

# Tax ID Setup

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Version 14.19

## About

As business structures, credentialing processes, and payer mixes vary among pediatric offices, so do needs for which Tax ID number should be sent on claims. The following article outlines set-up steps to ensure that each claim your practice submits contains the correct Tax ID. For each claim, the OP software includes the first Tax ID found while following this order:

1. OP will look first for the Tax ID in the **Insurance Payer Provider Details > Line 25 (Tax ID)** field.
2. OP will look second to the **Locations tab > Tax ID (Corporate)** field.
3. If both of the above fields are blank, OP will look to **Staff/Provider Directory > Provider Info tab > Federal Tax ID** field.

For a visual representation of this order, see the table below:

Does your Tax ID appear in these tables?			Then, for claims, it will pull from...
Insurance Payer Provider Details > Line 25 (Tax ID)	Locations tab > Tax ID (Corporate)	Staff/Provider Directory > Provider Info > Federal Tax ID	
Yes	Yes	Yes	Insurance Payer Provider Details
No	Yes	Yes	Locations tab
No	No	Yes	Staff Provider Directory
Yes	No	Yes	Insurance Payer Provider Details

The table below provides examples of how you can set up OP to populate the correct Tax ID on claims.

If a Practice's Tax ID Varies by	Example Scenario	OP Field to Populate
Location	<ul style="list-style-type: none"> <li>I have multiple Tax IDs which are assigned to different locations.</li> <li>I have a separate Tax ID for my after-hours clinic, autism clinic, or other separate entity. (Use this by creating a new location for the clinic).</li> </ul>	Locations tab > Tax ID (Corporate) field
Payer	<ul style="list-style-type: none"> <li>I have multiple Tax IDs which are assigned to different payers based on how we are credentialed.</li> </ul>	Insurance Payer Provider Details > Line 25 (Tax ID) field
Provider	<ul style="list-style-type: none"> <li>I have one Tax ID that covers my practice and all the providers in it.</li> <li>I have a Tax ID assigned to each of my providers.</li> </ul>	Staff Provider Directory > Provider Info tab > Federal Tax ID



**Note:** If you have any questions regarding the setup of Tax IDs in OP, contact your Implementation Specialist or OP's Support Team.

Version 14.10

## Overview

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Version 14.8

The content in this article only applies to users running OP Version 14.9 or later.

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