

# AN EFFORTLESS APPROACH TO MANAGING YOUR PROVIDER DIRECTORY IN EPIC®



## *Why Is Managing Provider Data So Tough?*

A typical acute care hospital maintains a directory of 50-100K healthcare providers. Epic® displays this information to its users through “**Provider Finder**.” They can then register a patient’s PCP at intake to send referrals, transitions of care, and many other routine communications.

Unfortunately, the data changes frequently. Over one-quarter of providers change organizations or locations each year, and many others change their fax, phone, or direct addresses. For a hospital managing an EHR directory of 50,000 entries, approximately 12,500 must be updated annually (34 per day!). That doesn’t account for adding new providers when users can’t find who they are looking for (the “**Provider On The Fly**” process).

*A poorly maintained directory leads to compliance issues or PHI breaches. And both Epic Analysts and EHR users are fatigued by manual processes or workarounds to get the information they need to contact the right person.*

Most hospitals running Epic tackle this problem in two ways:

1. They load multiple directory files from Epic, their HISP, and other sources (often 30-40 files per month) and use the Epic “**Compare Process**.” Done right, this takes the equivalent of 1 FTE Analyst to make sure they don’t duplicate or add invalid data in the Epic directory.
2. They manually review and validate data and respond to user requests through the Provider on The Fly process. This effort also consumes the time of another FTE Epic Analyst.

## The Epic Process

### DATA SOURCE LOAD

Epic has created a robust, well-thought-through process for loading directory data. But it is time-consuming for many hospitals. The standard process includes:

1. **Formatting:** All imported data must be formatted using a standard Epic CSV template. This can be difficult since many data sources are not formatted this way or easily manipulated. And Epic uses unique code systems for data such as specialties, so it must be changed to the Epic specialty codes for import. The “**Epic Format**” is available [here](#).
2. **Error Checking:** Next, the data is loaded into Epic using the Compare Process, which starts with an error check. The entire file is rejected if there is a missing digit in a zip code or phone number or an invalid address. Errors must be manually corrected before moving to the next stage.
3. **Comparing With Existing Providers:** Then the Compare Process moves to the second stage to identify matching providers in “**Chronicles**.” Chronicles is the database that stores verified providers, each with its own “**SER Record**” (a verified directory entry). When it finds an exact or probable match, it outputs this information to another CSV file for manual review. The Epic Analyst conducting the review has to decide whether to merge, replace or reject the new data.
4. **Adding New Providers:** Any provider not found in Chronicles is added to “**Caché**.” Caché is a secondary database that holds unvalidated data. It can be searched through Provider Finder but can’t be used for communications until another process is completed (see next section).

### DATA VALIDATION

Once data is loaded into Chronicles and Caché, there is more to do. When a user selects a provider from the Caché database, Epic kicks off another process:

1. **Hold the Communication:** Since the selected provider hasn’t been verified, any communication that the User wants to send is held in a queue while the verification process takes place. In other words, clinical communications can be held up for days or weeks while the provider’s information is reviewed.

2. **Verification:** Epic automatically creates an “**Unverified Provider Maintenance**” (UPM) record and alerts the IT team that a new provider is waiting for review. For a 1,000-bed hospital, this happens 20-40 times per day. The assigned Epic Analyst then has to download the UPM records as a CSV file, review the data, add data (such as qualifications and license numbers) and then upload the UPM file so that the provider is moved into Chronicles and an SER record is created.

## DATA ADDITION

Few hospitals (except for careMESH customers) have attempted to load a comprehensive directory including every physician and prescriber in the country. Without a complete directory, the data in Chronicles and Caché is incomplete, and users will need to use the Provider On The Fly process to add a provider manually. Here’s how that works:

1. **Epic Form:** The User begins by completing the Provider On The Fly form in the Provider Finder module. While not mandatory, they are encouraged to research the provider and enter Name, Specialty, NPI number, Location, Phone, Fax, Direct Address, and other information. This takes precious clinician time—conservatively 10 minutes per provider.
2. **Output File:** Regularly, an Epic Analyst downloads requests as another UPM file. And the process described above then takes place.

## *Is There An Easier Option?*

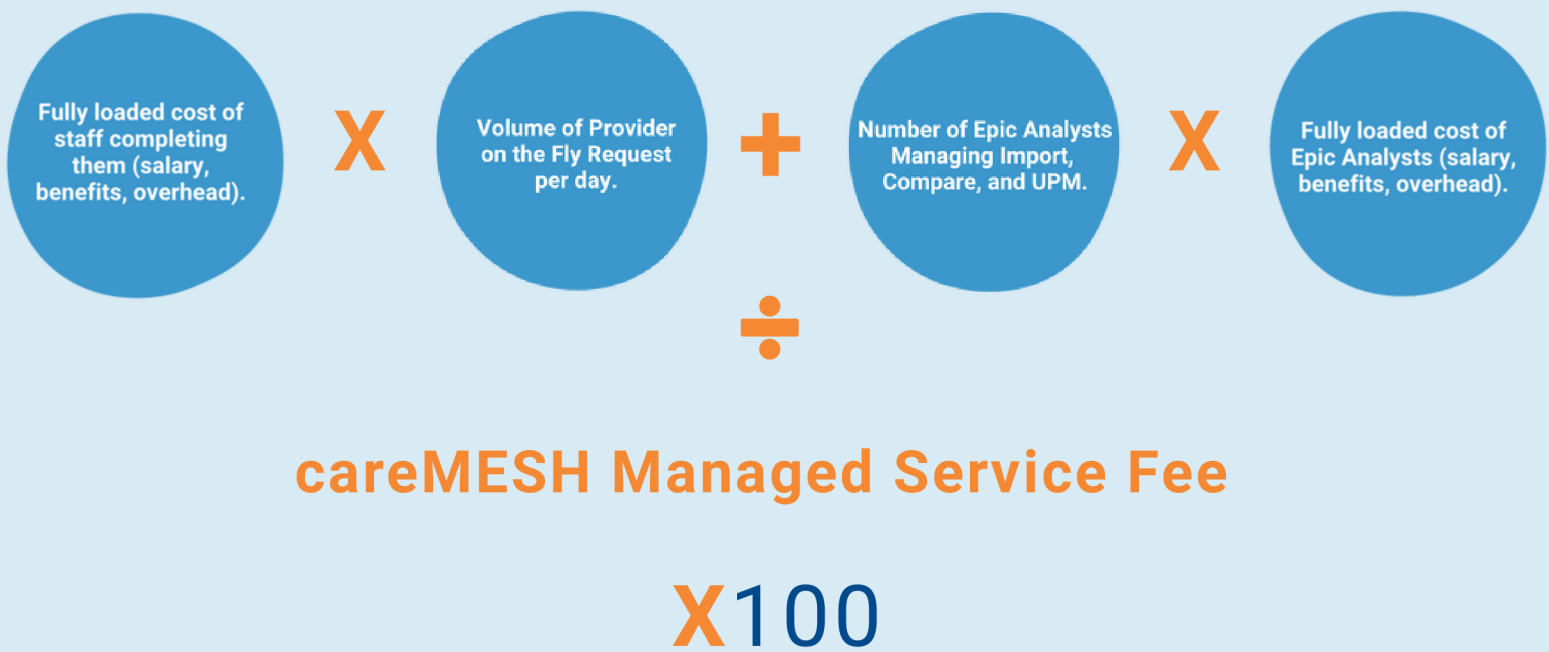
careMESH has been managing Epic directories for years. In addition to providing the most comprehensive national directory of provider information, we offer a “**Fully Managed Epic Directory Service**”:

1. **Single Data Source:** A single data source to cover every physician and prescriber in the country. The data is formatted for Epic’s importer and has already been error checked, so the errors are rare—even when loading 1.7M records.
2. **Manage Data Load:** Moving from multiple data sources to a “single source of truth” means that the load process is limited to uploading one file (we recommend monthly). When customers grant careMESH limited administrative access to Epic, we trigger the load process.
3. **Manage Compare:** Based on business rules and processes agreed with hospital customers, careMESH reviews and updates the Compare File and either uploads it directly to Epic or provides the file to the hospital for import.
4. **Manage UPM:** As with the Compare File, careMESH reviews the UPM file and provides a completed data set to load.

This Fully Managed Directory Service eliminates the routine work completed by Epic Analysts or limits it to running the upload of 3 files—a task that takes minutes, not days—saving valuable resources to focus on new and innovative projects.

### *A Simple ROI Calculation*

The financial ROI is simple to calculate using hard data. Here's our formula:



Then add in the intangible benefits:

- Happier Epic users who can find any provider in the nation
- Reduced delays in sending messages
- Happier Epic analysts that are relieved of a set of administrative tasks