dd a New Provider

t Modified on 05/16/2025 5:15 pm EDT

Who can add new providers?

Users with the Account Setup & Providers permissions can add a new Provider with an existing Tax ID.

Users with the Bill Payment, Account Setup & Providers permissions can add a new Provider with a new Tax ID.

ollow the steps below to add a New Provider.

1. Select **Customer Setup** > **Providers**.
2. Click the **New Provider** button.
3. Enter the provider **Last Name, First Name, MI** & **Credentials**.
4. Add the **provider's NPI** number. Or click the  icon to search the **NPPES NPI Registry** for all NPI records of Healthcare Providers.
    1. Once the **NPI Registry** window opens, select the **NPI type**.
    2. Enter your search criteria and click **Search**.

    ⚠ If you're searching with a partial name or are unsure of the spelling, it must be followed by an asterisk * (i.e. When searching for the "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). 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.

    3. A window will open displaying the **NPI numbers** that **match** your search results.
    4. Select the **NPI** of the Provider you would like to add.
5. The **Sequence #** is auto-populated by CollaborateMD.
6. Enter the **Taxonomy Specialty** that defines the Provider's area of **specialization**. Or click on the  icon to select one from the list.
7. A **Reference #** can be created to further identify the provider.
8. Enter a **Code** you would like to associate with the provider

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9. Use the icon to select the **Default Practice** for this provider.

> **Important**: Once the provider has been saved, the practice listed in this field **cannot be changed.**

10. For **Bill claims under**, use the icon to select the **Billing Provider** that should be used for the claim.

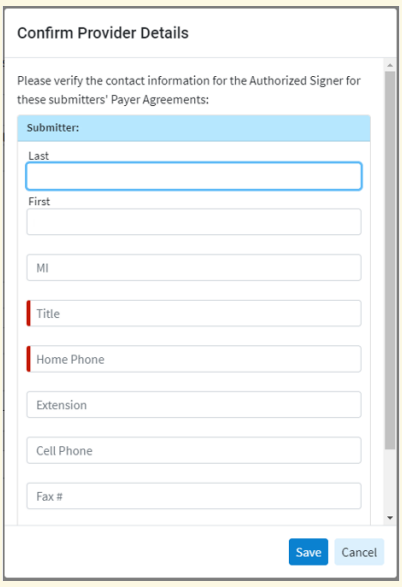
> Leave as **SELF** if this provider is the Billing Provider.

11. Use the icon to select the provider to **Check eligibility under**.

> Leave as **SELF** if this provider will submit eligibility requests to the payer themselves.

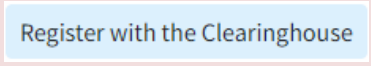
12. Select which **Tax ID number (SS/EIN)** this provider will use, and enter it into the field.

> ⚠ Whenever a new provider with a new Tax ID is added, a prompt appears requesting the details of the authorized signer for the payer agreements associated with this submitter. An authorized signer is an individual designated by the customer/owner to sign and handle payer agreements for a submitter/Tax ID. This authorized signers name, title, and phone number must be entered in order to complete the new provider process.



13. Select whether this provider will **Bill as** an **Individual** or a **Group**.
14. **Professional Mode/Institutional Mode**: Authorized Reps and Admins with the Account Setup permission can move Provider(s) into Production Mode once a Submitter Number is assigned to the Provider(s).
    1. **Production Mode:** Claims will be submitted to the payer for processing.
    2. **Test Mode:** Claims **will not** be submitted to the payer for processing, and only sent to the Clearinghouse.
    3. **Hold Mode**: Claims **will not** be submitted to the payer or Clearinghouse. Claims will stay in CollaborateMD.
15. Enter the provider's **Contact Information** (e.g., phone, fax, cell phone, email).
16. Add any applicable **ID Numbers** by referencing the **Provider Field Descriptions** below.
17. Enter any applicable Claim Defaults:
18. ***Optional***: Use the  icon to select a **Default Revenue Code** to associate with this provider.
19. ***Optional***: Use the  icon to select a **Default** Facility to associate with this provider.
20. Click **Save**.

Important: If adding a new provider with a new Tax ID, a payment window will be shown to collect the one-time payment. The provider will not be registered with the clearinghouse if the payment fails. Claims cannot be submitted electronically, eligibility cannot be checked, and agreements cannot be started until the provider has been registered.

Once you have corrected the payment information, please open the provider Provider Name (#sequence number) and click the 

button to register the provider.