

CLINICAL CONFIGURATION

Best Practices Workshop

Template Management • Provider-Level Edits • Clinical Maintenance



Agenda

01

Template Management

Downloading and uploading clinical keyword templates, promoting keywords, clinical interests, and subscribing providers to templates.

02

Provider-Level Edits

Exporting and importing provider keywords, bulk-applying and bulk-promoting keywords, and setting up clinical interest fields.

03

Clinical Maintenance

Validating provider specialty accuracy and using the Clinical Configuration Dashboard.



Definitions

Clinical Configuration

Assignment of specialty label and associated clinical keywords to a provider profile to power search within the provider directory.

Clinical Keyword Template

A list of keywords relating to a specific specialty that can be applied to providers within that specialty area. Templates represent the baseline practices of the specialty.

Clinical Keywords

Clinical terms made up of conditions, symptoms, treatments, and procedures that are applied to the backend of a provider profile to aid in search on the provider directory.

Keyword Promotion

A function in which a selected keyword, either in a template or at the provider level, can be "promoted" so that when this keyword is searched, the provider results higher up in search results on the provider directory.

Specialty Label

The clinical area in which a provider specializes in. The specialty label should reflect how the provider practices, not necessarily how they are credentialed.

Clinical Interest

A function in which a selected keyword, either in a template or at the provider level, can be selected to display within the provider profile.



Best Practices—Key Takeaways

TEMPLATES

Start new or uploaded templates from the standard library so clinical keywords match the library exactly.

PROMOTION

Promote keywords at the template level to route by specialty; reserve provider-level promotion for individual exceptions.

CLINICAL INTERESTS

Five or fewer clinical interests per provider keeps profiles easy for patients to read and helps the right ones stand out.

SUBSCRIPTIONS

Subscribe providers only to general specialty templates, not highly specialized ones, to preserve edit flexibility.

SPECIALTY ACCURACY

Validate that a provider's specialty reflects how they actually practice, not just how they're credentialed.

MONITORING

Use the Clinical Configuration Dashboard to regularly find providers missing a specialty or clinical keywords.

Frequently Asked Questions

Guide for Providers + Provider Directory Best Practices

WHEN **Wednesday, September 9 • 12:00 – 1:00 PM ET**

Great client questions over the past few months—from configuring provider and location data to layering in Guide AI and richer website content—inspired this session to bring the answers together in one place.

What we'll cover

How they work together

An overview of how Guide for Providers and Provider Directory complement each other.

Key differences

How to confidently position the right solution for your needs.

Live demo

Configuration scenarios so you can see what's possible for your setup.

Best practices & Q&A

What's worked well across our client base, plus time for your questions.

Have a use case you'd like covered? Reply ahead of time or drop it in the chat during the session.