


WebPT

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WebPT Ongoing Maintenance

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

If **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.

If **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.

If **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.

If **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.

If **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.

If **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 [Procedure 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.
