

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**.

The screenshot shows a navigation menu with two main tabs: "Account" and "Marketplace". Under "Account", there is a sub-section "ACCOUNT SETTINGS" with several options: "User Settings", "Provider Settings" (highlighted in blue), "onpatient Settings", "Account Setup", and "Custom Fields".

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

Account Settings

The screenshot shows a horizontal row of tabs: "Profile", "General", "Email", "Medical Billing" (selected), "eRx Info", "Services", "Usage", "My Billing", "Sample Data", "Security", and "Patient Payments".

Medical Billing

The screenshot shows a form with the following fields and labels:

Billing NPI	1234567890	Required for eRx & billing. Group NPI can be same as rendering NPI #
Rendering Provider NPI	5555555555	Individual Provider NPI #. Leave blank if the same as billing NPI
Practice Official Name	Family Practice	
Practice Tax ID	123456789	
CLIA Number	25D2162109	Optional: For CLIA certified labs
CLIA # Expiration	01/15/2021	Optional: Expiration date of CLIA #
Billing Taxonomy Code	207Q00000X	Optional: Leave blank to let the system choose
Rendering Taxonomy Code	207Q00000X	Optional: Leave blank to let the system choose
Individual Medicare PTAN		
Group Medicare PTAN		
Individual BCBS Number		
Group BCBS Number		

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	<input type="text" value="Top Left"/>	Include Business Logo in patient statements.
Pay to Address	<input type="text" value="Eastern Office"/>	Hunt Valley , MD 21031, USA Hunt Valley MD 21031
Use Office Name	<input checked="" type="checkbox"/>	Use the Practice Official Name (if available) for patient statement and payment receipt.
Pay CC by Call	<input checked="" type="checkbox"/>	Show "To pay by credit card, call [office number]" in patient statement.
Credit Card Accepted	<input checked="" type="checkbox"/>	Visa
	<input checked="" type="checkbox"/>	Mastercard
	<input checked="" type="checkbox"/>	Discover
	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	Print practice official name in header. Name can be set in "Medical Billing" Tab
Default Supervising Provider	<input type="text" value="-----"/>	▼
Include Business Logo	<input type="text" value="Top Left"/>	▼
Include Patient Chart Photo	<input type="checkbox"/>	
Include Office Information	<input checked="" type="checkbox"/>	Include office name and address in the headers of clinical notes
Include Payer IDs	<input type="checkbox"/>	Include primary and secondary payer IDs in the headers of clinical notes
Include Lab Orders and Results	<input checked="" type="checkbox"/>	Show Lab Orders and Results in the plan section of clinical notes
Reduce Header and Footer Font Size	<input checked="" type="checkbox"/>	
Move Non-SOAP FreeDraws to End	<input type="checkbox"/>	
Default to CDC Growth Charts	<input type="checkbox"/>	
Hide Medications & Allergies by Default	<input type="checkbox"/>	
Hide CPT & ICD on Clinical Notes by Default	<input type="checkbox"/>	
Allow Chief Complaint to be Persistent	<input type="checkbox"/>	
Preview Previous Note	<input checked="" type="checkbox"/>	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	DOB: 10/14/1999	Sex: F
Patient: Michelle Harris	Visit: 10/05/2021 1:20PM	Chart: HAMI000005
Provider:	Address: 225 Schilling Circle, Hunt Valley, MD, 21031	
Office: Eastern Office		

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

Patient Address:

Patient Phone: (301) 555-5555

Date of Birth: June 27, 1992

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.

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