

# Referring Provider Alerts

† Modified on 09/23/2024 9:02 am EDT

## Add a Referring Provider Alert

CollaborateMD now allows you to add specific alerts to your referring providers. Alerts will appear as a pop-up whenever the referring provider is opened in any crucial section of the CollaborateMD application. Using alerts helps ensure your team is aware of any important information associated with your referring providers.

CollaborateMD uses the Referring Provider section to save/store referring providers, ordering providers, and sales reps. This means that in some scenarios the referring provider alert pop-up will be based on the claim's current referring provider, ordering provider, or sales rep fields.

1. Select **Customer Setup > Referring Providers**.
2. Use the **Show All** button to view all providers. Or use the **Search** field to further drill down your search.
3. Select the **Referring Provider**.
4. Locate and click on **Alerts** from the right-hand side panel.
5. Click **Add Alert**.
6. **Write the message** you would like to have appear in the alert pop-up.
7. Use the **Display Options** boxes to determine when you would like the alert to appear.
  1. **Show Alert in Patient Section:** (based on the patient's default referring provider).
  2. **Show Alert in Claim Section:** (based on the claim's current referring provider, ordering provider or sales rep).
  3. **Show Alert in Appointment Section:** (based on the patient's default referring provider).
  4. **Show Alert in Payment Section:**
    - For patient payments: It will be based on the patient's default referring provider.
    - For insurance payments EOB/ERA: It will be based on the claim's current referring provider, ordering provider, or sales rep.
8. The **Effective Date Range** allows you to set how long the alert should remain active.
9. Click **Done** to add your alert.

10. Click **Save**.

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