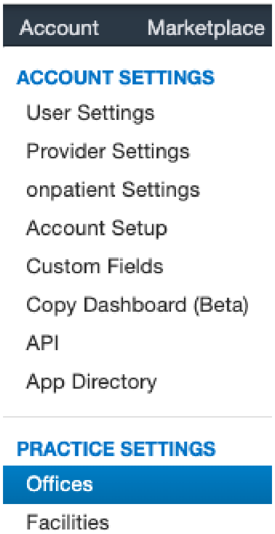
How to Create an Office and Edit the NPI, Tax ID, POS and Billing Name

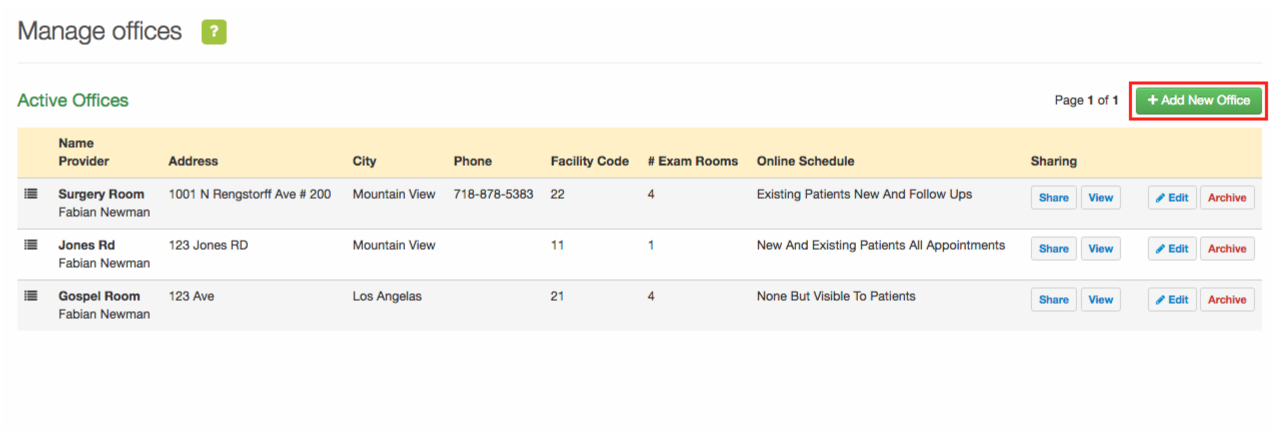
07/24/2024 4:45 pm EDT

Please follow the below steps to create an office:

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



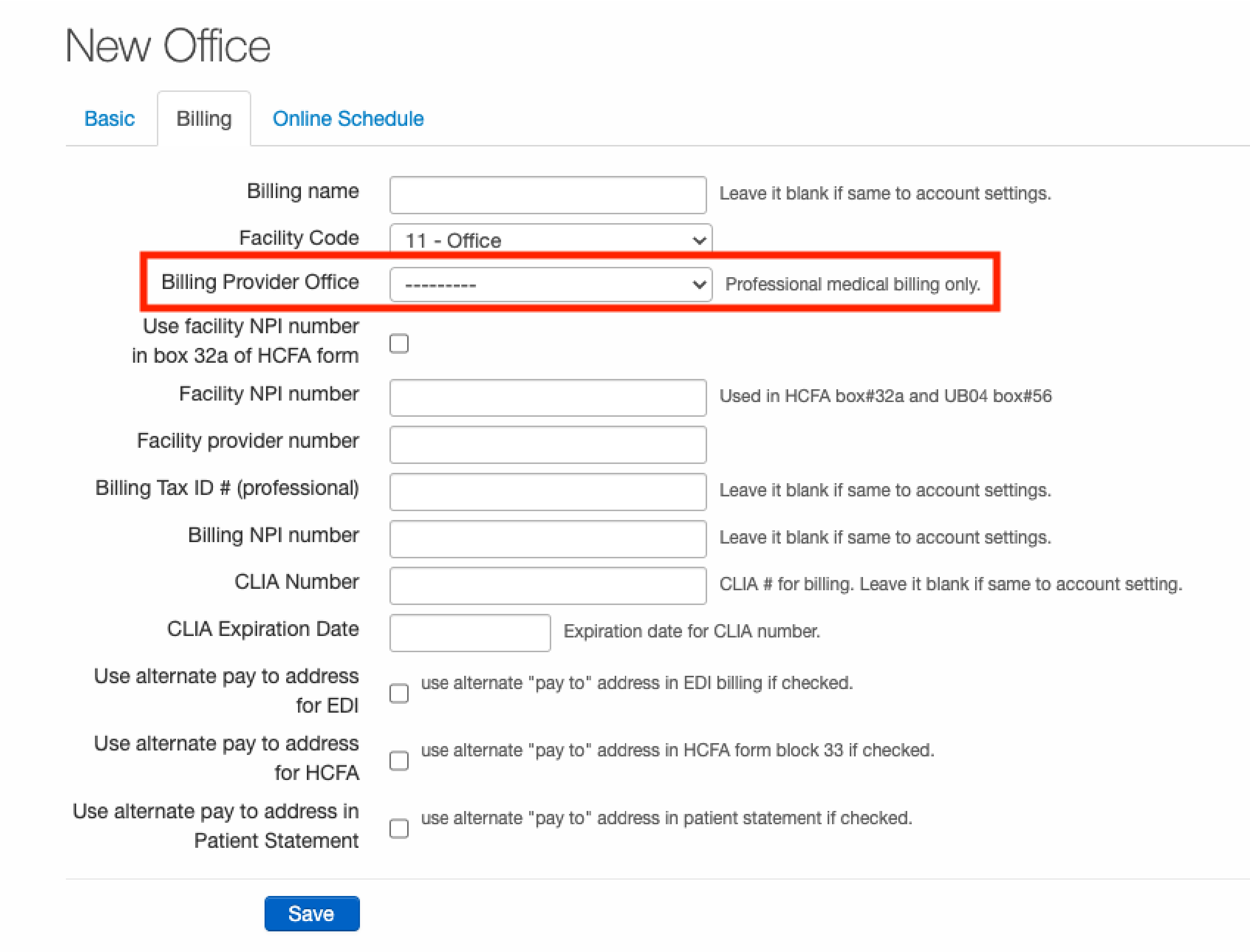
2. On the right of the screen, click on **+ Add New Office** and enter the information in the **Basic** tab. *(Example: Office name, Facility name, Address, Number/Name for Exam Rooms, etc.)*



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.



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.