| **Wake Forest® Baptist Health** | **DOCUMENT TYPE:**<br>☒ Form | **ORIGIN DATE IN TITLE 21**<br><br>New |
|---|---|---|
| CLIA Lab Director:<br><br>Dr. Gregory Pomper | **LAB DEPARTMENT:**<br><br>Central Processing Lab and Client Services | **CONTACT:**<br><br>Central Processing Manager |

If a provider for an outreach (X account) location is not listed in CareEvolve:

1. **Central Processing After Hours:**

    a. Check to see if the provider is listed in WakeOne:
       i. Open Provider Finder (EPIC button – Tools – Provider Finder; or search Provider Finder).
       ii. Type provider's name in Provider box.
       iii. Choose the correct provider from the list (if available).
       iv. Click Search in bottom left corner
       v. Provider information including NPI will be listed.

    b. If the provider is in WakeOne but not in CareEvolve :
       i. Email pathtech@wakehealth.edu with the following information:
          * Location that the provider needs to be added to (X location)
          * Provider's full name
          * Provider's NPI (from Provider Finder)

    c. If the provider is not in WakeOne OR CareEvolve:
       i. Email pathtech@wakehealth.edu with the following information:
          * Location that the provider needs to be added to (X location)
          * Provider's full name
          * Provider's NPI
          * Clinic Name
          * Clinic Address
          * Clinic Phone and Fax number
       ii. If you are unable to locate the necessary information, send an email to client services: (lab_custserv_dl@wakehealth.edu) with the patient and X account information, and leave the requisition in the Client Services door.

2. **Client Services:**

    a. Check to see if the provider is listed in WakeOne:
       i. Open Provider Finder (EPIC button – Tools – Provider Finder; or search Provider Finder).
       ii. Type provider's name in Provider box.
       iii. Choose the correct provider from the list (if available).

iv. Click Search in bottom left corner

v. Provider information including NPI will be listed.

b. If the provider is in WakeOne but not in CareEvolve:

i. Log into CareEvolve as a Super User.

ii. Enter the Location name or ID in the "Enter a Keyword to Search for Practice."

iii. Select the appropriate practice location.

iv. Under Users, select Manage.

v. Click Add New.

vi. Enter the following fields:

- User Type: Provider
- Access Level: Results Only*
  *Note: Full CareEvolve access or Practice Administrator may be used, but only at the direction of the Outreach Account Executive or Manager.
- Username: Enter a username with at least ten characters – First Initial, Last name, Location (for example, FLASTXTEST)
- Password: Enter Password!00 (For providers at PSCs or Home Health enter N0passing!)
- First name: Enter First name
- Middle name: Enter Middle name if present
- Last Name: Enter Last name
- Degree: Enter Degree (MD, PA-C, NP, etc.)
- Patient Search: Select default "Last Name"
- Provider ID: Enter Provider ID from PROVIDER ID field in WakeOne
- NPI Number: Enter Provider NPI number

vii. Click Submit.

viii. Email provider username and password to Outreach manager (kacobb@wakehealth.edu) and PathTech (pathtech@wakehealth.edu) to notify an addition was made. If an addition needed to be made in WakeOne, please include the service-now ticket number in the email communication.

**Note:** Do not email username or password to PSC or Home Health providers.

c.. If the provider is not in WakeOne OR CareEvolve:

i.  Follow instructions in CP 26 Provider Not in System Reconciliation

ii. When provider has been built in WakeOne, follow above steps in section b to add provider to CareEvolve.