


WebPT Ongoing Maintenance

† Modified on 01/07/2025 5:29 pm EST

The below steps are to be taken to maintain the interface after all initial exports and imports are done and the interface is "live."

New Patients need to be added after the WebPT interface has been turned on, **add & modify patient demographics into WebPT only.**

 When a patient's demographic is updated within WebPT, only the **Patient Info** tab within the Patient section of CMD will be updated. Patients notes are not supported and can not be updated through the interface. The Insured information within the **Insurance** tab will only be updated once a new encounter has been sent over from WebPT.

New Payers need to be added after the WebPT interface has been turned on, add them into CollaborateMD first, then into WebPT:

- The **CMD Sequence Number should be copied** from the New Payer and **added into WebPT in the Alternate ID field** (within WebPT's Payer section).
- See the [Payer Help Article](#) for more information.

New Facility(s) need to be added after the WebPT interface has been turned on, add them into CollaborateMD first, then into WebPT:

- The **CMD Sequence Number** from the New Facility(s) should be copied down and provided to WebPT over the phone so that the New Facility(s) can be added.
- In addition, you will need to **add the CMD Sequence Number in the Alternate ID field** (within WebPT's Facility section.)
- See the [Facility Help Article](#) for more information.

New Referring Providers need to be added after the WebPT interface has been turned on.

- All New Referring Providers are to be **added into both CollaborateMD and WebPT.**
- While the order it is performed does not matter, **it is required that the Provider NPI's match.**
- See the [Referring Provider Help Article](#) for more information.

New Providers need to be added after the WebPT interface has been turned on.

- All New Providers are to be **added into CollaborateMD first and then WebPT.**

- The **CollaborateMD sequence number should be copied** from the new provider and **added into the WebPT Alternate ID field** (with WebPT's Payer section). **It is required that the Provider NPI's match in both systems.**
- See the [Provider Help Article](#) for more information.

New CPT/HCPCS Codes need to be added after the WebPT interface has been turned on, add them into CollaborateMD. If you want to default the Revenue code in the CPT/HCPCS code, reference our [Procedures Codes Claim Defaults Help Article](#) for more information.

Should you have any questions regarding the necessary ongoing maintenance, please [Contact Us](#) or [WebPT](#) for further assistance.
