Add New Practice

Last Modified on 10/21/2024 1:18 pm EDT

Follow the steps below to add a New Practice.

1. Select **Customer Setup** > **Practices**.
2. Click the **New Practice** button.
3. Add the **Practice Name**.
4. Enter the **provider's NPI** number. Or click the 🔍 to search the **NPPES NPI Registry** for all NPI records of Healthcare Providers.
    1. When the **NPI Registry** window opens, select the **NPI type.**
    2. Enter your **Search Criteria**.

        > Searching with a partial name or are unsure of the spelling? It must be followed by an asterisk *
        >
        > Failure to add the wildcard (*) will result in the registry only searching for an exact match and may not pull up the record you are searching for. (i.e., When searching for "*James Jones*"" type in "*Jame**" in the first name field and "*Jon**" in the last name field so it pulls up all records that include "*Jame*" and "*Jon*" in the first/last name).

    3. Click the **Search** button.
    4. A window will open displaying the **NPI numbers** that **match** your search results.
    5. Select the **NPI** you would like to add.
5. Select the **Organization Type** from the drop-down.
6. Enter the **Taxonomy Specialty** that defines the Practice's area of **specialization.** Or click the 🔍 to select one from the list.
7. The **Sequence Number** is auto-populated by CollaborateMD.
8. ***Optional***: Enter a **Reference #:** This is for personal reference. This field is informational and does not appear on claims. This can be used to help you easily identify a practice or used for reporting purposes
9. ***Optional***: Add a **TCN Prefix:** Use this to populate a value to the beginning of the Transaction Control Number (TCN) that CollaborateMD sends to Change Healthcare once a claim is generated for this practice. This TCN value will be present on any subsequent Clearinghouse or Payer-generated report that are returned. This is a quick and easy way for billing services to determine which customer claims

are associated to.

10. ***Optional*: Add a Statement TCN Prefix:** Use this to populate a value to the beginning of the patient statement's TCN (invoice) number for automated and enhanced statements. This helps offices by allowing customers to display a custom identifier on their statements. When added, the statement's invoice number will show the TCN prefix, followed by a dash and the TCN, allowing billing services to easily determine which customer a statement is associated with.

11. ***Optional*: Add a Code:** Use this field to enter a code of up to three (3) alphanumeric characters to help you identify this practice.

12. Enter the **Primary Office contact Information** (e.g., address, 9-digit zip code, phone, fax, email).

13. Verify if the **Pay-To Address** that prints in Box 33 (of the CMS-1500 form) or Box 2 (of the CMS-1450 form) are the same as the primary office.

    1. ***Defaulted***: Is the **Pay-To address is the same as the primary office?**

    2. Is the Pay-To-Address **differ**ent than the primary office? Uncheck the **Pay-To address is the same as the primary office** box and populate the other address.

14. ***Optional***: If your Practice has Other Offices, you may need to enter information regarding any additional locations your practice may have.

    > **Important**: Other Offices must use the same Name, Tax ID/Social Security Number and the same Pay-To Address as the Main Practice; the NPI number can be different.

15. ***Optional***: Set your Practice Defaults for claims, patients, and payments.

16. Click **Save**.