

Add an Address Book Entry

Last Modified on 01/18/2023 10:05 pm EST

Version 21.0

Path: Clinical or Practice Management tab > Address Book button

About

Entries in the Address Book can be easily accessed when adding a patient's PCP, composing letters, issuing referrals, adding a Referring Provider to a claim, and assigning staff as Care Coordinators. If you interface with CHADIS surveys, refer to **CHADIS** documentation for setup requirements in the Address Book. The instructions below walk you through adding an entry for a Provider or Contact that is not part of the Practice.



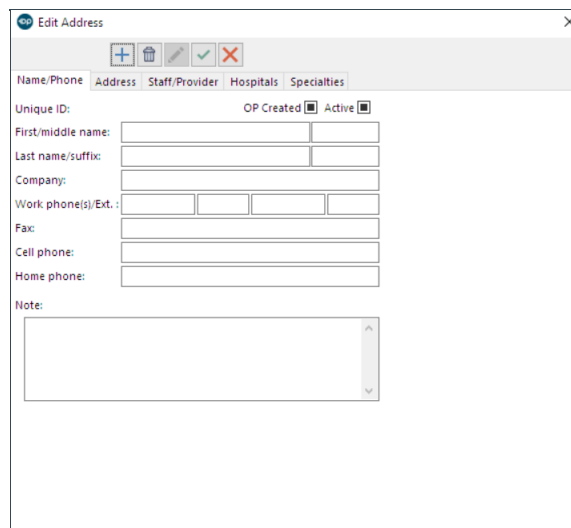
Note: An Address Book entry is automatically created for OP users when they are added to the Staff/Provider Directory. In certain cases, it may be necessary to review those entries and add additional information.

Add Name/Phone and Address Information



Tip: To prevent duplicate Address Book entries, it is Best Practice to search the Address Book before adding a new entry.

1. Navigate to the Address Book by following the path above.
2. Click **New**. The **Edit Address** window opens to the **Name/Phone** tab.

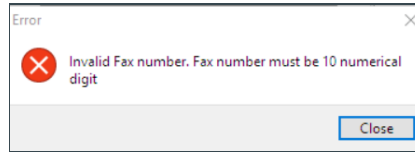


The screenshot shows the 'Edit Address' window with the 'Name/Phone' tab selected. The window contains the following fields and controls:

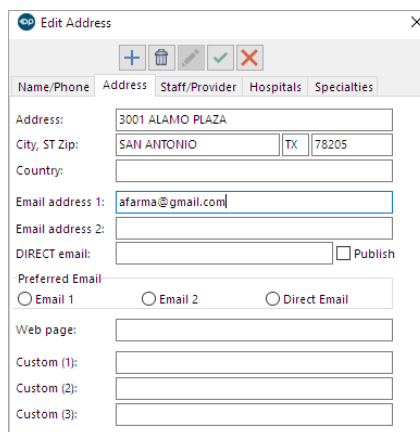
- Unique ID: OP Created Active
- First/middle name:
- Last name/suffix:
- Company:
- Work phone(s)/Ext.:
- Fax:
- Cell phone:
- Home phone:
- Note:

3. Enter the following information:
 - First/middle name
 - Last name/suffix
 - Company
 - Work phone #1 / Ext #1 / Work phone #2 / Ext #2
 - Fax
 - Cell phone
 - Home phone
 - Note

Note: All phone number fields (work, fax, cell, and home) are validated to make sure they contains 10 digits (or 11, only in the case of the fax number, and only if the number includes a 1- before the area code) upon saving a record. If an error is received, confirm there are 10 numerical digits entered.



4. Select the **Active** checkbox to indicate this is an active Contact.
5. Click the **Address** tab.
6. Enter the following information:
 - Address
 - City, State, Zip
 - Country
 - Email address 1 (proper email formatting required)
 - Email address 2 (proper email formatting required)
 - DIRECT email (proper email formatting required)
 - Preferred email: Allows you to select your preferred email/direct email.
 - Web page
 - Custom 1-3 (other types of addresses that may pertain to a contact)



Add Staff/Provider Information

The **Staff/Provider** tab houses the following information:

- The ability to include the individual in the Staff/PCP list
- The Staff/Provider's initials
- The Staff/Provider's NPI
- Insurance affiliations

A Provider's NPI # should be added to this tab if a Referring Provider's information is required on claims by any of your insurance payers. To add Staff/Provider information:

1. Click the **Staff/Provider** tab.
2. Enter the above information as well as the following:

- Initials
- NPI number
- Insurance Carrier identifier(s) for the contact.

Add Hospital Affiliation

1. Click the **Hospitals** tab.
2. Click **Click here to add a new hospital affiliation**.
3. Using the drop-down, select the hospital to which the contact is affiliated.
4. Click the **Save** button.
5. Repeat the steps if affiliating a physician to more than one hospital.



Note: If the affiliated hospital is not listed in the drop-down list, it means that the hospital has not been added to the Laboratories and Hospitals table. Click the **Add/Modify Hospital List** button to be routed to that table. For more information on adding to that table, click [here](#).

Add Specialties

A Specialty categorizes the Contact and makes it easier to search. Specialties are also used for PCMH. For example, Care Coordinator, Urgent Care, and Emergency Department are all PCMH measures that are calculated based upon the Address Book categorization. Refer to the PCMH Roadmap for specific information.

1. Click the **Specialties** tab.
2. Click the grid indication **Click here to add a new specialty affiliation** to display the drop-down field.
3. Using the drop-down, select a specialty that pertains to the Contact.
4. Click the **Save** button.
5. Repeat the steps if the physician is associated with additional specialties.



Note: If an appropriate Specialty is not displayed in the menu, click the Add/Modify Specialty List button. The Address Book Specialty Descriptors window opens where you can add a specialty. For more information on adding to this table, click [here](#).

When all known information has been entered, click the **Save** button located in the toolbar at the top of the Address Book to save the contact.

Version 20.18

Overview

This page will instruct you on how to add entries into the Address Book. Entries in the Address Book can be easily accessed when adding a patient's PCP, composing letters, issuing referrals, adding a referring provider to a claim, and assigning staff as Care Coordinators. If you interface with CHADIS surveys, refer to **CHADIS** documentation for setup requirements in the Address Book.



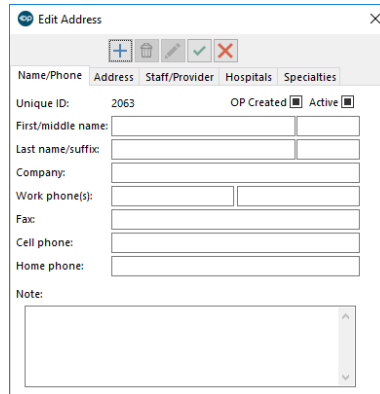
Note: An Address Book entry will automatically be created when users are added to the Staff/Provider Directory. In certain cases, it may be necessary to review those entries and add additional information. The instructions below will walk a user through adding an entry for a Provider or Contact that is not part of the practice.

Add Name/Phone and Address Information



Tip: To prevent duplicate Address Book entries, it is Best Practice to search the Address Book before adding a new entry.

1. Navigate to the Address Book: **Clinical** or **Practice Management** tab > **Address Book** button.
2. Click **New**. The **Edit Address** window opens to the **Name/Phone** tab.



3. Enter the following information:
 - First/middle name
 - Last name/suffix
 - Company
 - Work Phone(s)
 - Fax
 - Cell phone
 - Home phone
 - Note
4. Select the **Active** checkbox to indicate this is an active contact.
5. Click the **Address** tab.
6. Enter the following information:
 - Address
 - City, State, Zip
 - Country
 - Email address 1
 - Email address 2
 - DIRECT email
 - Web page
 - Custom 1-3 (other types of addresses that may pertain to a contact)

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1. Click the **Specialties** tab.
2. Click the grid indication '**Click here to add a new specialty affiliation**' to display the drop-down field.
3. Using the drop-down, select a specialty that pertains to the contact.



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When all known information has been entered, click the **Save** button  located in the tool bar at the top of the Address Book to save the contact.