# How can I enter in an official practice name and have that reflected in my clinical notes, superbills, and patient statements?

07/08/2024 8:02 pm EDT

1. To enter your official practice name, navigate to **Account** > **Provider Settings**.



2. Select the **Medical Billing** tab. In the third field, titled **Practice Official Name**, enter in your desired name.



3. While you are here if you would like to include your practice name on Patient Statements, scroll down to the **Patient Statements** section and check the box next to **Use Office Name.**

## Patient Statement

| | | |
|---|---|---|
| Business Logo | Top Left | Include Business Logo in patient statements. |
| Pay to Address | Eastern Office | Hunt Valley , MD 21031, USA \| Hunt Valley \| MD \| 21031 |
| Use Office Name | ☑ | Use the Practice Official Name (if available) for patient statement and payment receipt. |
| Pay CC by Call | ☑ | Show "To pay by credit card, call [office number]" in patient statement. |
| Credit Card Accepted | ☑ | Visa |
| | ☑ | Mastercard |
| | ☑ | Discover |
| | ☑ | American Express |

4. Scroll down and click **Update Entire Profile** to save your changes.

**Update Entire Profile**

5. Next, move over to the **General** tab to make sure the official name is reflected in the Clinical Note.

## Account Settings

Profile  General  Email  Medical Billing  eRx Info  Services  Usage  My Billing  Sample Data  Security  Patient Payments

## Calendar Settings

6. Scroll down to the **Clinical Notes** section, and check the box next to **Include Practice Official Name**.
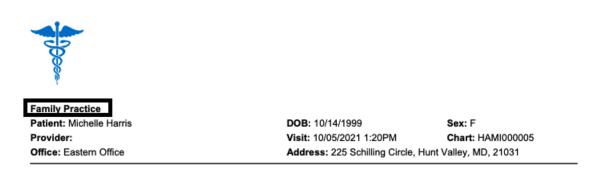
## Clinical Notes [?]

| | | |
|---|---|---|
| Include Practice Official Name | ☑ | Print practice official name in header. Name can be set in "Medical Billing" Tab |
| Default Supervising Provider | --------- ⌄ | |
| Include Business Logo | Top Left ⌄ | |
| Include Patient Chart Photo | ☐ | |
| Include Office Information | ☑ | Include office name and address in the headers of clinical notes |
| Include Payer IDs | ☐ | Include primary and secondary payer IDs in the headers of clinical notes |
| Include Lab Orders and Results | ☑ | Show Lab Orders and Results in the plan section of clinical notes |
| Reduce Header and Footer Font Size | ☑ | |
| Move Non-SOAP FreeDraws to End | ☐ | |
| Default to CDC Growth Charts | ☐ | |
| Hide Medications & Allergies by Default | ☐ | |
| Hide CPT & ICD on Clinical Notes by Default | ☐ | |
| Allow Chief Complaint to be Persistent | ☐ | |
| Preview Previous Note | ☑ | Show the information that will be copied from a previous note in the selection screen. |

7. Make sure to click **Update Entire Profile** at the bottom of the page to save your profile.

**Update Entire Profile**

8. When you open a clinical note and click **Preview Note**, the official practice name will appear in the header.

**Family Practice**
**Patient:** Michelle Harris
**Provider:**
**Office:** Eastern Office

**DOB:** 10/14/1999          **Sex:** F
**Visit:** 10/05/2021 1:20PM          **Chart:** HAMI000005
**Address:** 225 Schilling Circle, Hunt Valley, MD, 21031

The practice name will also appear on your superbills and patient statements.

# Patient Receipt

**Appointment Date:** Fri Dec 15, 2023 1:15PM

Provider Information:

**Family Practice**
**Dr. James Smith**
**Billing NPI:** 1234567890
**Provider NPI:** 3333333333
**Provider EIN:** 112233444

**Place of Service Code: 11**
225 Schilling Circle
Hunt Valley, MD 21031

**Office Phone:** (443) 555-5555
**Office Fax:** 301-555-5555
**Email:**

Patient Information

**Patient Name:** Test Patient Jr
**Date of Birth:** June 27, 1992

**Patient Address:**

**Patient Phone:** (301) 555-5555

**Family Practice**
345 Fake Street
Baltimore, MD 12345

| Statement ID: 248094-100103542-PREVIEW | | |
|---|---|---|
| **Statement Date** | **Pay This Amount** | **Chart ID** |
| 12/13/2023 | $410.00 | SAJA000001 |
| **SHOW AMOUNT PAID HERE:** | **$** | |

**Laurie Test Sample**
123 Fake St
Sunnyvale, CA 94089

**MAKE CHECKS PAYABLE / REMIT TO:**

**Family Practice**
345 Fake Street
Baltimore, MD 12345

For questions about billing, call (410) 555-5555. To pay by credit card, call (410) 555-5555.
You can also pay by credit card online at onpatient.com - If you don't have access, call (410) 555-5555 to request an account.