

4B. (7) Software Set Up – Other Providers (Referring/Supervising)

This section will allow you to **Add, Edit, or Delete** a Referring (or Supervising) Provider. The Referring Provider information will appear in boxes 17, 17A, and 17B of the HCFA/CMS 1500 Claim Form. From the Top Navigational Menu, select “**Set Up**”, and then “**Other Providers**”.


The screenshot shows a dialog box titled "Edit New Referring Physician Data". It contains the following fields:

- ID Code: [Text Box]
- Last Name: [Text Box]
- First Name: [Text Box] MI: [Text Box]
- Title: [Text Box]
- Insurance: [Dropdown Menu] (Blue Cross 1A)
- NPI: [Text Box]
- Address: [Text Box]
- Phone: [() - ext]
- Fax: [() -]
- Cell: [() -]
- Zip: [Text Box]
- City: [Text Box]
- State: [Dropdown Menu]

Buttons: Save (Green checkmark), Cancel (Red X)

1 Adding a Referring/Supervising Provider

Click on the “**Add**” button at the bottom of the “**Referring Physician**” screen to open a blank “**Edit New Referring Physician Data**” screen.

 **Quick Tip!** You can also add a **Referring/Supervising Physician** while entering a Patient’s demographic information in the Patient Record or while creating their claim.

- A In the **ID Code** field, create a code name or number for this Provider which will allow you to identify whom the provider is when the code appears on various screens and reports. For example: John Smith, MD would be coded as SMIJO or SMITH.
- B In the **Last Name** field, enter the Provider’s Last Name.
- C In the **First Name** field, enter the Provider’s First Name.
- D In the **MI** field, enter the Provider’s middle initial.
- E In the **Title** field, enter the Provider’s title or degree (M.D., etc.).
- F From the menu provided, select the Provider ID number type which matches the type of medical insurance (**Medicare, Medicaid, Blue Cross, Blue**

Shield, Champus, or Commercial) that the Patient whom was referred to you by this provider has, and use that Provider number in the field to the right of this box. (For example: if this provider referred to you a **Medicare** Patient, select **Medicare** from the menu and then enter the provider's **Medicare ID number** in the box to the right.) This number will appear in box 17A of the HCFA/CMS 1500 Claim Form.

Note: If the same Provider refers Patients of different insurance types to your office, you need to create a **new entry** for the Provider. You may want to create an **ID Code** that matches the Provider ID number type you will be entering such as MSMI for a Provider last name Smith using his Medicare number, or MCSMI for the same provider using his Medicaid number.

- G In the **NPI** field, enter the Provider's NPI number. This number will appear in box 17B of the HCFA/CMS 1500 Claim Form.
- H Enter the Provider's **Address, Zip, City, State, Phone, Fax** and **Cell** numbers in the fields provided.
- I Click "**Save**" when done.

2 Editing A Previously Entered Referring/Supervising Provider

From the Top Navigational Menu, select "**Set Up**", then "**Other Providers**".

- A Left click on the Provider you want to edit, and either click on the "**Edit**" button at the bottom of the screen or double-click on the Provider's name to open it.
- B Make the necessary changes to the information in the "**Edit Referring Physician Data**" screen.
- C Click "**Save**" when done.

3 Deleting an Entered Referring/Supervising Provider

From the Top Navigational Menu, select "**Set Up**", then "**Other Providers**".

- A In the opened "**Referring Physician**" screen, left click on the name of the Provider you want to delete.
- B From the bottom of the screen, click on the "**Delete**" button, and, if you are certain that you want to delete this Provider, answer "**Yes**" when asked if you are sure you want to delete it.

Note: When attempting to delete the Provider, should a message appear stating "**Cannot Delete. Data in Use**", click the "**Ok**" button to close the message window. Then, click the "**In Use**" button at the bottom of the "**Referring Physician Data**" screen. A "**Referring Physician Data in Use**" screen will open listing the **Last Name, First Name, and Patient Account Number (PAN)** of the

Patients which are using this Insurance within their claims or their record. The Referring/Supervising Physician information must first be removed from all the Patient claims and records that appear on this list before being able to delete this Provider.