

# **TalisPoint Users' Guide**

Version 1.1

March 2014

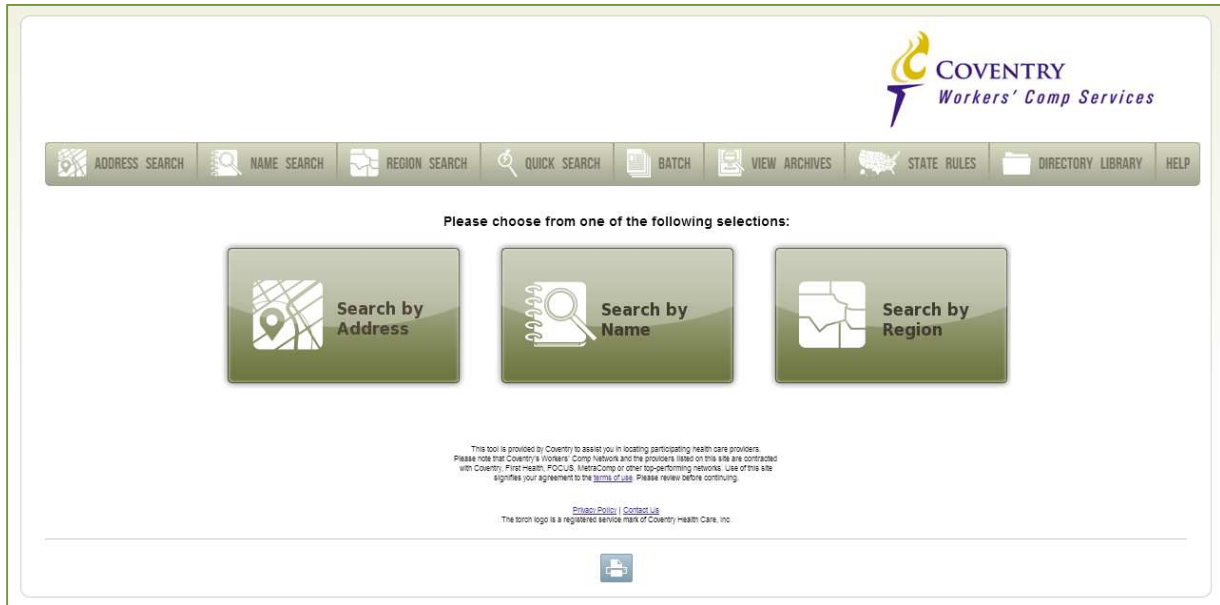
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## What is TalisPoint?



TalisPoint is Coventry Workers' Compensation Services' licensed web-based channeling tool. It's a website available 24/7 to Coventry Health Care Workers' Compensation Services Clients for their referral needs. The site supports searching for nearby Providers, the creation of Directories that can be printed and distributed as well as the creation of Worksite Posters or Panels to be utilized in the workplace, informing injured workers of nearby, in-network Providers able to treat them for a worksite injury. The site also offers a State Rule section where each State's regulations, as they pertain to channeling rules are outlined, such as who has the right to choose the treating Provider and if worksite Posters or Panels are allowed, etc.

## How Does TalisPoint Get Updated?

Coventry sends referral data to TalisPoint each Monday from our Provider database. The extract is initiated each Saturday. The data sent to TalisPoint reflects the cumulative changes to our Provider data during the previous week, up to the close of business Friday, the day before the extract is initiated. It takes TalisPoint an additional week to process the data and promote it to the production environment where it can be utilized by our Clients. The time between when an update is made to a Provider record in our Provider database to when that update is viewable on the TalisPoint website can vary from ten (10) days to sixteen (16) days.

## How Does TalisPoint Work?

When searching for nearby Providers, TalisPoint utilizes the latitude and longitude of the starting point of the search and the latitudes and longitudes of Providers to calculate the straight line distance. The more accurate the starting point, the more accurate the results. Let's say only a ZIP Code is entered as the starting point. TalisPoint will use the latitude and longitude of the geographic-centroid point within the ZIP Code which may or may not be close to the actual intended location. It's always best to enter the actual street address when searching for nearby Providers because it will result in the most accurate search results.

When creating Worksite Posters, TalisPoint will first attempt to fill the Worksite Poster (WSP) with Providers matching the user's criteria out to two (2) miles from the input Worksite Poster location. If TalisPoint is unable to completely fill the WSP at the first distance, it will increase the search radius in successive steps until it is able to completely fill the WSP to the user's criteria. This way, TalisPoint guarantees the closest Providers will be chosen first.

TalisPoint also allows the user to communicate with Coventry Workers' Compensation Services, via e-mail, through its "Make a Letter" functionality, in order to convey any information about a Coventry Provider that the user may gather through their work, such as Providers' changes of address, Providers on temporary leaves of absences, etc.

## Searching for a Provider

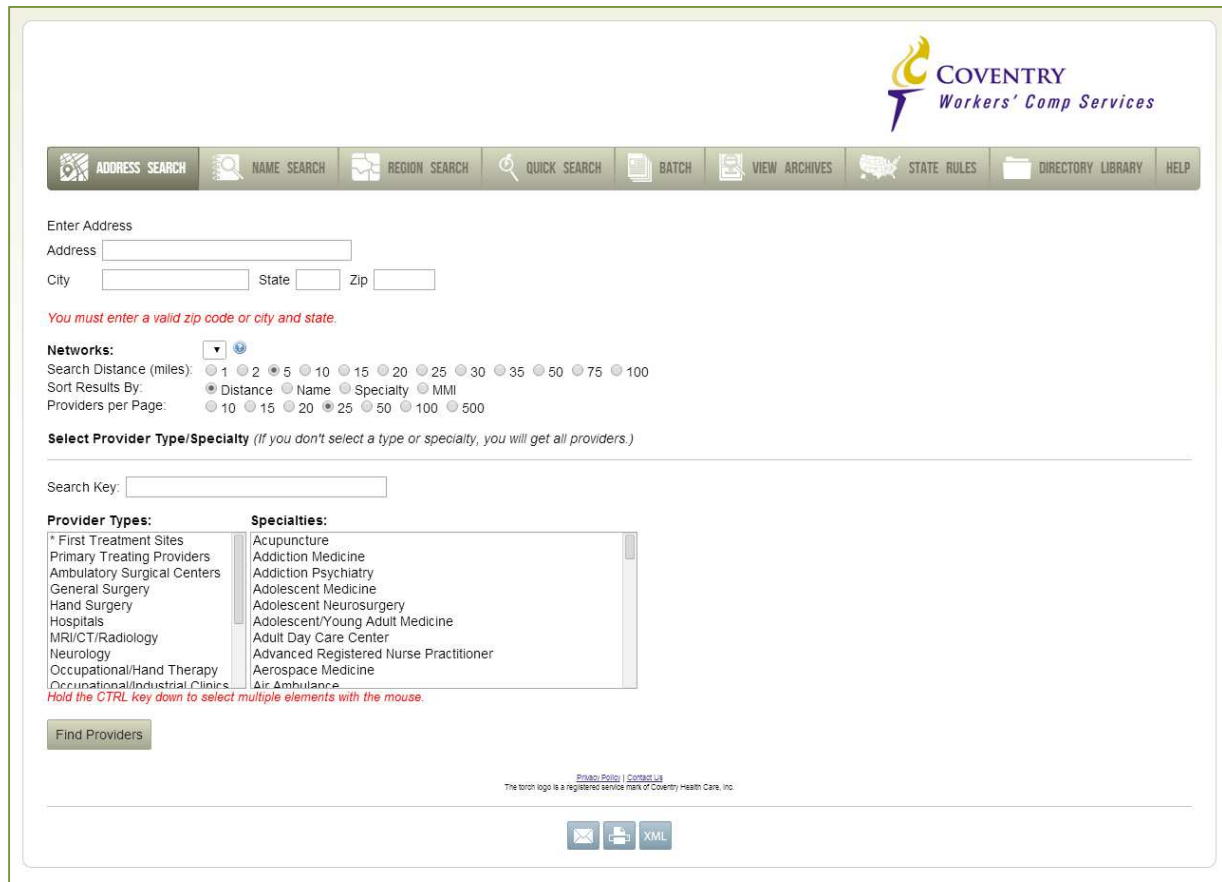
There are four (4) ways to search for Providers on TalisPoint: Address Search, Name Search, Region Search, and Quick Search. The first three (3) methods are customizable for variables such as Distance and types of Providers; while the last, Quick Search, is not. Quick Search's variables are pre-set so it will quickly return initial treatment-type Providers without requiring further user input.

Address Search will return Providers matching the user's Provider-type or Provider Specialty criteria that are within the specified radius of the user-input location.

Name Search will return Providers matching the user's specified Provider name (or Facility name), or Group affiliation (for Providers that are members of a Practice Group), or phone number. All Name Searches can be restricted to a State the user specifies.

Region Search is a specialized version of Address Search. Instead of performing a radius search around a user specified location, it will return Providers matching the user's Provider-type or Provider Specialty criteria that are within the specified State, County, City combination. If the State selected has GSAs, such as California or Texas, that geographic region will also be available for grouping/searching.

## Address Search



The screenshot shows the TalisPoint Address Search interface. At the top right is the Coventry Workers' Comp Services logo. Below it is a navigation bar with buttons for ADDRESS SEARCH, NAME SEARCH, REGION SEARCH, QUICK SEARCH, BATCH, VIEW ARCHIVES, STATE RULES, DIRECTORY LIBRARY, and HELP. The main search area includes an 'Enter Address' section with input fields for Address, City, State, and Zip. A red error message states: 'You must enter a valid zip code or city and state.' Below this is a 'Networks' section with a dropdown menu and radio buttons for search distance (1, 2, 5, 10, 15, 20, 25, 30, 35, 50, 75, 100 miles) and sort results by (Distance, Name, Specialty, MMI). There are also radio buttons for providers per page (10, 15, 20, 25, 50, 100, 500). A 'Select Provider Type/Specialty' section contains a 'Search Key' input field and two scrollable lists: 'Provider Types' (including First Treatment Sites, Ambulatory Surgical Centers, etc.) and 'Specialties' (including Acupuncture, Addiction Medicine, etc.). A 'Find Providers' button is located below the lists. At the bottom, there are links for 'Print Page' and 'Contact Us', a copyright notice for Coventry Health Care, Inc., and icons for email, print, and XML.

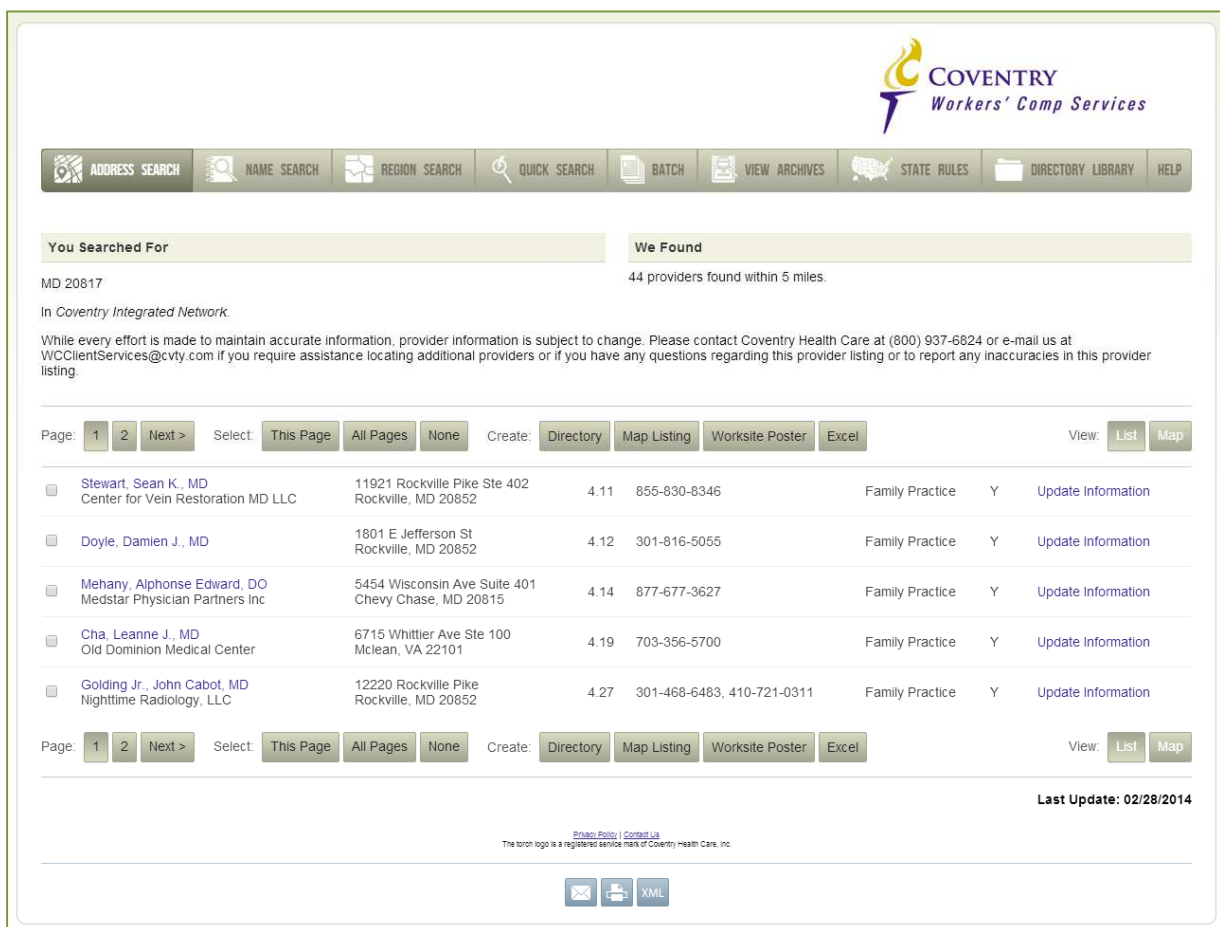
The TalisPoint Address Search screen is shown above. Here you can perform radius searches for Providers around a location you input. You will also be able specify the type of Providers you want TalisPoint to return to you, such as Initial Treatment Providers, or Cardiologists, etc.

Your first step will be to enter either an address and city, or a zip code as your starting location. As you type, TalisPoint, in the background, will attempt to validate your location so that the most accurate latitude and longitude can be used as the starting point for the search. If TalisPoint is unable to validate the location, a message will display under the City, State, and Zip boxes, in **red**, letting you know that it was unable to validate the location.

Then select the Network from the **Networks** drop-down box in which you wish to perform your search. From this drop-down box you can choose the Coventry Integrated Network, an MPN, an HCN, an EPP Network, etc.

The last sections allow you select the search radius, change the default results sort and specify how many Providers you want listed on each page.

Choose as many **Provider Types** and **Specialties** as needed in the Provider Types/Specialties boxes. You may also choose the type(s) of Provider(s) you wish to see in the final results screen. To select multiple elements of either the Provider Types or Specialties list boxes, hold down the **CTRL** key while making your selections. When you are ready to begin executing the Provider search, click the **Find Providers** button at the bottom left of the screen and you will be taken to the screen below where you can select the Providers you want to see in your final results:



**COVENTRY**  
Workers' Comp Services

ADDRESS SEARCH | NAME SEARCH | REGION SEARCH | QUICK SEARCH | BATCH | VIEW ARCHIVES | STATE RULES | DIRECTORY LIBRARY | HELP

**You Searched For**: MD 20817  
**We Found**: 44 providers found within 5 miles.

In Coventry Integrated Network.

While every effort is made to maintain accurate information, provider information is subject to change. Please contact Coventry Health Care at (800) 937-6824 or e-mail us at WCClientservices@cvty.com if you require assistance locating additional providers or if you have any questions regarding this provider listing or to report any inaccuracies in this provider listing.

Page: 1 | 2 | Next > | Select: This Page | All Pages | None | Create: Directory | Map Listing | Worksite Poster | Excel | View: List | Map

<input type="checkbox"/>	Stewart, Sean K., MD Center for Vein Restoration MD LLC	11921 Rockville Pike Ste 402 Rockville, MD 20852	4.11	855-830-8346	Family Practice	Y	<a href="#">Update Information</a>
<input type="checkbox"/>	Doyle, Damien J., MD	1801 E Jefferson St Rockville, MD 20852	4.12	301-816-5055	Family Practice	Y	<a href="#">Update Information</a>
<input type="checkbox"/>	Mehany, Alphonse Edward, DO Medstar Physician Partners Inc	5454 Wisconsin Ave Suite 401 Chevy Chase, MD 20815	4.14	877-677-3627	Family Practice	Y	<a href="#">Update Information</a>
<input type="checkbox"/>	Cha, Leanne J., MD Old Dominion Medical Center	6715 Whittier Ave Ste 100 McLean, VA 22101	4.19	703-356-5700	Family Practice	Y	<a href="#">Update Information</a>
<input type="checkbox"/>	Golding Jr., John Cabot, MD Nighttime Radiology, LLC	12220 Rockville Pike Rockville, MD 20852	4.27	301-468-6483, 410-721-0311	Family Practice	Y	<a href="#">Update Information</a>

Page: 1 | 2 | Next > | Select: This Page | All Pages | None | Create: Directory | Map Listing | Worksite Poster | Excel | View: List | Map

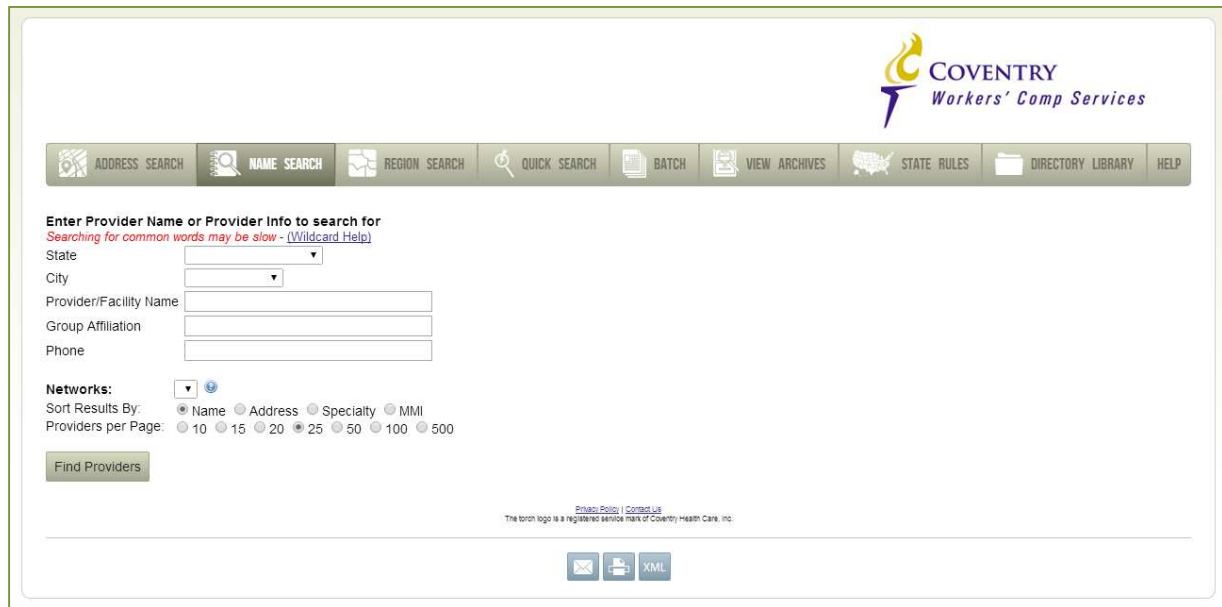
**Last Update: 02/28/2014**

[Privacy Policy](#) | [Contact Us](#)  
The boron logo is a registered service mark of Coventry Health Care, Inc.

[Email](#) | [Print](#) | [XML](#)

Once you are satisfied with your selections on this screen: search distance, click the **Find Providers** button at the bottom left of the screen and all of the Providers meeting your criteria will be displayed on a new page, the Provider Search Results page, which is described in the Provider Search Results Page section on Page 10.

## Name Search



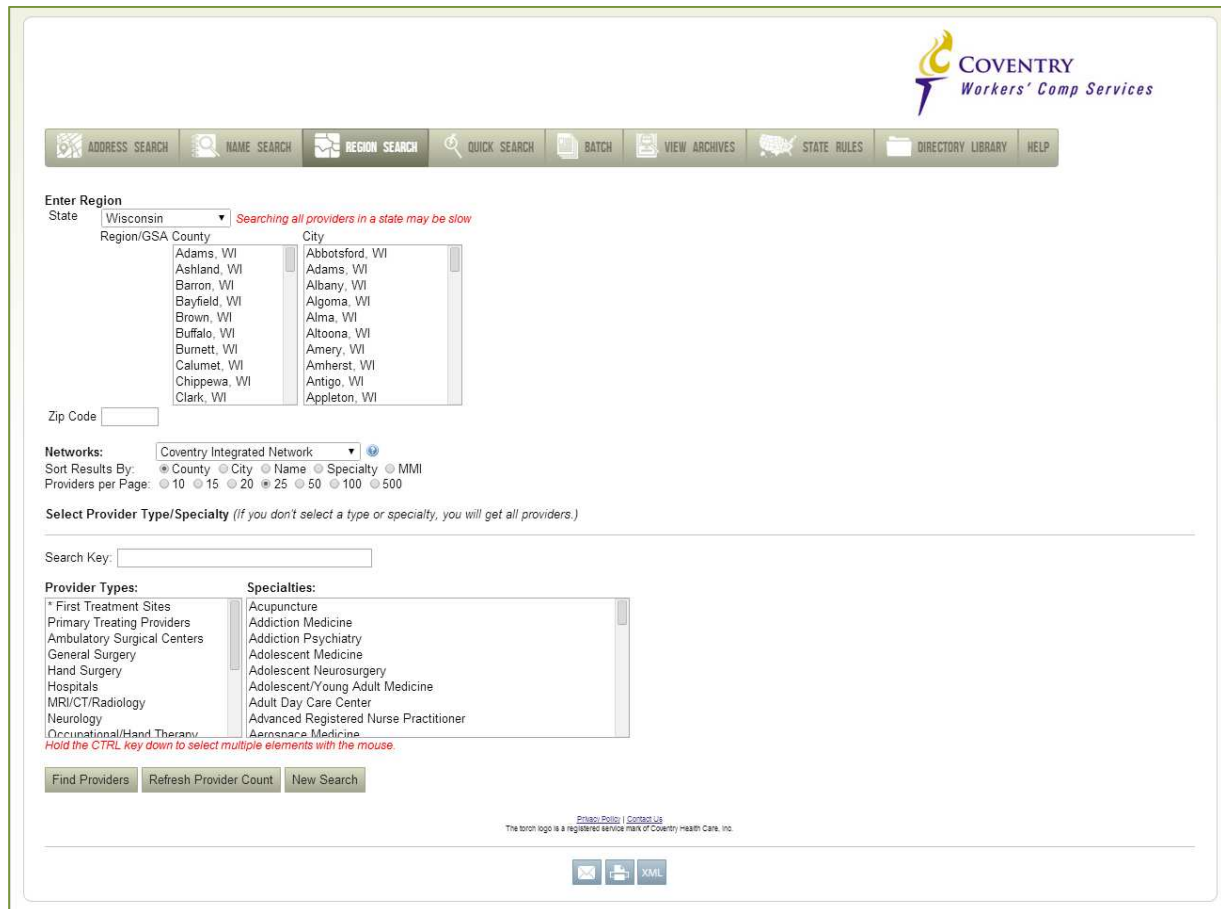
The TalisPoint Name Search screen is shown above. Here you can perform searches for Providers by their name or Group affiliation or phone number. You can also limit your search to a State.

Your first step will be to input the Provider's name, affiliation or phone number and optionally, the State in which you wish the search to be performed. The next section of the screen is where you will select a Network from the **Networks** drop-down box in which you wish to perform your search.

The last sections allow you to change the default results sort and specify how many Providers you want listed on each page. When you are ready to begin executing the Provider search, click the **Find Providers** button at the bottom left of the screen.

Unlike the Address Search, Name Search does not give you the ability to select the type of Providers or Provider Specialties you want returned. All of the Providers meeting your criteria will be displayed on a new page, the Provider Search Results page, which is described in the Provider Search Results Page section on Page 10.

# Region Search



The TalisPoint Region Search screen is shown above. Here you can perform Region searches within a State for Providers within the geographic area you input. You will also be able specify the type of Providers you want TalisPoint to return to you, such as Initial Treatment Providers, or Cardiologists, etc.

The first section is where you will specify your geographic regions for the search. Each list box is successively driven by what you've selected in the previous list box. So, if you select California or Texas from the **State** drop-down list, the **Region/GSA** list box will populate. It will not populate for any other State selections. It must be noted that only Regions/GSAs, Counties and Cities will be displayed that contain Coventry Providers. The listings are not all of the Regions or GSAs in a State, Counties in a State or Cities within a County within a State, but only those where a Coventry contracted Provider is located.

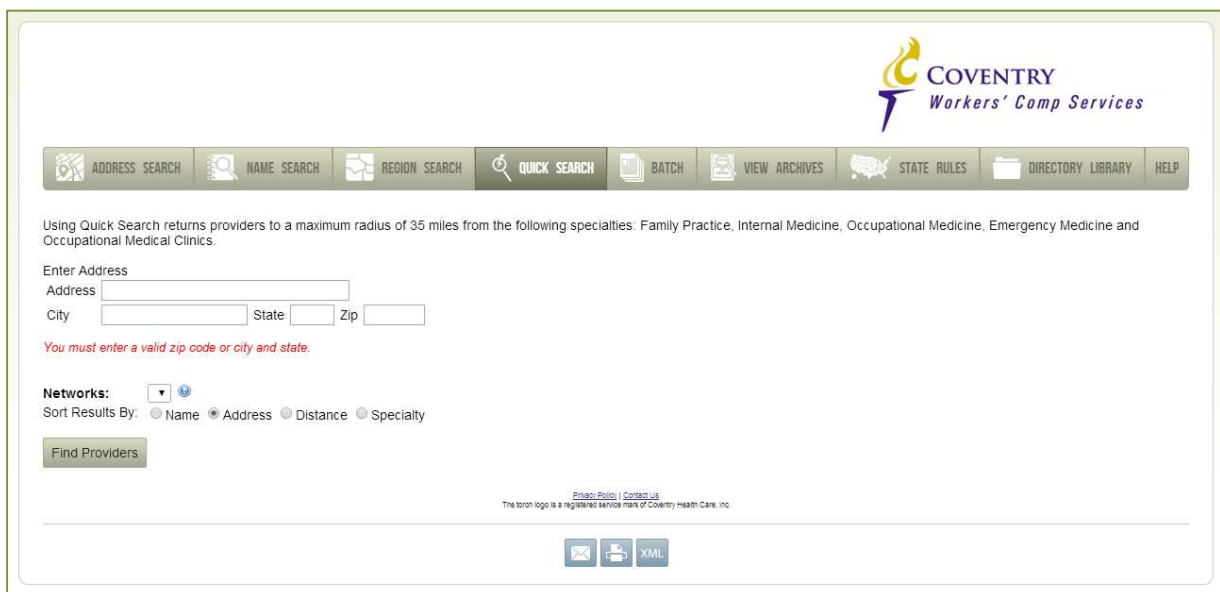
Next, select the Network from the **Networks** drop-down box in which you wish to perform your search.



Choose as many **Provider Types** and **Specialties** as needed in the Provider Types/Specialties boxes. You may also choose the type(s) of Provider(s) you wish to see in the final results screen. To select multiple elements of either the Provider Types or Specialties list boxes, hold down the **CTRL** key while making your selections.

Once you are satisfied with your selections on this screen: search distance, click the **Find Providers** button at the bottom left of the screen and all of the Providers meeting your criteria will be displayed on a new page, the Provider Search Results page, which is described in the Provider Search Results Page section on Page 10.

## Quick Search

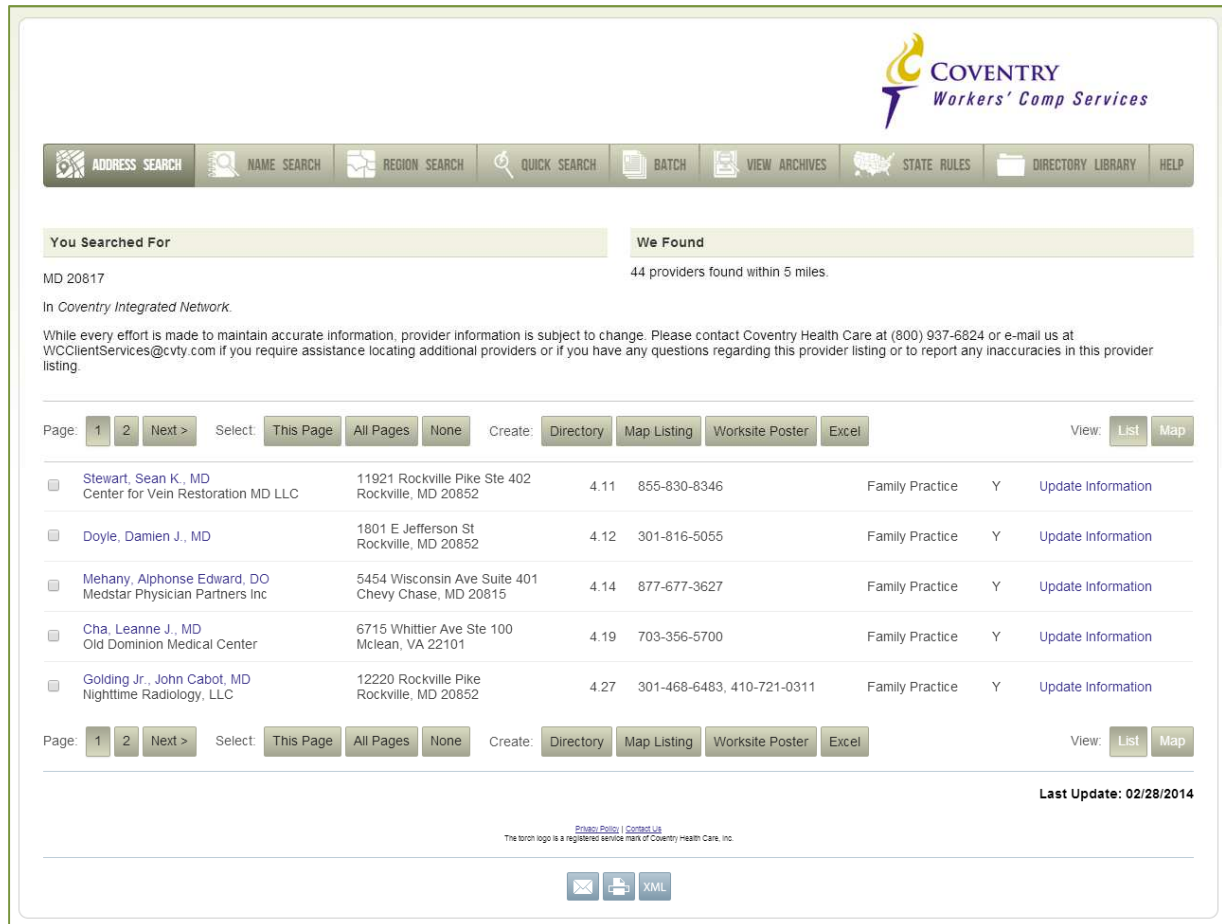


The TalisPoint Quick Search screen is shown above. Quick Search's variables are pre-set so it will quickly return initial treatment-type Providers without requiring further user input. This type of search is most appropriate for locating First Treatment Sites or Primary Treating Providers and is not suitable for locating a specific Provider since you will not be given the opportunity to input any variables that will allow TalisPoint to limit its search beyond the pre-set radius or Provider types.

Once you are satisfied with your selections on this screen: search distance, click the **Find Providers** button at the bottom left of the screen and all of the Providers meeting the pre-set Quick Search criteria will be displayed on a new page, the Provider Search Results page, which is described in the Provider Search Results Page section on Page 10.

## Search Results Page

All of the TalisPoint Provider search methodologies, Address Search, Name Search, Region Search and Quick Search will present their final results in the same way:



The screenshot shows the Coventry Workers' Comp Services search results interface. At the top right is the company logo. Below it is a navigation bar with buttons for ADDRESS SEARCH, NAME SEARCH, REGION SEARCH, QUICK SEARCH, BATCH, VIEW ARCHIVES, STATE RULES, DIRECTORY LIBRARY, and HELP. The main content area shows search criteria (MD 20817) and results (44 providers found within 5 miles). A disclaimer states that provider information is subject to change and provides contact information. Below the disclaimer is a table of search results with columns for provider name, address, distance, phone number, specialty, and a link to update information. The table lists five providers: Stewart, Sean K., MD; Doyle, Damien J., MD; Mehany, Alphonse Edward, DO; Cha, Leanne J., MD; and Golding Jr., John Cabot, MD. At the bottom of the table are pagination controls and a 'Last Update: 02/28/2014' timestamp.

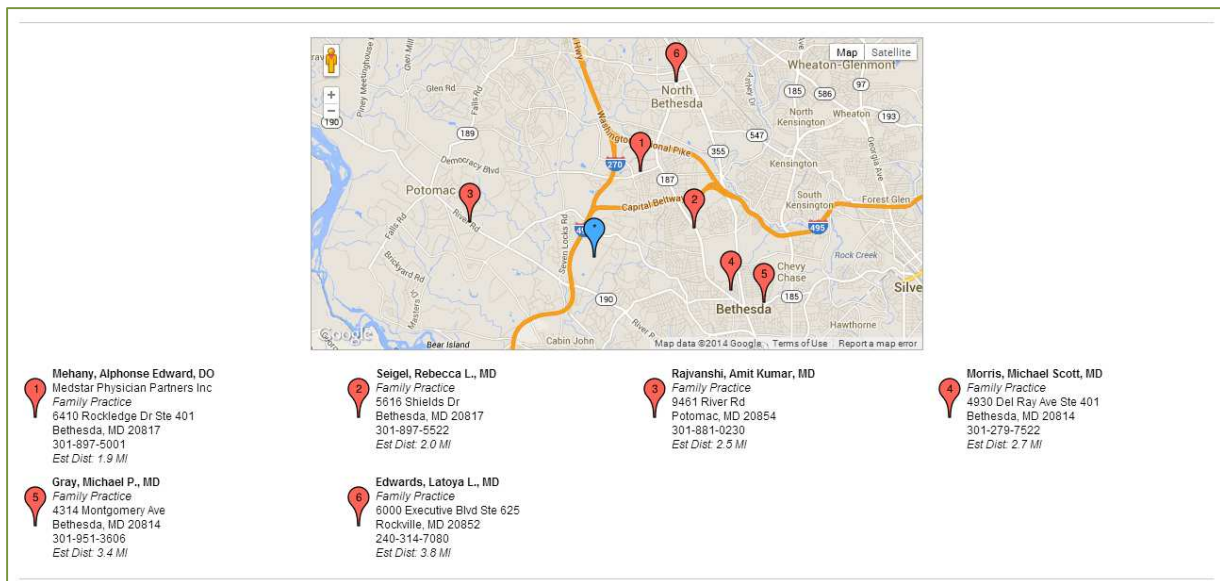
Provider Name	Address	Distance	Phone Number	Specialty	Update Info
Stewart, Sean K., MD Center for Vein Restoration MD LLC	11921 Rockville Pike Ste 402 Rockville, MD 20852	4.11	855-830-8346	Family Practice	Y <a href="#">Update Information</a>
Doyle, Damien J., MD	1801 E Jefferson St Rockville, MD 20852	4.12	301-816-5055	Family Practice	Y <a href="#">Update Information</a>
Mehany, Alphonse Edward, DO Medstar Physician Partners Inc	5454 Wisconsin Ave Suite 401 Chevy Chase, MD 20815	4.14	877-677-3627	Family Practice	Y <a href="#">Update Information</a>
Cha, Leanne J., MD Old Dominion Medical Center	6715 Whittier Ave Ste 100 McLean, VA 22101	4.19	703-356-5700	Family Practice	Y <a href="#">Update Information</a>
Golding Jr., John Cabot, MD Nighttime Radiology, LLC	12220 Rockville Pike Rockville, MD 20852	4.27	301-468-6483, 410-721-0311	Family Practice	Y <a href="#">Update Information</a>

The first portion of the Provider Search Results screen displays some specifics about your search inputs and the number of Providers TalisPoint found matching your search criteria. It is important to remember that while we make every effort to keep our on-line directory information current and accurate; our network of participating Providers is continually changing.

The next section of the Provider Search Results screen lists the matching Providers in a distance format. This format presents the basic Provider information necessary to locate a Provider for rendering treatment. If more information about the Provider is needed, you may click the Provider's name, which will bring up a new screen with detailed information about that Provider, the Provider Information Page, described in the Provider Information Page section on page 12.


From the returned Providers, you can create a Directory from all or only your selected Providers by clicking the **Directory** button at the bottom of the page. To select Providers for inclusion in a Directory (if you don't want all of them), just click the check-box to the left of the Providers' name you want to include before you click the Directory button at the bottom of the page.

You can also create a **Map Listing** in which selected doctor's locations will be displayed as thumbnails on a map:



Additionally, you can also extract the returned Providers into an Excel spreadsheet by clicking the **Excel** button. Just like the Directory, Map Listing, or Batch (WSP is described on page 14) functionality, you may extract all of the Providers or only those you have selected by clicking on the check boxes to the left of the Providers' names you want to include in your spreadsheet.

# Provider Information Page



ADDRESS SEARCH NAME SEARCH REGION SEARCH QUICK SEARCH BATCH VIEW ARCHIVES STATE RULES DIRECTORY LIBRARY HELP

ON THIS PAGE [Provider Information](#), [Create Letter](#), [Map](#), [Driving Directions](#)

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### PROVIDER INFORMATION

**Provider** Stewart, Sean K., MD  
Center for Vein Restoration MD LLC

**Address** 11921 Rockville Pike Ste 402  
Rockville, MD 20852

**Specialty** Family Practice

**Phone** 855-830-8346

**Fax** 240-473-4321

**Degrees** Medical Doctor

**License** MD-BS09246213, MD-DCBS9246213, MD-VA0101253259, MD-VABS9246213

**Gender** Male

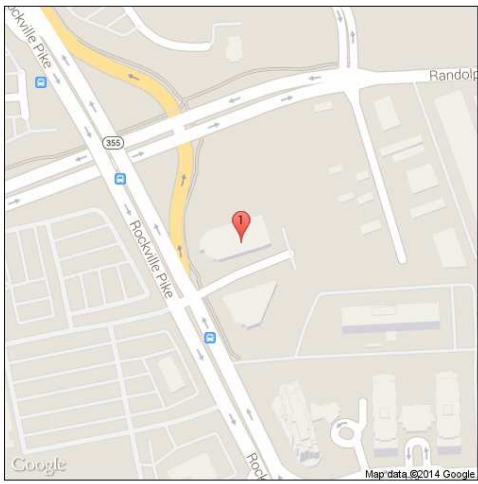
**Accept New Patients?** Y

**Accept New WorkComp Patients?** Y

**CREATE LETTER**

Update Information




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### DRIVING DIRECTIONS

Address

City  State  Zip

This additional detailed information will vary by Provider, but can include NPIs, Hours of Operation, additional Specialties, etc. In addition to the information about the Provider, a map of the Provider location is also provided, as well as detailed, turn-by-turn driving directions from the location you specified when initiating your search. You may also regenerate turn-by-turn driving

directions from this page in case you need to direct multiple employees from multiple locations to the same Provider.

To return to the Provider Search Results, click the **Back to Results** button at the top of the Map. If you find that the Provider information on the screen is inaccurate or is incomplete, you may communicate that directly to Coventry, via e-mail, by clicking on the Make a Letter button at the top of the Map, which will bring up the following new screen:

## Make a Letter Page

**Provider Letter**

Below, you will see a preview of your e-mail's content (note, final formatting is not shown here). To continue, please complete all necessary information in the entry fields below and then click on **Create E-Mail** at the bottom of the screen.

---

**To** Coventry - COV\_FRH  
 ✓  
(for testing purposes, email to address can be changed in DEV/UAT)  
 Provider ID C:2472752

**From**  \*  
 **Send copy to self**

**CC**

**Subject** Notification of Provider Status Change, Coventry ID C:2472752

\* Indicates a required input

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**Notification of Provider Status Change**

User AE#/CAID: 997291691/WCALL

March 5, 2014

Stewart, Sean K., MD  
 Center for Vein Restoration MD LLC  
 11921 Rockville Pike Ste 402  
 Rockville, MD 20852  
 855-830-8346  
 Tax ID: 31-1586565  
 Coventry ID: C:2472752

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\* found that the following information changed.

Note: Please complete all appropriate sections.

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**Provider** Provider moved

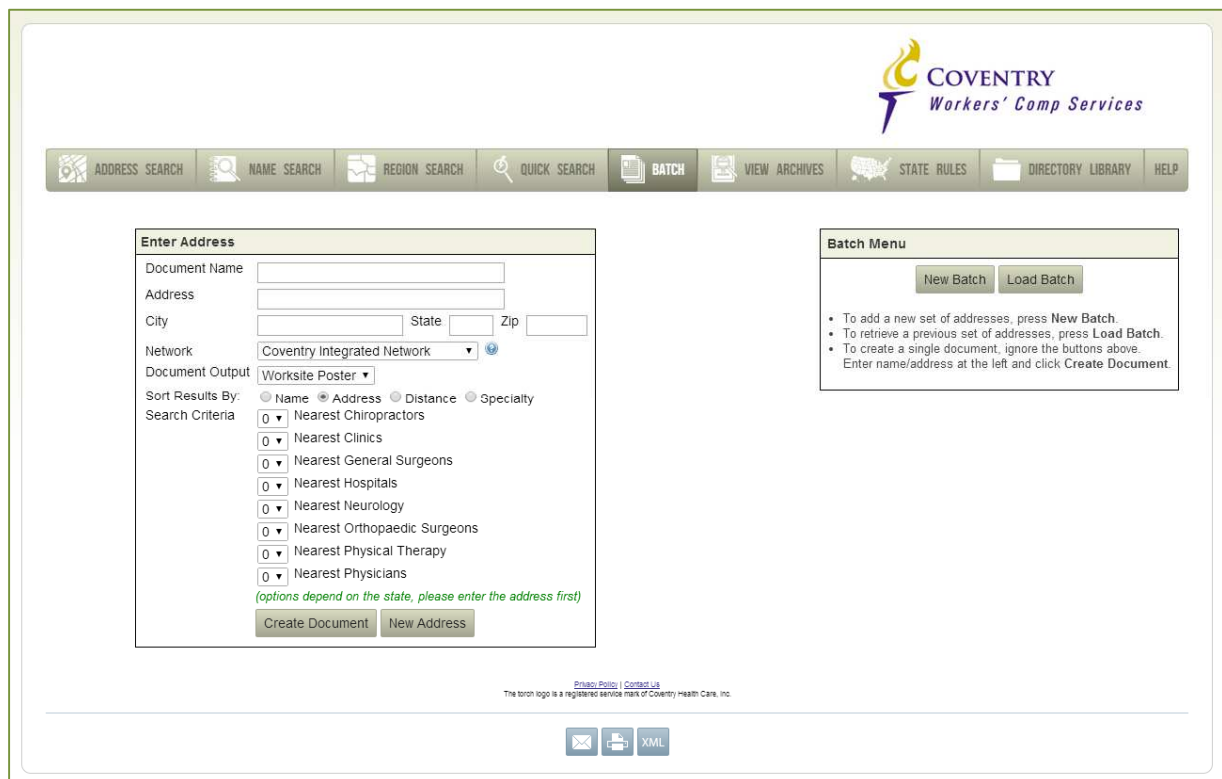
This screen allows you to input information about the Provider you wish to communicate to Coventry. Please specify your e-mail address in the **From:** field, your name in the field specified, and you may specify anyone you wish to be copied in the **CC:** field. Once you are ready to send the e-mail, click the **Create Letter** button at the bottom of the page and an e-mail will be sent to Coventry Workers' Compensation Client Services for review.

You may also reach this screen from the Provider Search Results data-grid by clicking the [Update Information](#) link in the last column of the data-grid.

To return to the previous screen, the Provider Information screen, click the **Return to Provider Map** button at the top or bottom of this screen.

## Worksite Posters (WSP)

TalisPoint allows you to create Worksite Posters, either singularly or in large batches, for your Employers' locations. Below is the Worksite Poster screen:




The left side of the screen is where you can input information to create a single Worksite Poster. Here you will input the Document Name, typically the Employer's Location name, the Employer's address information, the Network from which you want TalisPoint to select the Providers and the number of each type of Provider you want on your Worksite Poster. Depending on the State in which your Employer's location is located in, some of the types of Providers may be disabled or the number of a certain type of Provider cannot be zero (0) in order to be State compliant.

The right side of the screen is for loading batches of Employer locations so that large numbers of Worksite Posters can be processed efficiently. In order to do this, TalisPoint requires that your Employer locations be in a standard format. If you haven't already downloaded a batch template, when you go to create a new batch by clicking the **New Batch** button, you will be given a link to download the standard TalisPoint WSP batch template that you must use in order to utilize the TalisPoint WSP batch functionality.

## Single Worksite Posters

In this section we will discuss how to create a single Worksite Poster (WSP). From the TalisPoint Worksite Poster screen describe on page 15, you will input your Employer location information and the number and type(s) of Providers you want to appear on your WSP. After you have specified your Employer location, number and type(s) of Providers, click the **Create Worksite Poster** button at the bottom of the page. TalisPoint will open a new browser window and begin searching for the nearest Providers meeting your criteria. Once Providers have been identified, you will see the screen below, where you can make modifications to the WSP itself or individual Providers before the final document is created:

Create Worksite Poster



Upload an image no larger than 125 pixels in height Choose File No file chosen

Select the language for the worksite poster:

English  Spanish

Policy Number (optional):

Document Name (optional):

Use the **"Remove"** button to take off any provider you do not want to display on the Worksite Poster.

**"Edit"** allows you to change the information for the provider displaying on the poster.

**"Restore"** allows you to remove all changes you made to the display.

**CLINICS**

<p><b>Burlingame Therapeutic Associates</b> Occupational Medicine Clinic 1828 El Camino Real Ste 609 Burlingame, CA 94010 650-692-4811 <i>Est Dist: 1.3 MI</i></p>	<p><b>*Immed Inc</b> Occupational Medicine Clinic 1663 Rollins Rd Burlingame, CA 94010 650-697-0600 <i>Est Dist: 1.1 MI</i></p>	<p><b>*Immediate Care</b> Urgent Care Clinic Walk In Clinics 60 N El Camino Real San Mateo, CA 94401 650-570-2273 <i>Est Dist: 2.3 MI</i></p>	<p><b>Peninsula Hospital</b> Occupational Medicine Clinic 1501 Trousdale Dr Burlingame, CA 94010 650-696-5400 <i>Est Dist: 1.2 MI</i></p>
<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>	<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>	<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>	<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>

Add Custom Provider to this Section Add Network Provider to this Section

**HOSPITALS**

<p><b>Sequoia Hospital</b> General Acute Care Hospital 170 Alameda De Las Pulgas Redwood City, CA 94062 650-367-5946, 650-369-5811 <i>Est Dist: 9.5 MI</i></p>	<p><b>Seton Medical Center</b> General Acute Care Hospital 1900 Sullivan Ave Daly City, CA 94015 650-992-4000 <i>Est Dist: 8.9 MI</i></p>	<p><b>Seton Medical Center Coastside</b> General Acute Care Hospital 600 Marine Blvd Moss Beach, CA 94038 650-563-7100 <i>Est Dist: 8.8 MI</i></p>
<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>	<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>	<span>Edit</span> <span>Replace</span> <span>Remove</span> <span>🗑️</span>

Add Custom Provider to this Section Add Network Provider to this Section

From here you can remove or modify Providers that TalisPoint has chosen by clicking either the **Remove** or **Edit** buttons below the Provider. If you click the **Remove** button, the Provider will become grayed out and the **Remove** button will toggle to a **Keep** button in case you change your mind and decide to keep the Provider on the WSP.

If you decide to edit the Provider, TalisPoint will open a new browser window where you can change some of the Provider's information that will appear on the WSP. This window is shown below:

Enter provider information changes below. These changes will appear only in the Worksite Poster.

Name*	<input type="text" value="Immediate Care"/>
Group	<input type="text"/>
Address*	<input type="text" value="60 N El Camino Real"/>
City*	<input type="text" value="San Mateo"/>
State*	<input type="text" value="CA"/>
Zip*	<input type="text" value="94401"/>
Phone	<input type="text" value="650-570-2273"/>
Fax	<input type="text" value="650-570-4266"/>
Specialty	<input type="text" value="Urgent Care Clinic"/>
County	<input type="text" value="San Mateo"/>
Distance	<input type="text" value="2.3 MI"/>
Contact	<input type="text"/>
Network Affiliation 1	<input type="text" value="First Health~XL Go Network"/>
Network Affiliation 2	<input type="text" value="Exclusive Preferred Provider"/>
Hours of Operation	<input type="text"/>
Languages Spoken	<input type="text"/>

\* = required

When finished editing, click the **Edit Provider** button at the bottom, the window will close and you will be returned to the previous WSP screen. The Provider you chose to edit will now appear in highlighted in a red/maroon font color to indicate that the Provider was changed by the user.


You may also add Custom Providers to the WSP by clicking the **Add Custom Provider to this Section** button at the bottom of each Section. Clicking this will open a new browser window like the one above, where you can input the Provider information you want to appear on the WSP. You must fill in all required columns in order for you custom Provider to qualify for inclusion on the WSP. When you are finished click the **Add Provider** button at the bottom of the screen and



you will be returned to the previous WSP screen. The added Provider will appear in a text box as a pipe (|) delimited string, but will be formatted properly when the final output is created.

Depending on the State in which you are creating the WSP, at the bottom of the WSP screen will be a section where you can input additional information to appear on the final WSP, such as Insurance Policy #, Date of Injury, Employee's name, etc.

When you are satisfied with the WSP, click the **Create Worksite Poster** button at the top of the page and TalisPoint will perform the final steps before presenting the finalized WSP for printing.



**In case of Injury or Illness on the job,  
the following participating providers are available in your area.**

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**CLINICS**

<p><b>Burlingame Therapeutic Associates</b> <i>Occupational Medicine Clinic</i> 1525 El Camino Real Ste 609 Burlingame, CA 94010 650-692-4811 <i>Err Dist: 1.3 MI</i></p>	<p><b>*Imedd Inc</b> <i>Occupational Medicine Clinic</i> 1663 Rollins Rd Burlingame, CA 94010 650-697-0600 <i>Err Dist: 1.1 MI</i></p>	<p><b>*Immediate Care</b> <i>Urgent Care Clinic</i> <i>Walk In Clinic</i> 60 N El Camino Real San Mateo, CA 94401 650-570-2273 <i>Err Dist: 2.3 MI</i></p>	<p><b>Peninsula Hospital</b> <i>Occupational Medicine Clinic</i> 1501 Trousdale Dr Burlingame, CA 94010 650-696-5400 <i>Err Dist: 1.3 MI</i></p>
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**\*Example Clinic**  
123 Fake St  
South San Francisco, CA 94080

**HOSPITALS**

<p><b>Sequoia Hospital</b> <i>General Acute Care Hospital</i> 170 Alameda De Las Pulgas Redwood City, CA 94063 650-367-5946, 650-369-5811 <i>Err Dist: 9.3 MI</i></p>	<p><b>Seton Medical Center</b> <i>General Acute Care Hospital</i> 1900 Sullivan Ave Daly City, CA 94015 650-992-4000 <i>Err Dist: 8.8 MI</i></p>	<p><b>Seton Medical Center Coastside</b> <i>General Acute Care Hospital</i> 600 Marine Blvd Monte Beach, CA 94038 650-568-7100 <i>Err Dist: 8.8 MI</i></p>
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**PHYSICIANS**

<p><b>Chan, Edward Y., MD</b> <i>Family Practice</i> 50 S San Mateo Dr Ste 488 San Mateo, CA 94401 415-988-3390, 650-342-0670 <i>Err Dist: 2.3 MI</i></p>	<p><b>Chen, Yung C., MD</b> <i>San Mateo Spine Center</i> <i>Yung C Chen</i> <i>Family Practice</i> 101 S San Mateo Dr Ste 301 San Mateo, CA 94401 650-558-1802 <i>Err Dist: 2.5 MI</i></p>	<p><b>Runyan, Susan J., MD</b> <i>One Medical Group Inc</i> <i>Family Practice</i> 329 Primrose Rd Fl 2 Burlingame, CA 94010 650-288-1200 <i>Err Dist: 1.0 MI</i></p>	<p><b>Saucedo, Jesus, MD</b> <i>General Practice</i> 1700 El Camino Real Ste 160 Burlingame, CA 94010 650-259-1674 <i>Err Dist: 1.1 MI</i></p>
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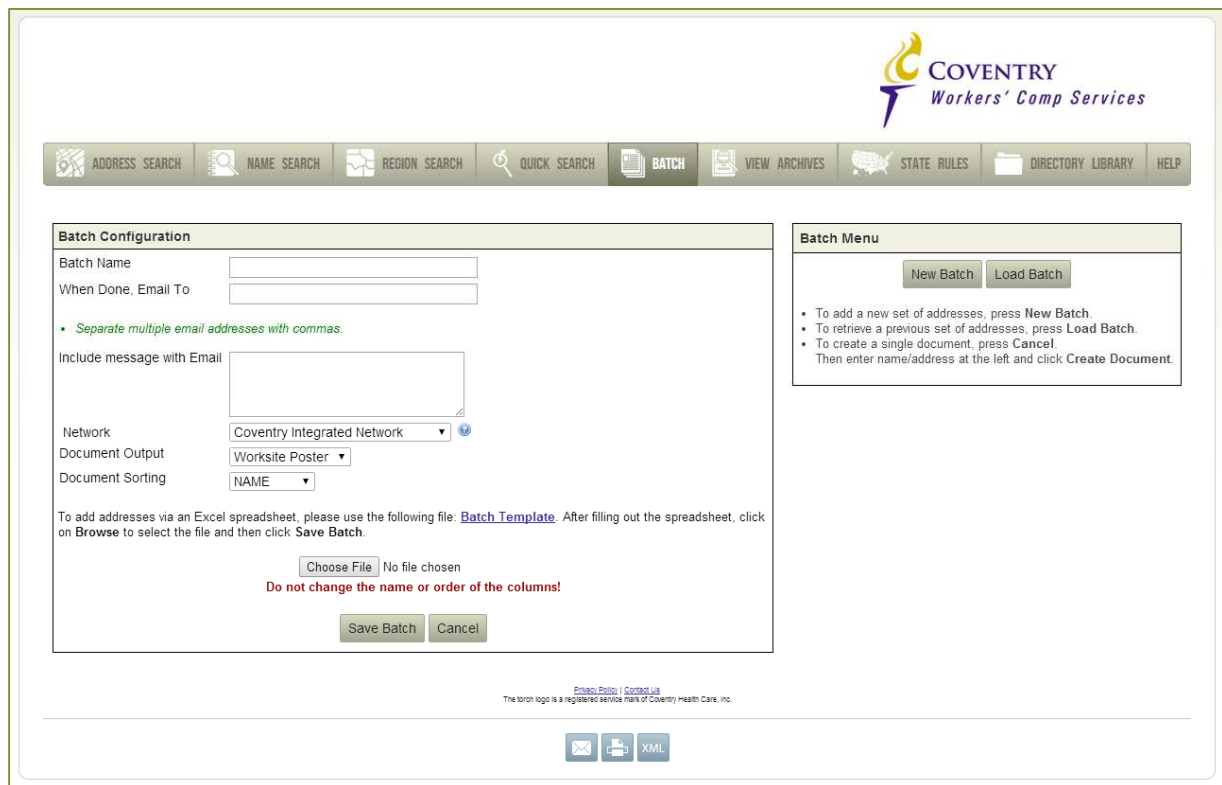
<p><b>Traynis, Arnold I., MD</b> <i>SFO Medical Clinic</i> <i>Sfo Medical Clinic</i> <i>SFO Medical Clinic</i> <i>Emergency Medicine</i> <i>Family Practice</i> International Terminal Side A Level 3 San Francisco, CA 94128 650-821-5601 <i>Err Dist: 3.3 MI</i></p>	<p><b>Waddington, Joel A., MD</b> <i>US Health/Woods Medical Group PC</i> <i>Occupational Medicine</i> 192 Beacon St South San Francisco, CA 94080 650-589-6500 <i>Err Dist: 4.3 MI</i></p>
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\* = Denotes that the original provider record has been changed.

Modified and Added Providers will appear on the final output with red crosses to the left of their name. The TalisPoint final output is presented in HTML format so your print options are controlled via your Internet browser's settings. Things like margins and whether or not a header or footer will appear on the printed output can be controlled in your browser's Page Setup section. It is recommended that WSPs be printed using 1/2" margins all around and without headers or footers.

## Batch Worksite Posters

In this section we will discuss how to create a batch of Worksite Posters (WSPs) from a standardized Excel spreadsheet you will import. From the TalisPoint Worksite Poster screen describe on page 15, you will click the New Batch button on the right-hand side of the screen which will bring you to the Worksite Posters screen below:



The screenshot shows the 'Batch Configuration' and 'Batch Menu' sections of the TalisPoint interface. The 'Batch Configuration' section includes fields for 'Batch Name', 'When Done, Email To', and 'Include message with Email'. It also features dropdown menus for 'Network' (set to 'Coventry Integrated Network'), 'Document Output' (set to 'Worksite Poster'), and 'Document Sorting' (set to 'NAME'). A 'Choose File' button is present, with a note: 'Do not change the name or order of the columns!'. The 'Batch Menu' section contains 'New Batch' and 'Load Batch' buttons, along with instructions: 'To add a new set of addresses, press New Batch. To retrieve a previous set of addresses, press Load Batch. To create a single document, press Cancel. Then enter name/address at the left and click Create Document.'

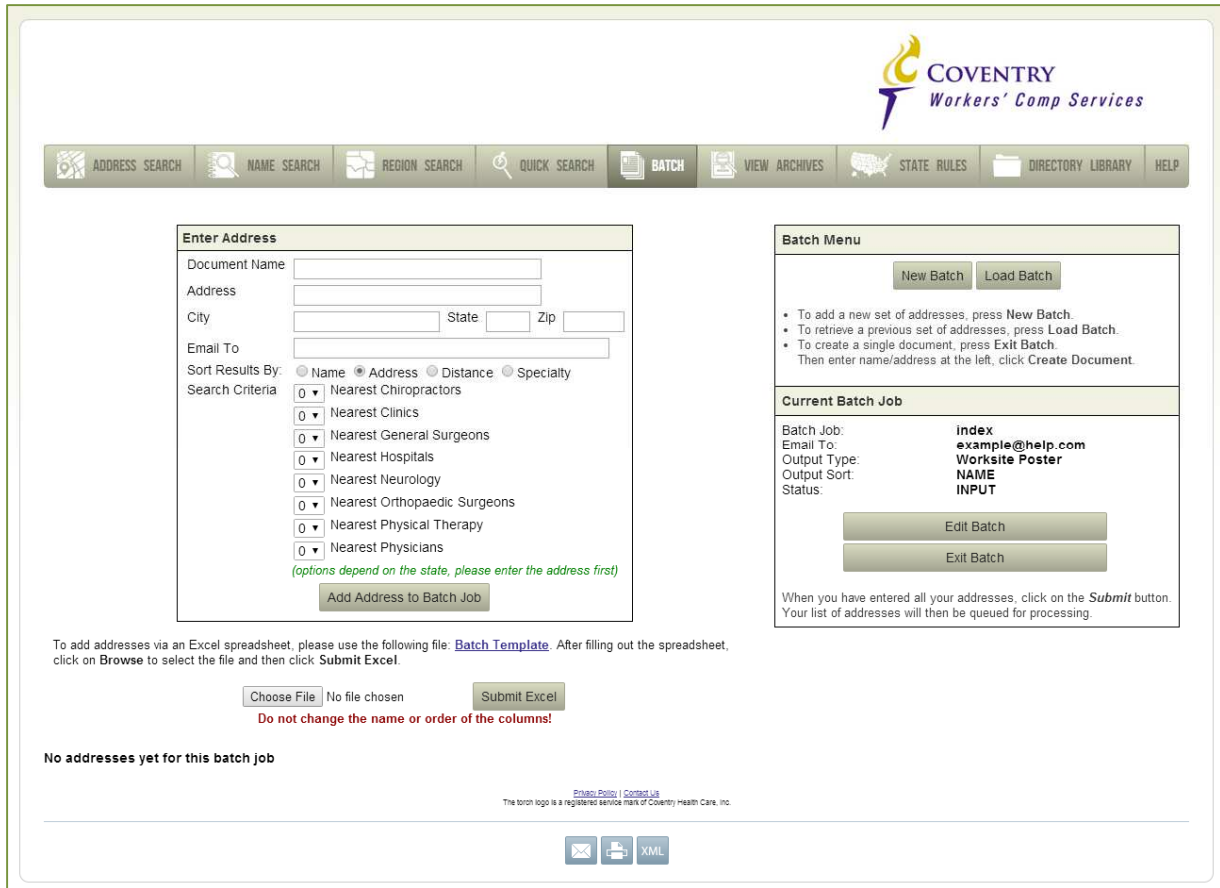
The left-side portion of the screen is for use when you want to load a brand new batch. The right-side portion of the screen is for use when you want to re-load and re-process a previously loaded batch. At the top of the left-side portion of the screen you will be asked to give your Batch a name in the **Batch Name** field. It is important to name you batch something that you can easily recall in case you need to re-retrieve it and re-process it at a later date. TalisPoint delivers batch WSPs by e-mail, so you must also input an e-mail address in the **When Done, Email To @** field in order for TalisPoint to deliver the links to the completed WSP documents once the batch is done. You may also select the Network from which you want TalisPoint to select the Providers in the **Network** drop-down box. You can change the order in which the WSPs are created by selecting a different column in the **Document Sorting** drop-down box. By default, the name column in the uploaded spreadsheet will be used to determine the order in which the WSPs are created.

If you do not have a copy of the standardized batch template, you can download one from this screen by clicking the [Batch Template](#) link. **Save this somewhere on your PC because all batches submitted to TalisPoint MUST be in this format.** The TalisPoint batch Excel spreadsheet template has a number of columns:

1. Name
  - The Employer's location name. This name will appear on the final WSP.
2. Street
  - The Employer's location street address. This Address will appear on the final WSP and will be used to determine the latitude and longitude of the starting point of the radius search for Providers.
3. City
  - The Employer location's City. The City will appear on the final WSP and will be used to determine the latitude and longitude of the starting point of the radius search for Providers.
4. State
  - The Employer location's State. The State will appear on the final WSP and will be used to determine the latitude and longitude of the starting point of the radius search for Providers.
5. Zip
  - The Employer location's ZIP Code. The ZIP Code will appear on the final WSP and will be used to determine the latitude and longitude of the starting point of the radius search for Providers.
6. nearest\_chiropractors
  - The # of Chiropractors you want to appear on the WSP.
7. nearest\_clinics
  - The # of Clinics (Occ Med, Urgent Cares, Walk-Ins) you want to appear on the WSP.
8. nearest\_general\_surgeons
  - The # of General Surgeons you want to appear on the WSP.
9. nearest\_hospitals
  - The # of Acute Care Hospitals you want to appear on the WSP.
10. nearest\_neurology
  - The # of Neurologists or Neurosurgeons you want to appear on the WSP.
11. nearest\_orthopaedic\_surgeons
  - The # of Orthopedists or Orthopedic Surgeons you want to appear on the WSP.
12. nearest\_physical\_therapy
  - The # of Physical Therapists or Physical Therapy Clinics you want to appear on the WSP.
13. nearest\_physicians
  - The # of Physicians you want to appear on the WSP.
14. custom\_input\_policy\_number
  - The Policy # you want to appear on the WSP.
15. custom\_input\_language
  - Leave blank if you only want an English WSP. If you want an English and a Spanish WSP, input an "S".

To upload your Employer location file click the **Browse** button and a standard Windows File Explorer window will open that will allow you to navigate your PC in order to locate your batch file.

When you are ready to submit the batch for processing, click the **Save Batch** button at the bottom of the screen and you will be brought to the following screen:



The screenshot shows the 'Batch Menu' section of the application. It includes a navigation bar with options like ADDRESS SEARCH, NAME SEARCH, REGION SEARCH, QUICK SEARCH, BATCH, VIEW ARCHIVES, STATE RULES, DIRECTORY LIBRARY, and HELP. The main content area is divided into two panels:

- Enter Address:** A form with fields for Document Name, Address, City, State, and Zip. It also has an Email To field and radio buttons for sorting results by Name, Address, Distance, or Speciality. A dropdown menu for Search Criteria lists various medical specialties like Nearest Chiropractors, Clinics, General Surgeons, Hospitals, Neurology, Orthopaedic Surgeons, Physical Therapy, and Physicians. A note states '(options depend on the state, please enter the address first)'. An 'Add Address to Batch Job' button is at the bottom.
- Batch Menu:** Contains 'New Batch' and 'Load Batch' buttons. Below them are instructions: 'To add a new set of addresses, press New Batch.', 'To retrieve a previous set of addresses, press Load Batch.', and 'To create a single document, press Exit Batch. Then enter name/address at the left, click Create Document.' Below this is the 'Current Batch Job' section, which displays:
 

Batch Job:	index
Email To:	example@help.com
Output Type:	Worksite Poster
Output Sort:	NAME
Status:	INPUT

 At the bottom of this section are 'Edit Batch' and 'Exit Batch' buttons.

Below the 'Enter Address' panel, there is a note: 'To add addresses via an Excel spreadsheet, please use the following file: [Batch Template](#). After filling out the spreadsheet, click on **Browse** to select the file and then click **Submit Excel**.' Below this are 'Choose File' and 'Submit Excel' buttons, with a red warning: 'Do not change the name or order of the columns!'. At the bottom, it says 'No addresses yet for this batch job' and includes a footer with 'Privacy Policy | Contact Us' and 'The torch logo is a registered service mark of Coventry Health Care, Inc.' along with icons for email, print, and XML.

If you realize you've made a mistake, you can edit the batch you've just uploaded by clicking the **Edit Batch** button in the **Current Batch Job** box which will allow you to edit each line of the spreadsheet you just uploaded. You can also configure the output by clicking the **Configure Output** button which will open a new browser window and allow you to input additional information you want to appear on each WSP in the batch.

When you are ready to actually have TalisPoint begin processing your batch, selecting Providers for inclusion on the WSPs and formatting the final output, click the **Submit Batch** button in the **Current Batch Job** box and you will be shown the addresses that were successfully loaded at the bottom of the screen. When the batch is complete, TalisPoint will send an e-mail to the address you specified with links to the final WSP output.

You may either exit the Batch screen by clicking the **Exit Batch** button in the **Current Batch Job** box or by selecting another tab page at the top of the page, such as Address Search, to jump to another portion of TalisPoint.

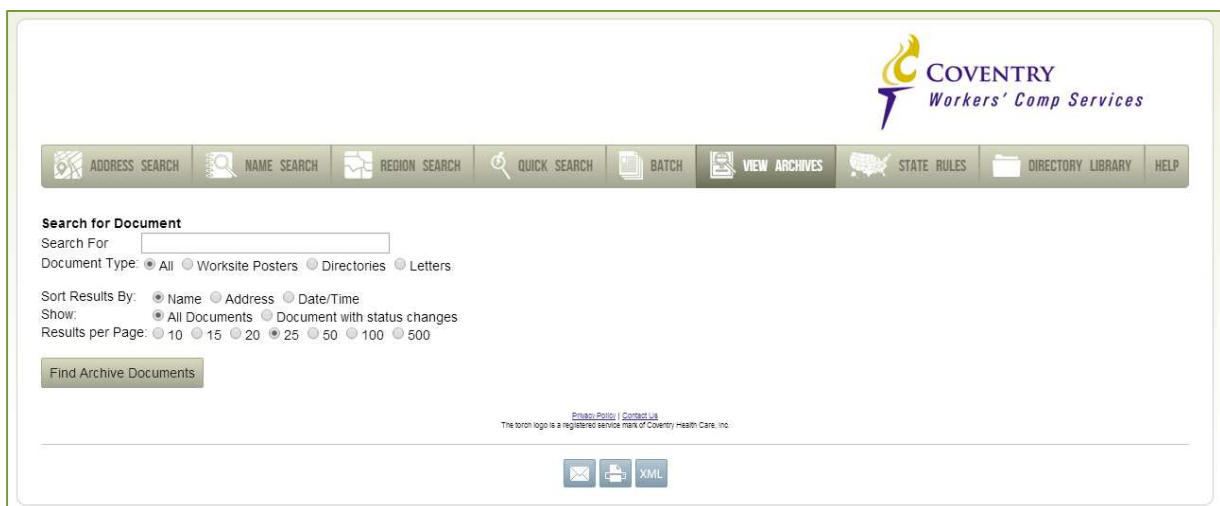
## Retrieving and Re-Processing Worksite Poster Batches

TalisPoint allows you to retrieve previously loaded Worksite Poster (WSP) batches so you can re-process them later in the year in order to keep your Employers' WSPs as up to date as possible. To retrieve a previously loaded batch, go to the Worksite Poster (WSP) page and click the **Load Batch** button in the Batch Menu box. This will take you to the list of Available Batches.

Once you find the batch you want to re-process, just click the [LOAD](#) link to the right and you will be taken to the page described on page 21, where you can edit, configure and re-submit your batch.

## View Archives

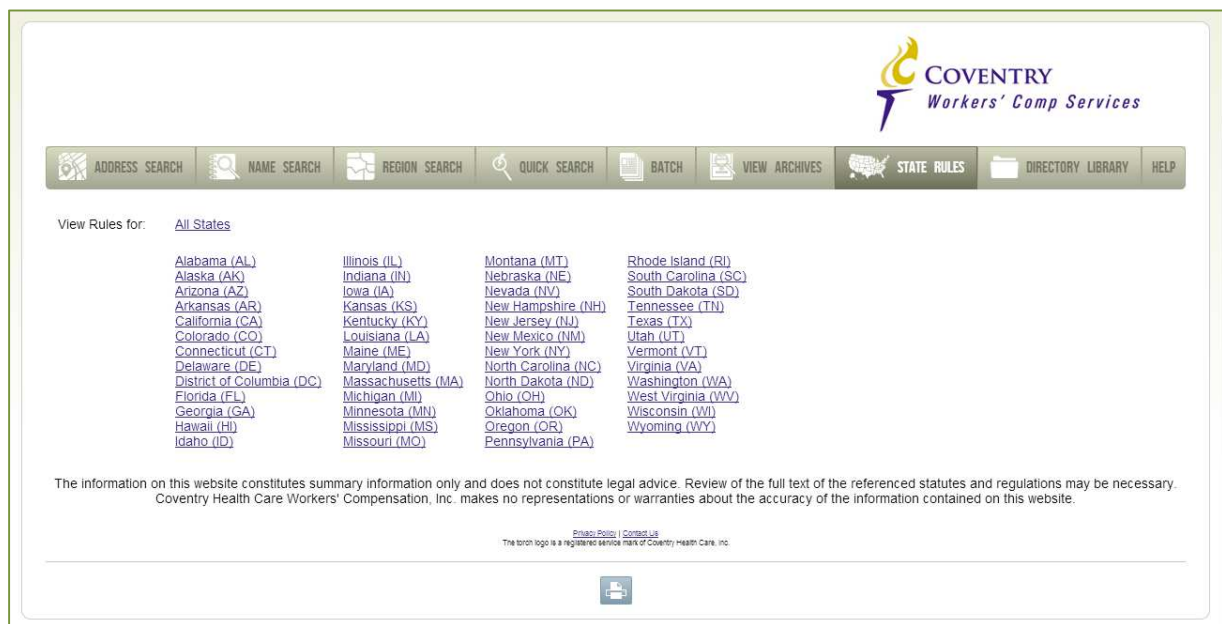
The View Archives section of TalisPoint allows you to search for saved documents, such as Directories, Worksite Posters or Letters that you have named.



This is particularly useful when retrieving commonly utilized mini-Directories created from Address Searches or single Worksite Posters. You cannot access Worksite Posters created in batch mode from this archive section. The can be found in the Batch section as described in the **Retrieving and Re- Processing Worksite Poster Batches** section above this section.

## State Rules

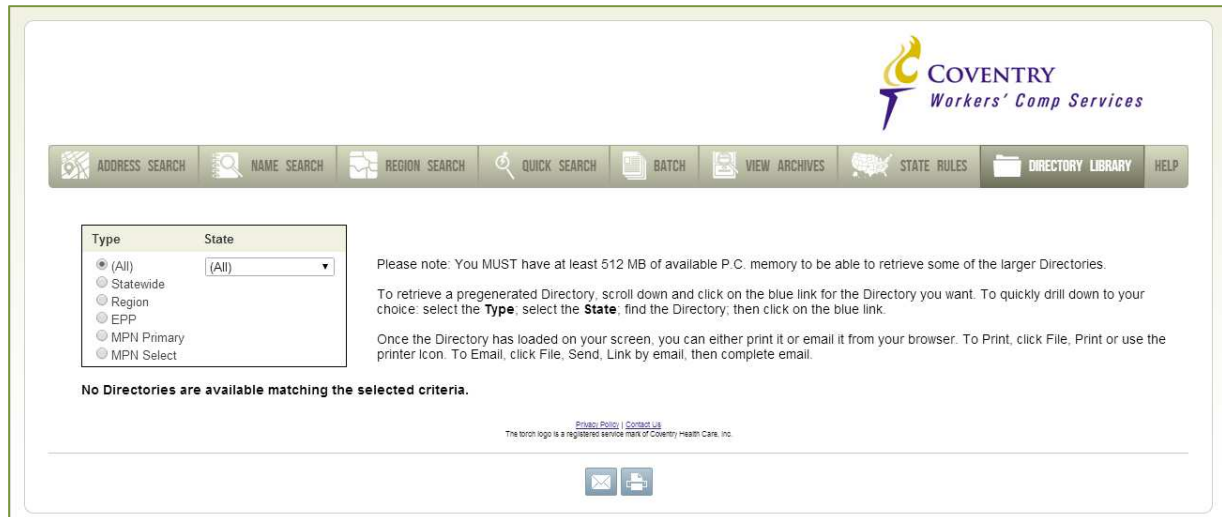
The TalisPoint State Rules section provides you with links to each State and the channeling Rules that pertain to that State. It is important to note that the information on this website constitutes summary information only and does not constitute legal advice. Review of the full text of the referenced statutes and regulations may be necessary. Coventry Health Care Workers' Compensation, Inc. makes no representations or warranties about the accuracy of the information contained on this website.



Information for each State is typically broken down into three areas: Provider Selection, Managed Care Option and Provider Lists. The Provider Selection section will contain information pertaining to who has the right to choose the treating Provider. The Managed Care Option section will contain information regarding any MCO options that may affect channeling in the State. The Provider Lists section will speak to whether or not Provider Directories or Worksite Posters may be used for channeling purposes.

## Directory Library

The TalisPoint Directory library section contains pre-generated Provider Directories. You can filter the Directories by Type and State in the box in the upper right-hand side of the screen (below):



These Directories are pre-generated once a month and since they represent a whole State, can be rather large. As noted, you MUST have at least 512 MB of available PC memory to be able to retrieve some of the larger directories.

If you have a custom Network with Coventry, there will not be a pre-generated Directory on this page that represents your custom Network. These pre-generated Directories only represent standard, non- customized Coventry Workers' Compensation Integrated Network Products. If you need a State-wide Directory of your custom Network, please contact your Coventry Account Manager for assistance.

If you have any questions about the TalisPoint website and its functionality, please contact us via e-mail at [PPO\\_Reporting@cvty.com](mailto:PPO_Reporting@cvty.com).