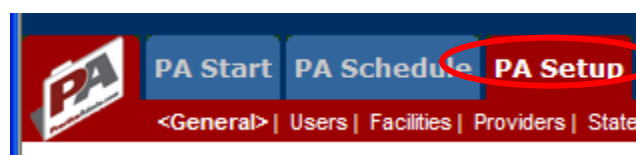


Features:

- Ability to manage provider information—including billing providers, referring providers and providers for scheduling purposes only.
- Ability to manage all provider PINs, state licenses, and other provider information.
- Identifies providers that are on hold for electronic transmission.

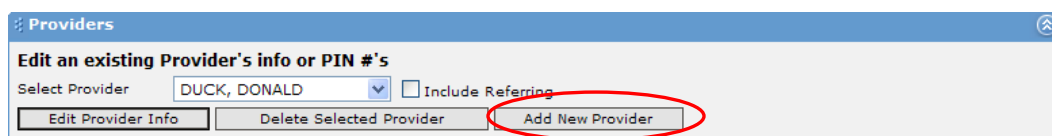


Step 1 – PA Setup

Ensure that all facilities and general info have been entered in PA Setup.

Step 2—Add New Provider

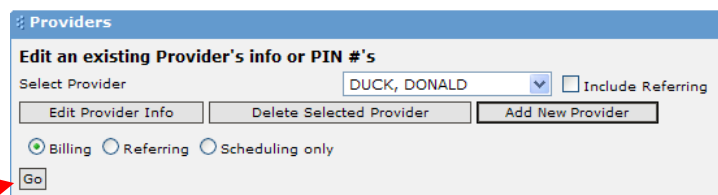
To add a new provider, click on the **Add New Provider** button.



You will then have a choice to add different types of providers:

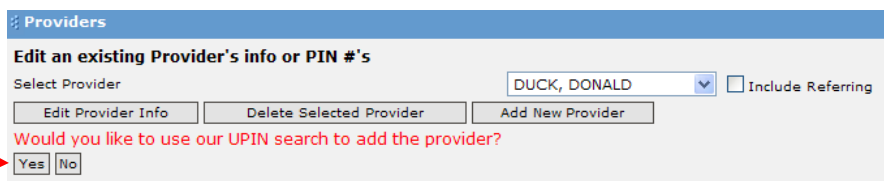
- **Billing provider** – means the provider will be accessed in billing as a rendering provider.
- **Referring provider**
- **Scheduling only** - allows the creation of “dummy provider” records that will be used as resources in scheduling. An example could be a provider extender, room, piece of equipment, etc.

Then click on the **Go** button



To make it easier to add providers, PA has the full UPIN database, which is updated periodically. To search for the provider in the UPIN Database click on the **Yes** button.

If you click **No**, you will be taken to a blank provider form.



UPIN Database Search

To search the UPIN Database, enter at least a **Last Name**. If your search is not successful, note that using the **First Name** and **State** can produce unpredictable results, as the CMS data often links the provider to the first state they registered in. You can also widen your search by setting the type of search to “Contains”, and returning a higher number of records.

When you find the provider you are looking for click on **Add Provider** to add the provider to your practice.

Add a new Provider by using our UPIN Database Search

Last Name Enter at least a Last Name. If your search is not successful, note that using the First Name and State can produce unpredictable results, as the CMS data often links the provider to the first state they registered in. You can also widen your search by setting the type of search to "Contains", and returning a higher # of records

First Name

UPIN

State

Specialty

Search Details

Type of Search

of Records to return

Last Name	First Name	Middle Initial	UPIN	State	Specialty	
ZION	DAVID	E	A88703	CA	Radiology, Diagnostic	Add Provider
ZION	ROBERT	N	T27070	PA	Podiatry	Add Provider
ZION	VICTOR	M	C43456	IL	Ophthalmology	Add Provider

If you cannot find the provider in the UPIN Database, click on the **Add New Provider** button once again, and then choose not to use the UPIN Search

Edit an existing Provider's info or PIN #'s

Select Provider ☐ Include Referring

Provider Information—Summary

- 1) Enter the general provider information.
- 2) Check the box for Signature on File and whether the provider accepts assignment.
- 3) Be sure to select a Tax ID Type and enter the provider Tax ID.
- 4) Select the provider's credential and specialty, and enter the UPIN and state license if required.
- 5) Check the box for "referring" or "scheduling only" if it applies.

General Information

Entity Type

Last Name 1

First Name

Middle Name

Suffix

Address 1

Address 2

City

State

Zip

Email

Signature Status

Signature on File ☐ 2

Phone Details

Home Phone

Work Phone

Mobile Phone

Other Phone

Fax

Pager

Provider Info

Tax ID Type 3

Tax ID

UPIN

Credentials 4

Specialty

Accept Assignment? ☐

Requires Supervision? ☐

Referring? ☐

Scheduling Only? ☒ 5

Provider License

State

License Number

No License numbers found for this provider.



Provider Information—Detail

This is the general information for the provider that will already have some data fields populated if you used the UPIN Search

1) Entity Type—Decide whether this provider is a person, or non-person entity type.

Name—Enter provider last name, first name, middle initial and suffix.

Address—Enter provider street address, city, state and zip.

Email—Enter provider email address.

Enter provider home, work, mobile and other phone numbers, as well as fax and pager numbers on the space provided.

2) Signature on File—Check this box if your claims will go out showing that the provider has signed confirming the service and authorizing payment.

Accept Assignment—Check this box if the provider accepts assignment

3) Tax ID Type—Choose between Employer ID Number, SSN, and Other ID Number

Tax ID— Enter the provider Tax ID in the space provided

4) UPIN— Enter the provider UPIN in the space provided.

Credentials—Select the provider's credentials from the list.

Specialty—Select the provider's specialty from the list.

State—Select the state that the provider was issued his license.

License Number—Enter the provider state license number in the space provided.

5) Requires Supervision—Check this box if the provider requires supervision.

Referring—Check this box if the provider is a referring provider

Scheduling Only—Check this box if the provider is for scheduling use only.

Click on the **Update** button when you finish adding provider information.

Link Provider

This controls the provider names that show up when you select a Facility on Claim General, in PA Billing.

Link Provider To—Select the facilities that you would like the provider to be linked to. Note that the default option is to link the provider to ALL facilities.

Default Location—Select one of the facilities to be the default location for the provider. The default location determines the set of PINs which would go on claims for services in the patient's home.

Click on **Save Provider Info** when done linking provider and adding all other provider information.

Link Provider (This controls the provider names that show when you select a Facility on "Claim General" in PA billing)

Link provider to: --Link to all facilities--

*DUCK, DONALD is currently linked to :

CALIFORNIA TEST	[Default location] Make default
KY TEST FAC (IP)	Make default
MEDICAL TEST FACILITY	Make default
NORCROSS MEDICAL	Make default
NORTH FULTON REGIONAL HOSPITAL (IP)	Make default
NORTHWOODS SURGERY CENTER	Make default
OHIO TEST	Make default
PIEDMONT HOSPITAL (IP)	Make default
PIEDMONT HOSPITAL ICU (IP)	Make default
SPORTS & SPINE ASSOCIATES	Make default
TAMPA GENERAL HOSPITAL (duplicate) (IP)	Make default
WAYNE CO HOSP INC (IP)	Make default

The default location determines the set of PIN#'s which would go on claims for services in the patient's home

Save Provider Info

On Hold for EDI

This is managed by EDI enrollment and EDI setup – and this grid will show you if a provider is on hold for EDI. This will usually

* The provider is ON HOLD for following EDI receivers :	
EDI receivers	
Champus Tricare	



be due to pending enrollments. Contact PA Enrollment if you need any changes made here.

Provider PIN #'s

No PIN's need to be entered for commercial insurances that use the tax ID – see "how PINs are linked to claims, next.

Provider PIN's in PA are all linked to each facility that is set up for billing purposes. This allows the flexibility to accommodate those instances where some payers issue differing PIN#'s for each facility.

The PIN's are then linked to either the insurance type, or to individual insurance plans. Most of the time, it is only necessary to enter PIN's for insurance types.

How PIN's are linked to claims

When a claim is saved and released, the PIN number gets linked to it, as follows:

First PA looks for a PIN number for the individual insurance plan for that claim, if not found, it then looks for a PIN for the insurance type that the plan is mapped to, and if that is not found, it defaults to the tax ID.

Adding a Provider's PIN number (see images below)

- 1) Select a facility from the pull down menu. It may be one facility or all facilities. If the PIN will apply to multiple facilities but not all facilities, they must be added one at a time.
- 2) Select Insurance Type or Insurance Plan by clicking the appropriate radio button.
- 3) Depending upon which selection was made in step #2 only one of the two pull down menus will be active. Make the appropriate selection from the pull down menu.
- 4) Type in the Provider PIN number
- 5) Click Add New.

The screenshot shows a form titled "Add New Provider PIN". At the top, there is a "Save Provider PIN" button and a message "Provider PIN saved successfully". Below this, a message states "No PIN's found for the selected provider". The form contains several fields: "Facility Name" (a dropdown menu with "NORTH OFFICE (IP)" selected), "Insurance Type" (a radio button), "Insurance Plan" (a radio button), "Insurance Type" (a dropdown menu with "Aetna" selected), "Insurance Plan" (a dropdown menu with "CIGNA HMO" selected), "Provider Pin" (a text field with "1234567" entered), and an "Add New" button. Red circles with numbers 1 through 5 are overlaid on the form to indicate the steps: 1 points to the Facility Name dropdown, 2 points to the Insurance Type radio button, 3 points to the Insurance Type dropdown, 4 points to the Provider Pin text field, and 5 points to the Add New button.

The PIN number will be added to the list.

The screenshot shows a table titled "PIN's found for the provider:". The table has columns: "Facility Name", "Ins Plan", "Insurance Type", "Insurance Plan", "Provider Pin", and "Delete". The first row shows "NORTH OFFICE (IP)" for Facility Name, "Ins Plan" for Insurance Type, "N/A" for Insurance Plan, "CIGNA HMO" for Provider Pin, and "1234567" for Delete. Below the table, there is a dropdown menu with "--Add pin for all facilities--" selected, and a radio button for "Insurance Type". Below the radio button, there is a dropdown menu with "Aetna" selected, and a dropdown menu with "AKWESASNE" selected. To the right of these dropdowns is an "Add New" button.

Editing a PIN number

Note that if you need to edit a PIN number for all facilities, there is a shortcut. Do not use the edit mechanism, just go and add the correct PIN as a new PIN for all facilities, and this will overwrite the existing PIN with the new one.



To edit an existing PIN, click on **Edit**, located next to the facility name. Make your changes, and then click on **Update** to save those changes.



Edit	NORTH FULTON REGIONAL HOSPITAL (IP)	Ins Type	Blue Cross		8837234D	Delete
Update Cancel	NORTHWOODS SURGERY CENTER	<input checked="" type="radio"/> Insurance Type <input type="radio"/> Insurance Plan	Blue Cross	AKWESASNE MOHAWK CASINO	8837234D	Delete

Tip: You can sort this view by Facility Name, Insurance Type, Insurance Plan, or Provider PIN. To sort, click on the link for each one of those (highlighted on the picture), and they'll be sorted alphabetically.



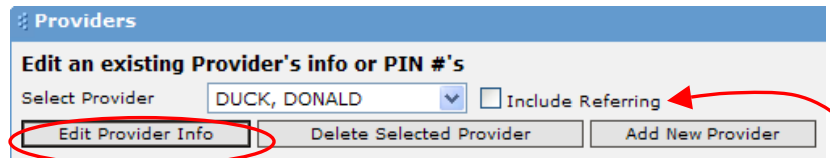
Facility Name	Insurance Type	Insurance Plan	Provider Pin
-------------------------------	--------------------------------	--------------------------------	------------------------------

Step 3—Edit Provider

Click on the **Edit Provider** button. The provider information form will come up.

Make the appropriate changes, and click on the **Update** button.

Tip: If you don't see the provider's name you are looking for, check the box **Include Referring**, which will show all of the providers on the drop down list—including the referring providers of course.



Providers

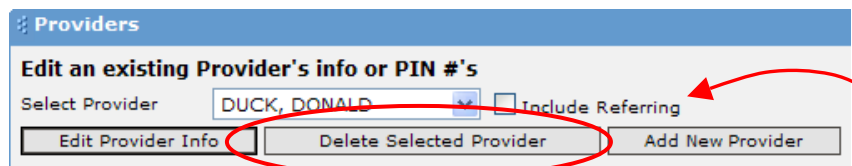
Edit an existing Provider's info or PIN #'s

Select Provider: ☐ Include Referring

[Edit Provider Info](#) [Delete Selected Provider](#) [Add New Provider](#)

Step 4—Delete Provider

To delete a provider, click on the **Delete Provider** button.



Providers

Edit an existing Provider's info or PIN #'s

Select Provider: ☐ Include Referring

[Edit Provider Info](#) [Delete Selected Provider](#) [Add New Provider](#)

Tip: If you don't see the provider's name you are looking for, check the box **Include Referring**, which will show all of the providers on the drop down list—including the referring providers of course.