

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Taxonomy Fields

Last Modified on 11/19/2019 12:49 pm EST

Version 14.19

To ensure you are meeting the guidelines of your Insurance carriers, you will want to make sure that you are including your provider's taxonomy code where applicable on claims. A missing taxonomy code (where required) may cause claim denials, so it is important to understand how OP 14 generates this information. This article explains how to enter this information into OP 14 in order to make sure the taxonomy code exists on claims in the appropriate location as dictated by your Insurance carrier.

## If Taxonomy is Required in Box 24J

If the insurance requires that the taxonomy code appear in box 24J of the claim, the following two windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Provider Info tab**

The Provider Info tab of the Staff/Provider Directory houses each Billing Provider's taxonomy code. You will want to make sure that this is populated for each provider.

### Staff Directory

+
-
✎
✓
✗

Basic Info	Data Visibility	Provider Info	Practice Info	IIS	Lab Links	e-Prescribing
<p>Signature name: <input style="width: 100%;" type="text" value="Sloan J. Knox, MD"/>  <small style="color: red;">First 21 characters of signature name appear on line 31 of the claim form. A comma MUST occur after last name.</small></p> <p>License info: <input style="width: 100%;" type="text" value="Pennsylvania"/></p> <p>License #: <input style="width: 100%;" type="text"/></p> <p>Federal DEA#: <input style="width: 100%;" type="text"/> State DEA#: <input style="width: 100%;" type="text"/></p> <p>Federal Tax ID: <input style="width: 100%;" type="text" value="1234567890"/> or SSN: <input style="width: 100%;" type="text"/></p> <p>Provider NPID: <input style="width: 100%;" type="text" value="9876543210"/> (line 24J)</p> <p>Provider UPIN: <input style="width: 100%;" type="text"/></p> <p style="border: 2px solid red; padding: 2px;">Taxonomy code: <input style="width: 100%;" type="text" value="208000000X"/> (HPTC - line 31)*</p> <p>Merchant ID: <input style="width: 100%;" type="text"/></p> <p>NADEAN #: <input style="width: 100%;" type="text"/></p>						

## Insurance Payer Setup

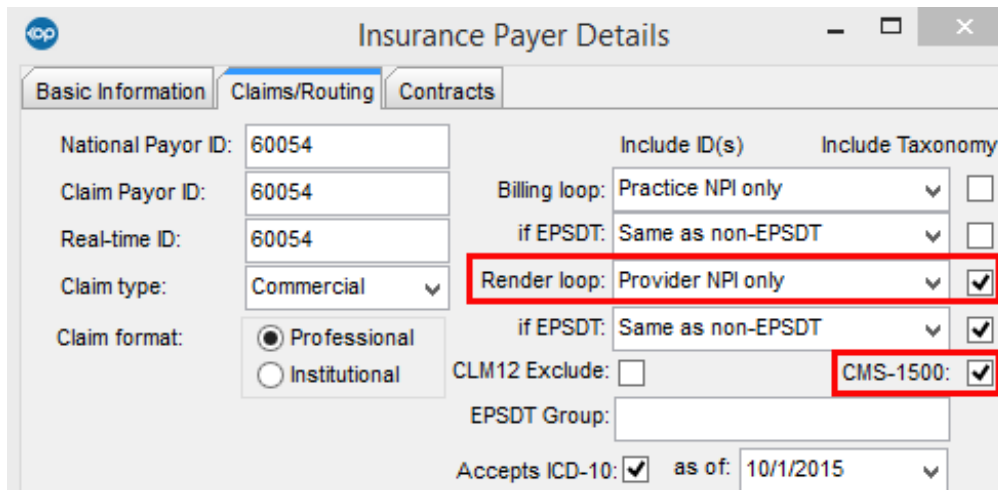
**Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details**

After verifying the taxonomy code exists in the Provider Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Rendering Loop dropdown.
- Do not select Suppress (don't include) from the Rendering Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Select the CMS-1500 checkbox located below Include Taxonomy.



**Note:** If you are using EPSDT indicators, please verify with the insurance company that they want the same information on EPSDT and non-EPSDT claims. Then, select the EPSDT checkboxes accordingly.



Basic Information		Claims/Routing	Contracts
National Payor ID:	60054	Include ID(s)	Include Taxonomy
Claim Payor ID:	60054	Billing loop:	Practice NPI only <input type="checkbox"/>
Real-time ID:	60054	if EPSDT:	Same as non-EPSDT <input type="checkbox"/>
Claim type:	Commercial	Render loop:	Provider NPI only <input checked="" type="checkbox"/>
Claim format:	<input checked="" type="radio"/> Professional <input type="radio"/> Institutional	if EPSDT:	Same as non-EPSDT <input checked="" type="checkbox"/>
		CLM12 Exclude:	<input type="checkbox"/> CMS-1500: <input checked="" type="checkbox"/>
		EPSDT Group:	
		Accepts ICD-10:	<input checked="" type="checkbox"/> as of: 10/1/2015

## If Taxonomy is Required in Box 33b

If the insurance requires that the taxonomy code appear in box 33b of the claim, the following two Staff/Provider Directory and Insurance Payer Setup windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Practice Info tab**

The Practice Info tab of the Staff/Provider Directory houses the practice's taxonomy code. You will want to make sure that this is populated for each provider.

### Staff Directory

+
-
✎
✓
✗

Basic Info
Data Visibility
Provider Info
Practice Info
IIS
Lab Links
e-Prescribing

📄 Copy Primary Provider

Report headings:

Alt. practice name:

Full address:

Phone:  Fax:

Pager:

#### Billing/Pay-To Information

Billing name:

Billing address:

Billing city:  State:  ZIP:

Pay-to address:

Pay-to city:  State:  ZIP:

Taxonomy:

Practice NPI:

Line 17: lookup referral letter on Charges form (specialists only)

## Insurance Payer Setup

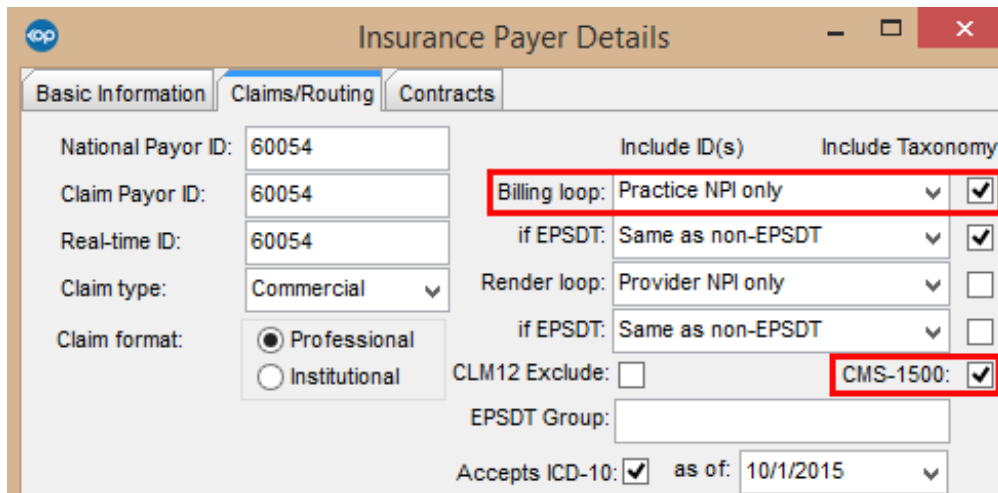
### Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details

After verifying the taxonomy code exists in the Practice Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Billing Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Mark the CMS-1500 checkbox located below Include Taxonomy.



**Note:** If you are using EPSDT indicators, please verify with the insurance company that they want the same information on EPSDT and non-EPSDT claims. Then, select the EPSDT checkboxes accordingly.



Basic Information		Claims/Routing		Contracts	
National Payor ID:	60054	Include ID(s)	Include Taxonomy		
Claim Payor ID:	60054	Billing loop:	Practice NPI only	<input checked="" type="checkbox"/>	
Real-time ID:	60054	if EPSDT:	Same as non-EPSDT	<input checked="" type="checkbox"/>	
Claim type:	Commercial	Render loop:	Provider NPI only	<input type="checkbox"/>	
Claim format:	<input checked="" type="radio"/> Professional <input type="radio"/> Institutional	if EPSDT:	Same as non-EPSDT	<input type="checkbox"/>	
		CLM12 Exclude:	<input type="checkbox"/>	CMS-1500:	<input checked="" type="checkbox"/>
		EPSDT Group:			
		Accepts ICD-10:	<input checked="" type="checkbox"/>	as of:	10/1/2015

## Other Taxonomy Fields

As you work through your payer setup, you will notice other taxonomy fields in OP 14.

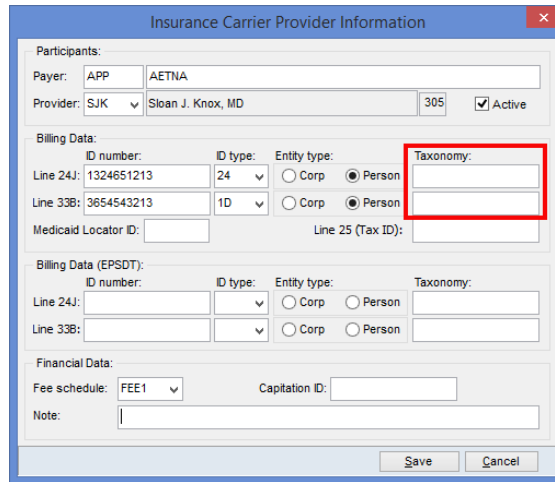
## Insurance Payers List

**Path: Utilities Menu > Manage Practice > Insurance Payers**

After navigating to the Insurance Payer table, you will need to ensure that your credentialed providers are associated to their respective billable insurances. For the steps on how to do this, visit [Connect Providers to Insurance Payers](#). Part of that credentialing may dictate that other ID Types and Numbers exist on a provider's claims. Additionally, there are Taxonomy fields located in this window. These fields are optional and will default to the provider's taxonomy from the Provider tab of the Staff/Provider Directory if kept blank.



**Warning:** Any information entered into the Insurance Carrier Provider Information window will override the other windows as described in the instructions above to populate taxonomy in boxes 24J and 33b.



Version 14.8

To ensure you are meeting the guidelines of your Insurance carriers, you will want to make sure that you are including your provider's taxonomy code where applicable on claims. A missing taxonomy code (where required) may cause claim denials, so it is important to understand how OP 14 generates this information. This article explains how to enter this information into OP 14 in order to make sure the taxonomy code exists on claims in the appropriate location as dictated by your Insurance carrier.

## If Taxonomy is Required in Box 24J

If the insurance requires that the taxonomy code appear in box 24J of the claim, the following two windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Provider Info tab**

The Provider Info tab of the Staff/Provider Directory houses each Billing Provider's taxonomy code. You will want to make sure that this is populated for each provider.

### Staff Directory

+
-
✎
✓
✗

Basic Info	Data Visibility	Provider Info	Practice Info	IIS	Lab Links	e-Prescribing
Signature name: <input style="width: 90%;" type="text" value="Sloan J. Knox, MD"/> <span style="font-size: small; color: red;">First 21 characters of signature name appear on line 31 of the claim form. A comma MUST occur after last name.</span>						
License info: <input style="width: 90%;" type="text" value="Pennsylvania"/>						
License #: <input style="width: 90%;" type="text"/>						
Federal DEA#: <input style="width: 45%;" type="text"/> State DEA#: <input style="width: 45%;" type="text"/>						
Federal Tax ID: <input style="width: 45%;" type="text" value="1234567890"/> or SSN: <input style="width: 45%;" type="text"/>						
Provider NPID: <input style="width: 45%;" type="text" value="9876543210"/> (line 24J)						
Provider UPIN: <input style="width: 90%;" type="text"/>						
<span style="border: 2px solid red; padding: 2px;">Taxonomy code: <input style="width: 45%;" type="text" value="208000000X"/></span> (HPTC - line 31)*						
Merchant ID: <input style="width: 90%;" type="text"/>						
NADEAN #: <input style="width: 90%;" type="text"/>						

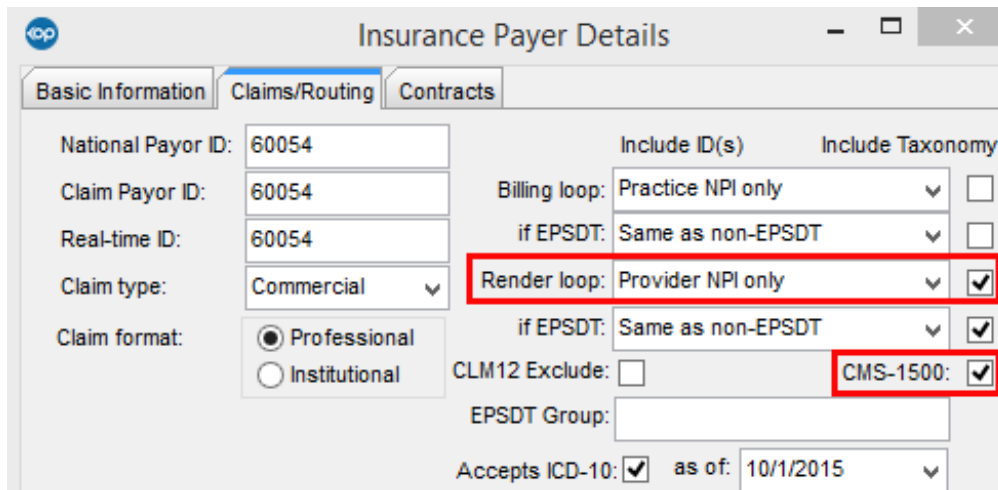
## Insurance Payer Setup

**Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details**

After verifying the taxonomy code exists in the Provider Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Rendering Loop dropdown.
- Do not select Suppress (don't include) from the Rendering Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Select the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance company that they want the same information on EPSDT and non-EPSDT claims. Then, mark the EPSDT checkboxes accordingly.



Basic Information		Claims/Routing		Contracts	
National Payor ID:	60054	Include ID(s)	Include Taxonomy		
Claim Payor ID:	60054	Billing loop:	Practice NPI only	<input type="checkbox"/>	
Real-time ID:	60054	if EPSDT:	Same as non-EPSDT	<input type="checkbox"/>	
Claim type:	Commercial	Render loop:	Provider NPI only	<input checked="" type="checkbox"/>	
Claim format:	<input checked="" type="radio"/> Professional <input type="radio"/> Institutional	if EPSDT:	Same as non-EPSDT	<input checked="" type="checkbox"/>	
		CLM12 Exclude:	<input type="checkbox"/>	CMS-1500:	<input checked="" type="checkbox"/>
		EPSDT Group:			
		Accepts ICD-10:	<input checked="" type="checkbox"/>	as of:	10/1/2015

## If Taxonomy is Required in Box 33b

If the insurance requires that the taxonomy code appear in box 33b of the claim, the following two Staff/Provider Directory and Insurance Payer Setup windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Practice Info tab**

The Practice Info tab of the Staff/Provider Directory houses the practice's taxonomy code. You will want to make sure that this is populated for each provider.



### Staff Directory

+
-
✎
✓
✗

Basic Info
Data Visibility
Provider Info
Practice Info
IIS
Lab Links
e-Prescribing

📄 Copy Primary Provider

Report headings:

Alt. practice name:

Full address:

Phone:  Fax:

Pager:

**Billing/Pay-To Information**

Billing name:

Billing address:

Billing city:  State:  ZIP:

Pay-to address:

Pay-to city:  State:  ZIP:

Taxonomy:

Practice NPI:

Line 17: lookup referral letter on Charges form (specialists only)

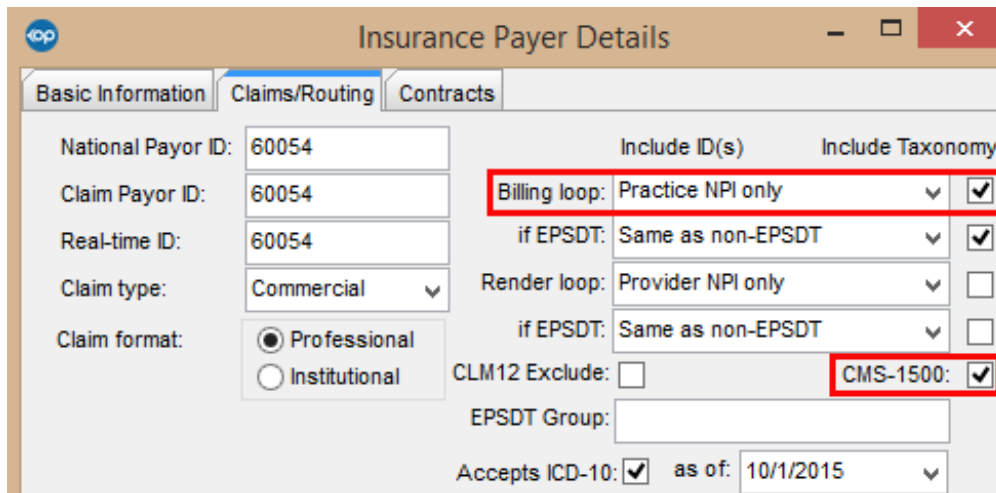
## Insurance Payer Setup

### Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details

After verifying the taxonomy code exists in the Practice Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Billing Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Mark the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance that they want the same information on EPSDT and non-EPSDT claims and mark the EPSDT checkboxes accordingly.



## Other Taxonomy Fields

As you work through your payer setup, you will notice other taxonomy fields in OP 14.

## Insurance Payers List

**Path: Utilities Menu > Manage Practice > Insurance Payers**

After navigating to the Insurance Payer table, you will need to ensure that your credentialed providers are associated to their respective billable insurances. For the steps on how to do this, visit [Connect Providers to Insurance Payers](#). Part of that credentialing may dictate that other ID Types and Numbers exist on a provider's claims. Additionally, there are Taxonomy fields located in this window. These fields are optional and will default to the provider's taxonomy from the Provider tab of the Staff/Provider Directory if kept blank.

**Warning:** Any information entered into the Insurance Carrier Provider Information window will override the other windows as described in the instructions above to populate taxonomy in boxes 24J and 33b.

✕
Insurance Carrier Provider Information

**Participants:**  
 Payer:    
 Provider:     Active

**Billing Data:**  

	ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input checked="" type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

 Medicaid Locator ID:

**Billing Data (EPSDT):**  

	ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

**Financial Data:**  
 Fee schedule:    
 Note:

Version 14.10

To ensure you are meeting the guidelines of your Insurance carriers, you will want to make sure that you are including your provider's taxonomy code where applicable on claims. A missing taxonomy code (where required) may cause claim denials, so it is important to understand how OP 14 generates this information. This article explains how to enter this information into OP 14 in order to make sure the taxonomy code exists on claims in the appropriate location as dictated by your Insurance carrier.

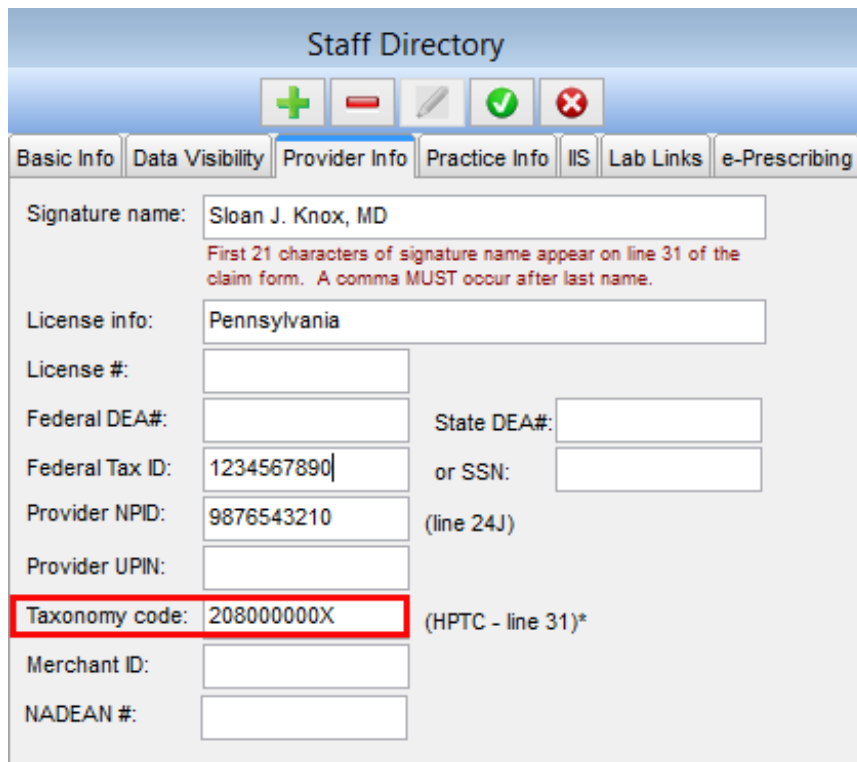
## If Taxonomy is Required in Box 24J

If the insurance requires that the taxonomy code appear in box 24J of the claim, the following two windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Provider Info tab**

The Provider Info tab of the Staff/Provider Directory houses each Billing Provider's taxonomy code. You will want to make sure that this is populated for each provider.



Staff Directory

Basic Info | Data Visibility | **Provider Info** | Practice Info | IIS | Lab Links | e-Prescribing

Signature name: Sloan J. Knox, MD  
First 21 characters of signature name appear on line 31 of the claim form. A comma MUST occur after last name.

License info: Pennsylvania

License #:

Federal DEA#:  State DEA#:

Federal Tax ID: 1234567890 or SSN:

Provider NPID: 9876543210 (line 24J)

Provider UPIN:

**Taxonomy code: 208000000X (HPTC - line 31)\***

Merchant ID:

NADEAN #:

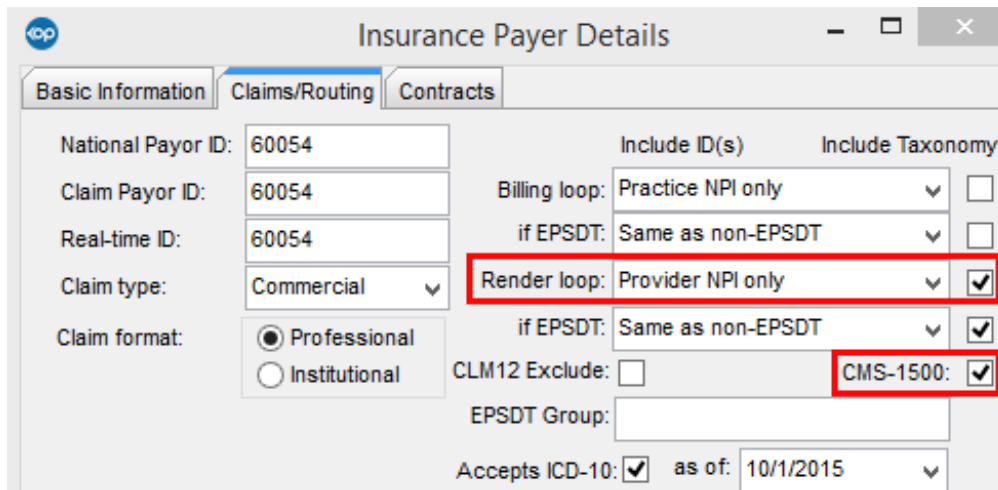
## Insurance Payer Setup

**Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details**

After verifying the taxonomy code exists in the Provider Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Rendering Loop dropdown.
- Do not select Suppress (don't include) from the Rendering Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Select the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance company that they want the same information on EPSDT and non-EPSDT claims. Then, mark the EPSDT checkboxes accordingly.



Basic Information		Claims/Routing		Contracts	
National Payor ID:	60054	Include ID(s)	Include Taxonomy		
Claim Payor ID:	60054	Billing loop:	Practice NPI only	<input type="checkbox"/>	
Real-time ID:	60054	if EPSDT:	Same as non-EPSDT	<input type="checkbox"/>	
Claim type:	Commercial	Render loop:	Provider NPI only	<input checked="" type="checkbox"/>	
Claim format:	<input checked="" type="radio"/> Professional <input type="radio"/> Institutional	if EPSDT:	Same as non-EPSDT	<input checked="" type="checkbox"/>	
		CLM12 Exclude:	<input type="checkbox"/>	CMS-1500:	<input checked="" type="checkbox"/>
		EPSDT Group:			
		Accepts ICD-10:	<input checked="" type="checkbox"/>	as of:	10/1/2015

## If Taxonomy is Required in Box 33b

If the insurance requires that the taxonomy code appear in box 33b of the claim, the following two Staff/Provider Directory and Insurance Payer Setup windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Practice Info tab**

The Practice Info tab of the Staff/Provider Directory houses the practice's taxonomy code. You will want to make sure that this is populated for each provider.

### Staff Directory

+
-
✎
✓
✗

Basic Info
Data Visibility
Provider Info
Practice Info
IIS
Lab Links
e-Prescribing

📄 Copy Primary Provider

Report headings:

Alt. practice name:

Full address:

Phone:  Fax:

Pager:

**Billing/Pay-To Information**

Billing name:

Billing address:

Billing city:  State:  ZIP:

Pay-to address:

Pay-to city:  State:  ZIP:

**Taxonomy:**

Practice NPI:

Line 17: lookup referral letter on Charges form (specialists only)

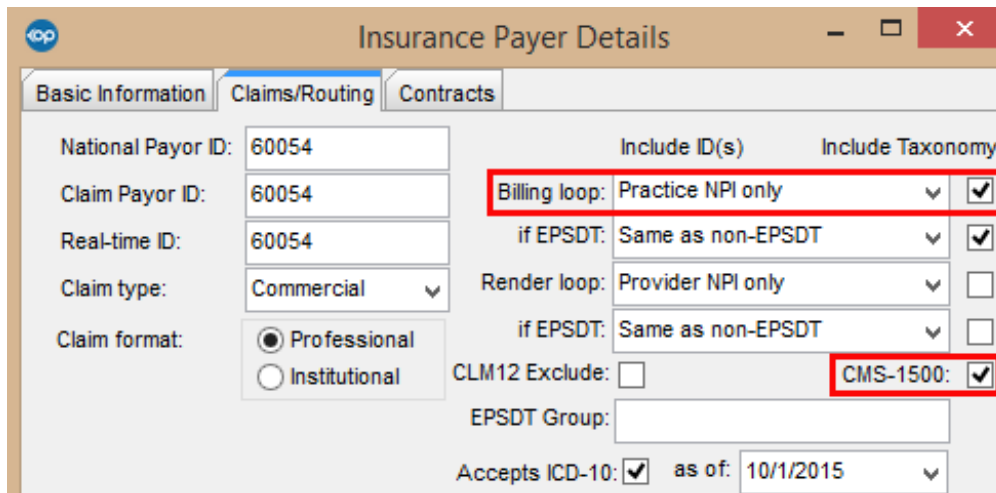
## Insurance Payer Setup

### Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details

After verifying the taxonomy code exists in the Practice Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Billing Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Mark the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance that they want the same information on EPSDT and non-EPSDT claims and mark the EPSDT checkboxes accordingly.



## Other Taxonomy Fields

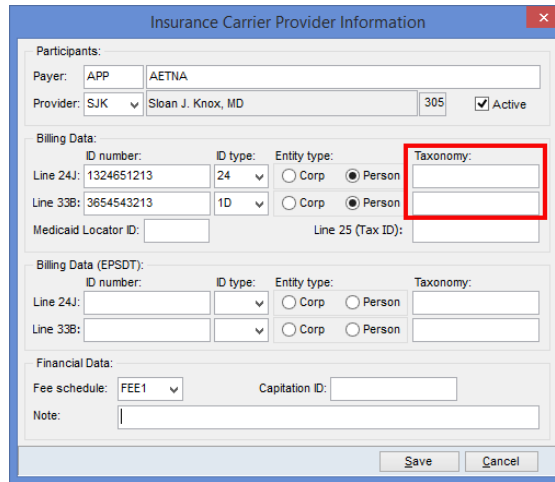
As you work through your payer setup, you will notice other taxonomy fields in OP 14.

## Insurance Payers List

**Path: Utilities Menu > Manage Practice > Insurance Payers**

After navigating to the Insurance Payer table, you will need to ensure that your credentialed providers are associated to their respective billable insurances. For the steps on how to do this, visit [Connect Providers to Insurance Payers](#). Part of that credentialing may dictate that other ID Types and Numbers exist on a provider's claims. Additionally, there are Taxonomy fields located in this window. These fields are optional and will default to the provider's taxonomy from the Provider tab of the Staff/Provider Directory if kept blank.

**Warning:** Any information entered into the Insurance Carrier Provider Information window will override the other windows as described in the instructions above to populate taxonomy in boxes 24J and 33b.



Version 14.8

To ensure you are meeting the guidelines of your Insurance carriers, you will want to make sure that you are including your provider's taxonomy code where applicable on claims. A missing taxonomy code (where required) may cause claim denials, so it is important to understand how OP 14 generates this information. This article explains how to enter this information into OP 14 in order to make sure the taxonomy code exists on claims in the appropriate location as dictated by your Insurance carrier.

## If Taxonomy is Required in Box 24J

If the insurance requires that the taxonomy code appear in box 24J of the claim, the following two windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Provider Info tab**

The Provider Info tab of the Staff/Provider Directory houses each Billing Provider's taxonomy code. You will want to make sure that this is populated for each provider.



**Staff Directory**

+
-
✎
✓
✗

Basic Info	Data Visibility	Provider Info	Practice Info	IIS	Lab Links	e-Prescribing
Signature name:	<input style="width: 100%;" type="text" value="Sloan J. Knox, MD"/> <small style="color: red;">First 21 characters of signature name appear on line 31 of the claim form. A comma MUST occur after last name.</small>					
License info:	<input style="width: 100%;" type="text" value="Pennsylvania"/>					
License #:	<input style="width: 100%;" type="text"/>					
Federal DEA#:	<input style="width: 100%;" type="text"/>	State DEA#:	<input style="width: 100%;" type="text"/>			
Federal Tax ID:	<input style="width: 100%;" type="text" value="1234567890"/>	or SSN:	<input style="width: 100%;" type="text"/>			
Provider NPID:	<input style="width: 100%;" type="text" value="9876543210"/>	(line 24J)				
Provider UPIN:	<input style="width: 100%;" type="text"/>					
Taxonomy code:	<input style="width: 100%;" type="text" value="208000000X"/>	(HPTC - line 31)*				
Merchant ID:	<input style="width: 100%;" type="text"/>					
NADEAN #:	<input style="width: 100%;" type="text"/>					

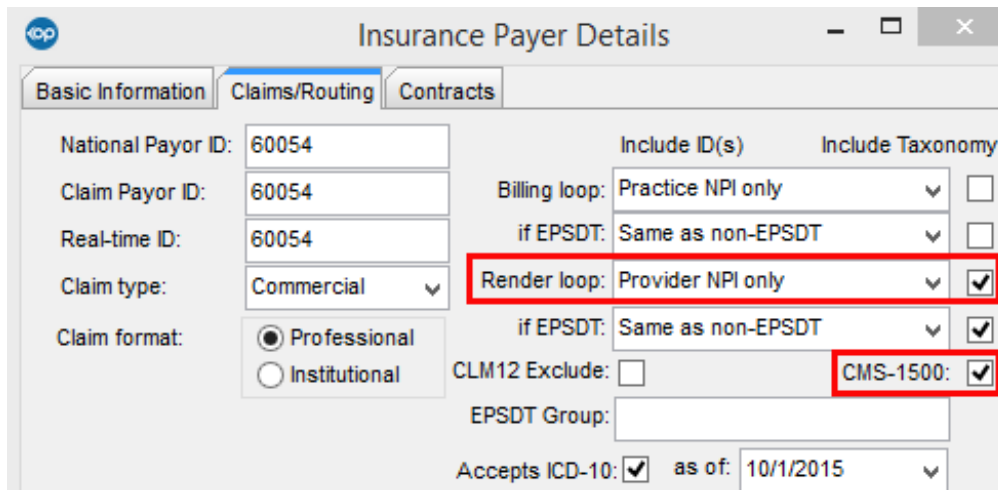
## Insurance Payer Setup

**Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details**

After verifying the taxonomy code exists in the Provider Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Rendering Loop dropdown.
- Do not select Suppress (don't include) from the Rendering Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Select the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance company that they want the same information on EPSDT and non-EPSDT claims. Then, mark the EPSDT checkboxes accordingly.



Basic Information		Claims/Routing		Contracts	
National Payor ID:	60054	Include ID(s)	Include Taxonomy		
Claim Payor ID:	60054	Billing loop:	Practice NPI only	<input type="checkbox"/>	
Real-time ID:	60054	if EPSDT:	Same as non-EPSDT	<input type="checkbox"/>	
Claim type:	Commercial	Render loop:	Provider NPI only	<input checked="" type="checkbox"/>	
Claim format:	<input checked="" type="radio"/> Professional <input type="radio"/> Institutional	if EPSDT:	Same as non-EPSDT	<input checked="" type="checkbox"/>	
		CLM12 Exclude:	<input type="checkbox"/>	CMS-1500:	<input checked="" type="checkbox"/>
		EPSDT Group:			
		Accepts ICD-10:	<input checked="" type="checkbox"/>	as of:	10/1/2015

## If Taxonomy is Required in Box 33b

If the insurance requires that the taxonomy code appear in box 33b of the claim, the following two Staff/Provider Directory and Insurance Payer Setup windows will need to be populated.

### Staff/Provider Directory

**Path: Utilities Menu > Manage Practice > Staff/Provider Directory > Practice Info tab**

The Practice Info tab of the Staff/Provider Directory houses the practice's taxonomy code. You will want to make sure that this is populated for each provider.

### Staff Directory

+ - ✎ ✓ ✗

[Basic Info](#) | [Data Visibility](#) | [Provider Info](#) | [Practice Info](#) | [IIS](#) | [Lab Links](#) | [e-Prescribing](#)

Report headings: OP Pediatric Center 602 Office Center Dr, Ste 350, Ft Washington  
 Alt. practice name:   
 Full address: 602 Office Center Dr, Ste 350, Ft Washington  
 Phone: 800-218-9916 Fax:   
 Pager:

**Billing/Pay-To Information**

Billing name: OP Pediatric Center  
 Billing address: 602 Office Center Dr, Suite 350  
 Billing city: Fort Washington State: PA ZIP: 19034  
 Pay-to address:   
 Pay-to city:  State:  ZIP:   
**Taxonomy: 208000000X**  
 Practice NPI: 1122334455  
 Line 17: lookup referral letter on Charges form (specialists only)

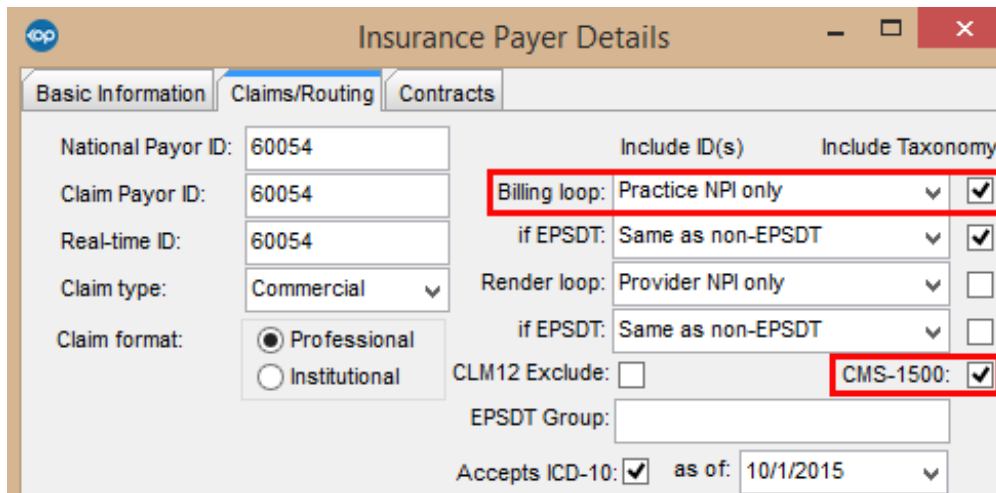
## Insurance Payer Setup

### Path: Utilities Menu > Manage Practice > Insurance Payers > Insurance Payer Details

After verifying the taxonomy code exists in the Practice Info tab, navigate to the details of your insurance payer. The Claims/Routing tab houses the setup for reporting taxonomy on claims.

- Select the Include Taxonomy checkbox next to the Billing Loop dropdown.
- (If the taxonomy needs to appear on a CMS-1500 claim form) Mark the CMS-1500 checkbox located below Include Taxonomy.

**Note:** If you are using EPSDT indicators, please verify with the insurance that they want the same information on EPSDT and non-EPSDT claims and mark the EPSDT checkboxes accordingly.



## Other Taxonomy Fields

As you work through your payer setup, you will notice other taxonomy fields in OP 14.

## Insurance Payers List

**Path: Utilities Menu > Manage Practice > Insurance Payers**

After navigating to the Insurance Payer table, you will need to ensure that your credentialed providers are associated to their respective billable insurances. For the steps on how to do this, visit [Connect Providers to Insurance Payers](#). Part of that credentialing may dictate that other ID Types and Numbers exist on a provider's claims. Additionally, there are Taxonomy fields located in this window. These fields are optional and will default to the provider's taxonomy from the Provider tab of the Staff/Provider Directory if kept blank.

**Warning:** Any information entered into the Insurance Carrier Provider Information window will override the other windows as described in the instructions above to populate taxonomy in boxes 24J and 33b.

### Insurance Carrier Provider Information ✕

**Participants:**

Payer: APP AETNA

Provider: SJK Sloan J. Knox, MD 305  Active

**Billing Data:**

	ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input checked="" type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

Medicaid Locator ID:

**Billing Data (EPSDT):**

	ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

**Financial Data:**

Fee schedule: FEE1 Capitation ID:

Note: