

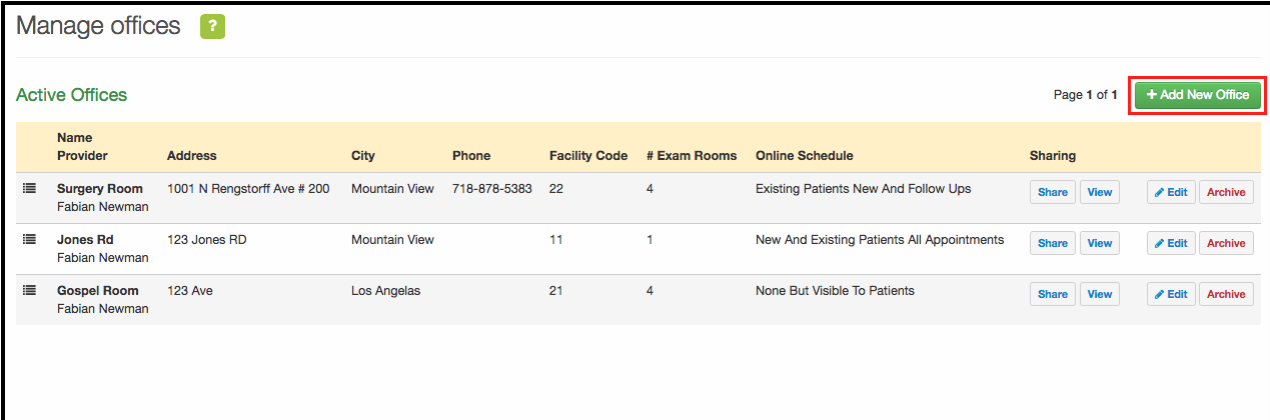
# How to Create an Office and Edit the NPI, Tax ID, POS and Billing Name

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Please follow the below steps to create an office:

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

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.)



The screenshot shows a 'Manage offices' interface with a table of active offices. The table has columns for Name, Provider, Address, City, Phone, Facility Code, # Exam Rooms, Online Schedule, and Sharing. Three offices are listed: Surgery Room, Jones Rd, and Gospel Room. A '+ Add New Office' button is highlighted in the top right corner.

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 Offices** 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.