

Practices and Locations (Add, Remove, Edit)

Last Modified on 09/15/2022 8:14 am EDT

Version 20.17

Path: Practice Management tab > Practices/Locations

About

In this section, you will learn how to add a Practice or Location to your OP database. The addition of a Practice should only occur when there is a new Practice NPI involved. Locations, however, should be added whenever a practice adds an additional location to their Practice.

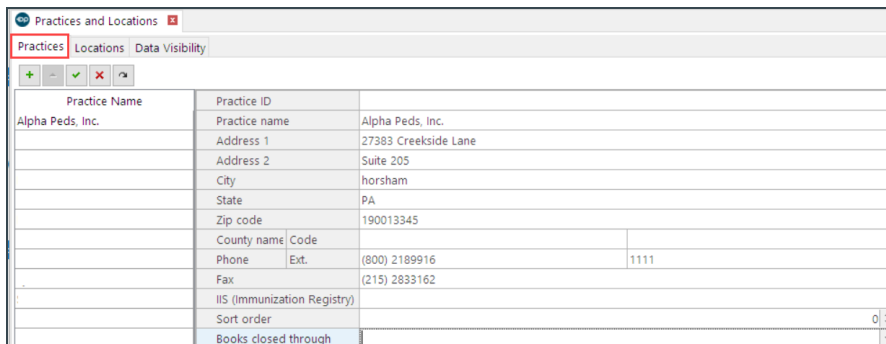
- [Adding a Practice](#)
- [Adding a Location](#)
- [Editing a location](#)
- [Removing a location](#)
- [Set up Data Visibility and Enable Multiple Office Location Feature](#)

Adding a Practice



Note: The addition of a Practice should only occur when a new NPI is involved. If you have questions as to whether or not you should be adding a new Practice to your database, please contact the [Support Team](#).

1. Navigate to the Practices and Locations window following the path above.
2. If not selected, click the **Practices** tab.



Practice Name		Practice ID	
Alpha Peds, Inc.		Practice name	Alpha Peds, Inc.
		Address 1	27383 Creekside Lane
		Address 2	Suite 205
		City	horsham
		State	PA
		Zip code	190013345
		County name	Code
		Phone	Ext.
		(800) 2189916	1111
		Fax	(215) 2833162
		IIS (Immunization Registry)	
		Sort order	0
		Books closed through	

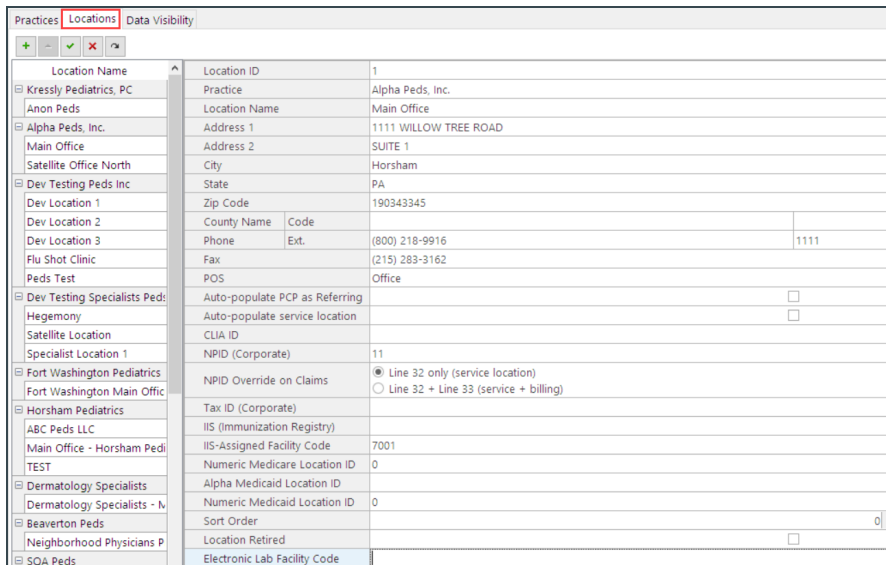
3. Click the **Add** button.
4. Enter information in the appropriate fields keeping these important points in mind:
 - Each Practice in your database must have its own sort order #
 - The Zip Code must be nine digits, without a dash
5. Enter a **Sort order** to indicate where the Practice will be listed in any applicable drop-down lists.
6. Click the **Save** button to save the Practice.

Adding a Location

Follow the steps below to add a new Location to your OP database. The addition of a Location in the Practices and Locations

table sets the groundwork for the additional setup that must be configured in order for that new Location to be fully functional in OP. For the complete list of items to consider when adding a new Location to your system, click [here](#).

1. Click the **Locations** tab.



2. Click the **Add** button.
3. Enter all Location information in the appropriate fields, keeping these important points in mind:
 - Each Location must have a selection made in the Practice drop-down
 - The Zip Code must be entered as 9 digits, no dash
 - Payer requirements:
 - If all claims for the Location require patients' PCPs to be populated as the Referring Provider (Box 17), select the checkbox to auto-populate this.
 - If all claims for the Location require the Service Location (Box 32) to be populated on claims, select the checkbox to auto-populate this.
 - CLIA ID is used to transmit the Location's CLIA ID for billing purposes.
 - The Sort order is the order in which this Location is listed in Location drop-down menus.

Warning: OP is configured to look to this **NPID (Corporate)** field first to determine the Group NPI to bill on claims (when the Billing Loop includes the Practice NPI). Once the Group NPI is entered here, a selection of the appropriate claim box is required. Choose one of the following:

- Line 32 only (service location) to populate the Group NPI on line 32 of claims.
- Line 32 + 33 (service and billing) to populate the Group NPI on lines 32 and 33 of claims.

If this field is left blank, OP will defer to the **Practice NPI** field in the Practice Info tab of the Staff/Provider Directory.

4. Click the **Save** button.

Note: Once a new Location has been added, any patients registered while a user is signed into a particular Location will automatically have that Location listed as their Medical Home.

Editing a location

1. Click the **Locations** tab.
2. Select the Practice Location you would like to edit. The location information will appear on the right side of the window.
3. Click the **Edit** button.

- Edit the information as needed.
- Click the **Save** button to save your Location edit.



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- Line 32 + 33 (service and billing) to populate the Group NPI on lines 32 and 33 of claims.

If this field is left blank, OP will defer to the Practice NPI field in the Practice Info tab of the Staff/Provider Directory.

Removing a location

- Under the **Locations** tab, select the practice location you would like to remove. The location information will appear on the right side of the window.
- Click the **Location Retired** checkbox, and click the **Save** button to save your changes.
- The retired location will no longer appear in any location drop-down list as an option.



Warning: The Primary location (Location 1) cannot be retired. If you attempt to archive the Primary location, a warning will be displayed.

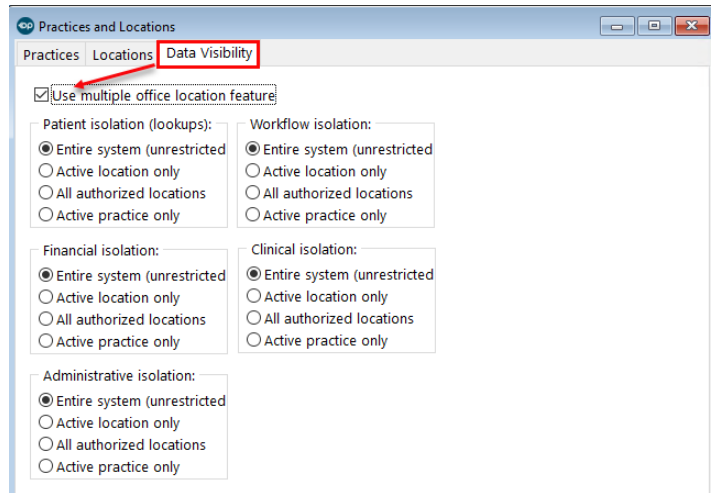
Set up Data Visibility and Enable Multiple Office Location Feature

The Data Visibility tab allows you to set the data visibility permissions for each data domain (Patient, Financial, Administrative, Workflow, and Clinical) and to assign one permission level to each data domain. From the Data Visibility tab, you can also activate the 'multiple office location feature'. This feature allows practices with multiple locations the ability to navigate to another location's schedule (as long as Entire system permission has been selected) and provides a drop-down in the menu bar that will show and allow change to the logged in user's location.

- To set the Data Visibility permission levels for the selected Practice and Location, click one of the following radio buttons for each domain. Please note, **Entire system (unrestricted)** is the default setting for each domain.

Permission	Definition
Entire System (unrestricted)	Can view all data for all locations.
Active location only	Data visibility pertains to the location the user is currently logged into.
All authorized locations	Data visibility pertains only to the location the user is authorized to work.
Active practice only	Data visibility pertains to any location where the user is currently logged in.

- Under the **Data Visibility** tab, select the **use multiple office location feature** checkbox if your practice has more than one location.



3. Log out and close OP.
4. Relaunch and log back in.
5. The Multiple Office Location Feature will now be activated. A drop down box in the menu bar will show the logged-in user's location.

Version 20.16

Path: Practice Management tab > Practices/Locations

Overview

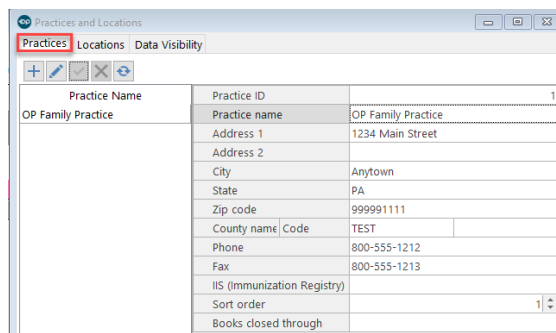
In this section, you will learn how to add a Practice or Location to your OP database. The addition of a Practice should only occur when there is a new Practice NPI involved. Locations, however, should be added whenever a practice adds an additional location to their practice.

Adding a Practice





Note: The addition of a practice should only occur when a new NPI is involved. If you have questions as to whether or not you should be adding a new Practice to your database, please contact our [Support](#) team.

1. Click the **Practices** tab, if not selected.



Practice Name	Practice ID	
OP Family Practice	1	OP Family Practice
		Address 1
		Address 2
		City
		State
		Zip code
		County name
		Code
		Phone
		Fax
		IIS (Immunization Registry)
		Sort order
		Books closed through





2. Click the **Add** button .
3. Enter all requested location information in the appropriate fields keeping these important points in mind:
 - Each Practice in your database must have its own sort order #.
 - Zip code must be nine digits, without a dash.

4. Enter a **Sort order** to indicate where the location will appear in any applicable drop-down lists.
5. Click the **Save** button  to save your edit.

Adding a Location

Follow the steps below to add a new location to your OP database. The addition of a location in the Practices and Locations table sets the groundwork for additional setup that must be configured in order for that new location to be fully functional in OP. For the complete list of items to consider when adding a new location to your system, click [here](#).

1. Click the **Locations** tab.

Practices Locations Data Visibility		
   		
Location Name	Location ID	18
Neighborhood Physicians Prac	Practice	Neighborhood Physicians Practice
Neighborhood II	Location Name	Neighborhood II
Neighborhood Physicians Prac	Address 1	123 Main Street
	Address 2	
	City	Fort Washington
	State	Pa
	Zip Code	19034
	County Name	Code
	Phone	
	Fax	
	POS	
	Auto-populate PCP as Referring	
	Auto-populate service location	
	CLIA ID	
	NPID (Corporate)	
	NPID Override on Claims	<input checked="" type="radio"/> Line 32 only (service location) <input type="radio"/> Line 32 + Line 33 (service + billing)
	Tax ID (Corporate)	
	IIS (Immunization Registry)	
	IIS-Assigned Facility Code	
	Numeric Medicare Location ID	
	Alpha Medicaid Location ID	
	Numeric Medicaid Location ID	
	Sort Order	
	Location Retired	
	Electronic Lab Facility Code	

2. Click the **Add** button.
3. Enter all requested location information in the appropriate fields, keeping these important points in mind:
 - Each location must have a selection made in the practice drop-down.
 - Zip code must be entered as 9 digits, no dash.
 - Payer requirements:
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4. Click the **Save** button.



Note: Once a new location has been added, any patients registered while a user is signed into a particular location will automatically have that location listed as their Medical Home.

Editing a location

1. Click the **Locations** tab.
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Removing a location

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2. Click the **Location Retired** checkbox, and click the **Save** button to save your changes.
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Set up Data Visibility and Enable Multiple Office Location Feature

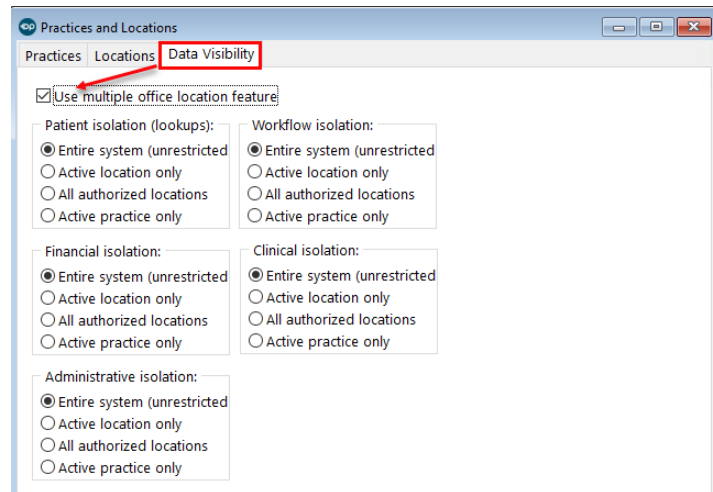
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1. To set the Data Visibility permission levels for the selected Practice and Location, click one of the following radio buttons for each domain. Please note, **Entire system (unrestricted)** is the default setting for each domain.

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