

How to Create an Office and Edit the NPI, Tax ID, POS and Billing Name

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Please follow the below steps to create an office:

1. Hover over the **Account** and Select **Offices**.

Account Marketplace

ACCOUNT SETTINGS

- User Settings
- Provider Settings
- onpatient Settings
- Account Setup
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory

PRACTICE SETTINGS

- Offices**
- Facilities

2. On the right of the screen, click on **+ Add New Office** and enter the information in the **Basic** tab. (Example: Office name, Facility name, Address, Number/Name for Exam Rooms, etc.)

Manage offices ?

Active Offices

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[+ Add New Office](#)

Name Provider	Address	City	Phone	Facility Code	# Exam Rooms	Online Schedule	Sharing
☰ Surgery Room Fabian Newman	1001 N Rengstorff Ave # 200	Mountain View	718-878-5383	22	4	Existing Patients New And Follow Ups	Share View Edit Archive
☰ Jones Rd Fabian Newman	123 Jones RD	Mountain View		11	1	New And Existing Patients All Appointments	Share View Edit Archive
☰ Gospel Room Fabian Newman	123 Ave	Los Angelas		21	4	None But Visible To Patients	Share View Edit Archive

3. Click on the **Billing** Tab and choose the Place of service/POS (For example 11 for your medical office location) from the **Facility Code** dropdown. (2nd line listed)

4. If you provide services outside of your medical office and away from where you would receive your reimbursements, please be sure to fill out the **Billing Provider Office** section. This will control what information (office/address) appears in box 33 of the HCFA-1500 form, and which address payments or correspondence could be sent.

- You may need to set up a separate **Pay-to-Address** office as a placeholder to use for this purpose. Otherwise, you can use an existing office location if that is where you normally receive your payments.

New Office

Basic Billing Online Schedule

Billing name	<input type="text"/>	Leave it blank if same to account settings.
Facility Code	11 - Office	▼
Billing Provider Office	-----	▼ Professional medical billing only.
Use facility NPI number in box 32a of HCFA form	<input type="checkbox"/>	
Facility NPI number	<input type="text"/>	Used in HCFA box#32a and UB04 box#56
Facility provider number	<input type="text"/>	
Billing Tax ID # (professional)	<input type="text"/>	Leave it blank if same to account settings.
Billing NPI number	<input type="text"/>	Leave it blank if same to account settings.
CLIA Number	<input type="text"/>	CLIA # for billing. Leave it blank if same to account setting.
CLIA Expiration Date	<input type="text"/>	Expiration date for CLIA number.
Use alternate pay to address for EDI	<input type="checkbox"/>	use alternate "pay to" address in EDI billing if checked.
Use alternate pay to address for HCFA	<input type="checkbox"/>	use alternate "pay to" address in HCFA form block 33 if checked.
Use alternate pay to address in Patient Statement	<input type="checkbox"/>	use alternate "pay to" address in patient statement if checked.

Save

5. If the Billing NPI, Tax ID, and Practice official are the same from Account > Settings, please leave the fields blank and click on **Save**.

The hierarchy of populating TIN/NPI information on claims is:

1. Account Settings (above)

2. Insurance Set-Up

- If there is an entry for specific insurances under Insurance Set Up, that entry will override the information listed under account settings for that payer.