using the Search option located to the top right of your screen and typing in name tool name, or



2. Clicking the **More** button located in any of your activity tool bar menus.



3. Once the activity is opened you will enter your search criteria into the screen.

## Search using the National provider Identifier (NPI):


1. The BEST way to search for a provider is with the provider's NPI number as it will result in 1:1 match if provider NPI is the new Epic tool.
2. You can obtain the NPI from the Prescription or by clicking this link to search the NPI Registry: [NPPES NPI Registry \(hhs.gov\)](https://www.hhs.gov/nppes).
3. Search for the provider by [1] entering the First Name and Last Name.
4. If the provider located, [2] copy the NPI Number to past into Epic tool.

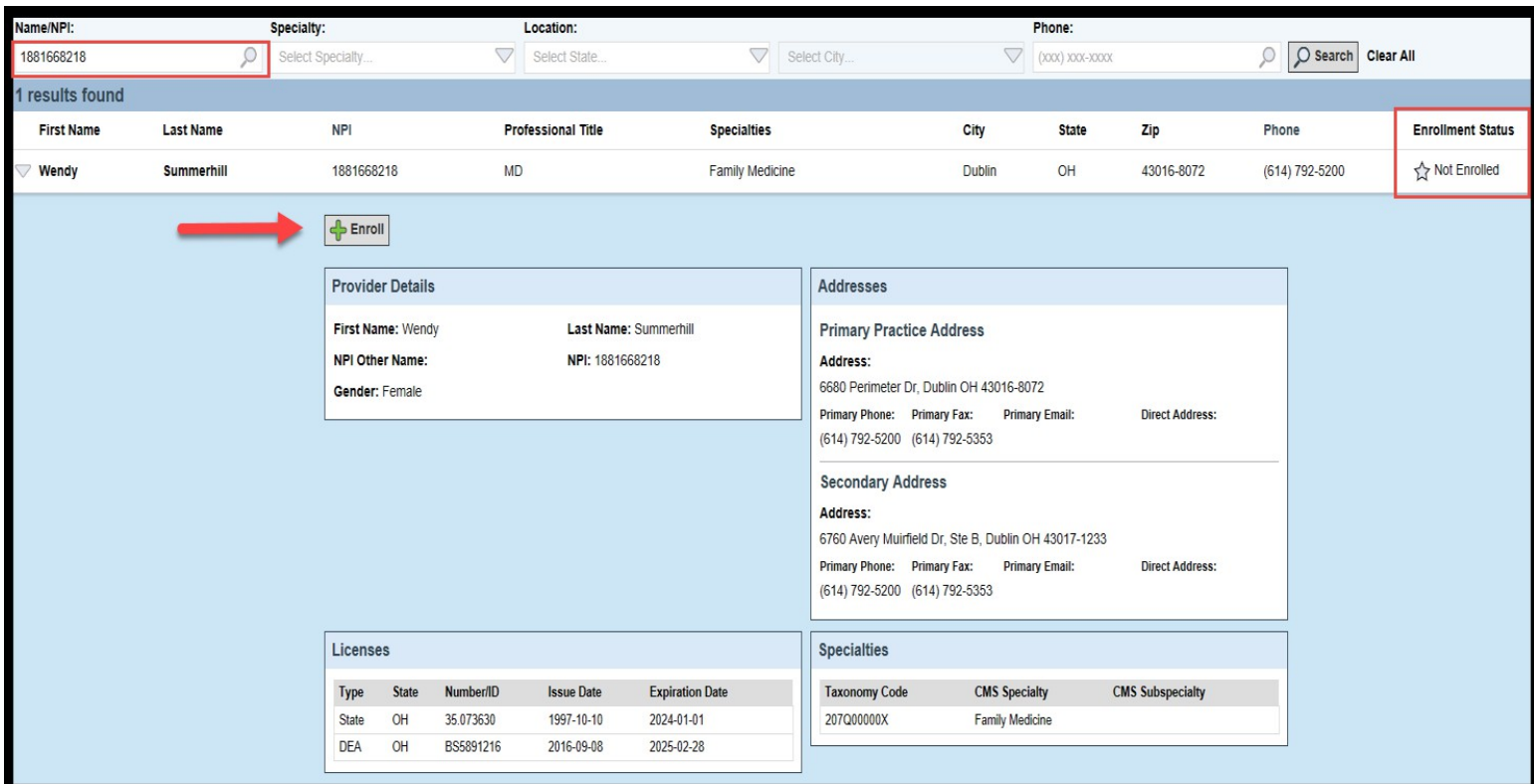


### Search NPI Records

 A screenshot of the NPI Registry search form. The form has a title 'Search NPI Records' and a search button. There are three main input fields: 'NPI Number', 'NPI Type', and 'Taxonomy Description'. Below these, there are two more input fields: 'Provider First Name' and 'Provider Last Name'. A blue box with the number '1' is placed over the 'NPI Type' and 'Taxonomy Description' fields, with an arrow pointing to the text 'Search by Provider First Name and Provider Last Name.' Another blue box with the number '2' is placed over the 'NPI Number' field, with an arrow pointing to the text 'If provider located, copy the NPI Number to paste into Epic.'


5. Open the PHYND tool in Epic and paste the NPI number into the Name/NPI: field and hit the Enter.
6. If the provider NPI is located, you will see columns that include the provider's name, NPI, Professional Title, Specialty, City, State, Zip, Phone and Enrollment Status.
7. If the Enrollment Status shows 'Enrolled' the provider is already in Epic and you need to return to your workflow and perform another search.
8. If the Enrollment Status shows as 'Not Enrolled', you can continue the enrollment process.

9. Scroll down the screen and review the Provider Details, Addresses, Licenses and Specialties listed for this provider.
10. Click the Enroll button  to add the Provider into Epic.



1 results found

First Name	Last Name	NPI	Professional Title	Specialties	City	State	Zip	Phone	Enrollment Status
Wendy	Summerhill	1881668218	MD	Family Medicine	Dublin	OH	43016-8072	(614) 792-5200	☆ Not Enrolled



**Provider Details**

First Name: Wendy      Last Name: Summerhill

NPI Other Name:      NPI: 1881668218

Gender: Female

**Addresses**

**Primary Practice Address**

Address: 6680 Perimeter Dr, Dublin OH 43016-8072

Primary Phone: (614) 792-5200    Primary Fax: (614) 792-5353    Primary Email:    Direct Address:

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**Secondary Address**

Address: 6760 Avey Muirfield Dr, Ste B, Dublin OH 43017-1233


Primary Phone: (614) 792-5200    Primary Fax: (614) 792-5353    Primary Email:    Direct Address:

**Licenses**

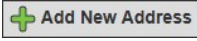
Type	State	Number/ID	Issue Date	Expiration Date
Slate	OH	35.073630	1997-10-10	2024-01-01
DEA	OH	BS5891216	2016-09-08	2025-02-28


**Specialties**

Taxonomy Code	CMS Specialty	CMS Subspecialty
207Q00000X	Family Medicine	

11. The **Enroll Provider** page displays with the address(es) currently on file. You can use the Edit button  to make corrections or add any missing information, e.g., update street address, add/update Primary Fax# **[Note: A Fax # is required for accurate results routing.]**

**\*\*DO NOT OVERRIDE OR REMOVE THE ADDRESS INFORMATION ON FILE\*\***

12. If the address information you received does not match with the one(s) on file, use the **Add New Address**  button to add a new address to the record.

13. When you are ready to continue, click the **Enroll Provider**  button to complete the enrollment process. The new provider is now available for selection in Epic.

### Enroll Provider

## Wendy Summerhill - 1881668218

Modify the Addresses listed below as needed to associate with the Enrolled Provider.

**Primary Practice Address**

**Address:**  
6680 Perimeter Dr, Dublin OH 43016-8072

Primary Phone: (614) 792-5200      Primary Fax: (614) 792-5353      Primary Email:      Direct Address:

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**Secondary Address**

**Address:**  
6760 Avery Muirfield Dr, Ste B, Dublin OH 43017-1233

Primary Phone: (614) 792-5200      Primary Fax: (614) 792-5353      Primary Email:      Direct Address:

14. Click the **X** located to the top right of the screen to exit the **PHYND** tool and continue your workflow required to add the new provider into the Referring Provider, PCP or other Care Team Member fields as needed.

## Search by Provider Name

1. If you do not have the NPI, it is **strongly recommended** that you perform your search by entering as much information as possible into the search columns provided to reduce the number of potential matches you receive.
  - a. **Minimum requirements: Provider Name, Location, and Phone Number**
2. The system will search by both the first name and last name and will return a list of all providers whose name includes either part of the name as seen in the screen shot listed below. Therefore, you will need to review the list carefully to locate the provider for whom you are searching.

Columns can be sorted by alpha or number by selecting top of column header.

**Search Providers**

9873 results found

First Name	Last Name	NPI	Professional Title	Specialties	City	State	Zip	Phone	Enrollment Status
▶ Wendy	Summerhill	1881668218	MD	Family Medicine	Dublin	OH	43016-8072	(614) 792-5200	☆ Not Enrolled
▶ Wendy	Copeland	1982847174	PA	Physician Assistant	Valdosta	GA	31602-2567	(229) 244-1400	☆ Not Enrolled
▶ Wendy	Flores	1982771721	CRNA	Nurse Anesthetist, Certified Registered	Fontana	CA	92335-6720	(909) 427-3910	☆ Not Enrolled
▶ Wendy	Neloms	1992272884		Community Health Worker	Bartow	FL	33830-6736	(863) 519-0575	☆ Not Enrolled
▶ Wendy	Amezcu	1982854865	PA	Physician Assistant	Fontana	CA	92336-4014	(909) 355-1296	☆ Not Enrolled
▶ Candace	Summerhill	1144507716	PHARM	Pharmacist	Little rock	AR	72204-6018	(501) 568-1486	☆ Not Enrolled

- In this example, we are searching for the provider, Wendy Summerhill, and able to confirm it is correct by referencing the information we entered in the search fields.

Columns can be sorted by alpha or number by selecting top of column header.

Search Providers

Name/NPI: wendy summerhill    Specialty: Select Specialty...    Location: Select State.. Ohio    Select City: Ohio    Phone: (xxx) xxx-xxxx (614)792-5200    Search    Clear All

9873 results found

First Name	Last Name	NPI	Professional Title	Specialties	City	State	Zip	Phone	Enrollment Status
Wendy	Summerhill	1881668218	MD	Family Medicine	Dublin	OH	43016-8072	(614) 792-5200	☆ Not Enrolled

- If the provider found in the new tool, go to the Search NPI section listed above and follow steps starting with #8 and ending with #14 to complete the enrollment process.

## Provider Not Found in PHYND

- Follow the existing system workflow to add the **MI PHYNO [MI PHYSICIAN, NOT ON FILE]** placeholder into the **PCP, Other Care Team Member or Referring Provider** fields and enter the provider details into the free-text sections provided. (See screen shots below)

Provider Finder

MI    Search

Filter by    Clear

- Favorite
  - My favorites
- Care Team
  - On care team
- Provider Specialty

**The search was stopped.**  
Try entering more specific search criteria.

Showing results for "MI"    Sort by: Relevance

	<b>Mi Imaging Provider, Not On File</b>	2 Stone Harbor Blvd CAPE MAY COURT HOUSE NJ 08210
	Mi Park	

**Note: DO NOT use the PHYSICIAN, NOT ON FILE option, this will cause the auto triggered result to go to the hospital in error!!!!!!**

## Referring Provider - PHYNO

**Appointment Information**

**NEW PATIENT VISIT NO B2B**  
at **1:00 PM** (20 min)

Tuesday June 6, 2023  
Aberdeen, Drew in NKS CFM CHERRY HILL

Appointment Type: **Outpatient**

Accident Related: **No** **Yes**

Referring Provider: **MI PHYSICIAN, NOT ON FILE**

Alternate Referring Provider:

Bill Area:

Click the pencil to open the page to enter the provider details.

2. Go to **Service Now** to complete and submit the **Cooper Referring Provider and PCP Form**; the request form will include all the same fields included in the current email form.
3. It is important that you review the information entered in the request for accuracy and completeness, i.e., correct spelling of provider name, NPI #, and location; and telephone #.
4. Your request will be assigned to the appropriate IT team for follow-up.
5. You will receive email notification confirming your request is complete and the provider available in Epic.
6. Go immediately to the patient's record and update the **PCP, other Care Team, and/or Referring Provider** fields with the correct provider.

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### Contact Information:

1. For system workflow questions, please forward an email to the [Epic Revenue Cycle Training Team](#).
2. Please call the Help Desk **only** if you experience any system related issues.