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.

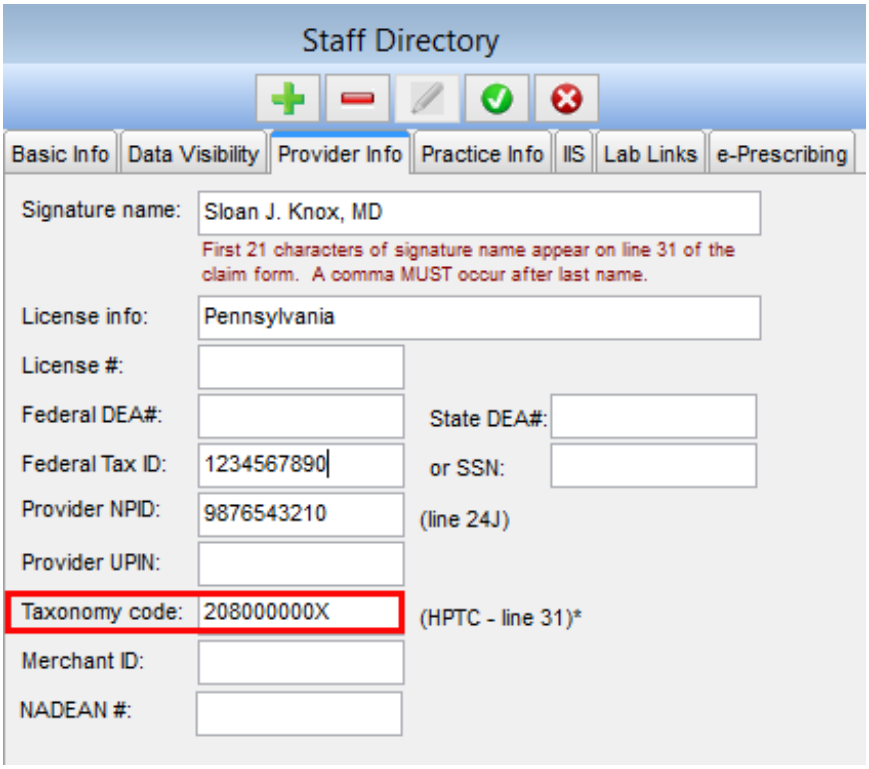
If Taxonomy is Required in Box 24J

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.



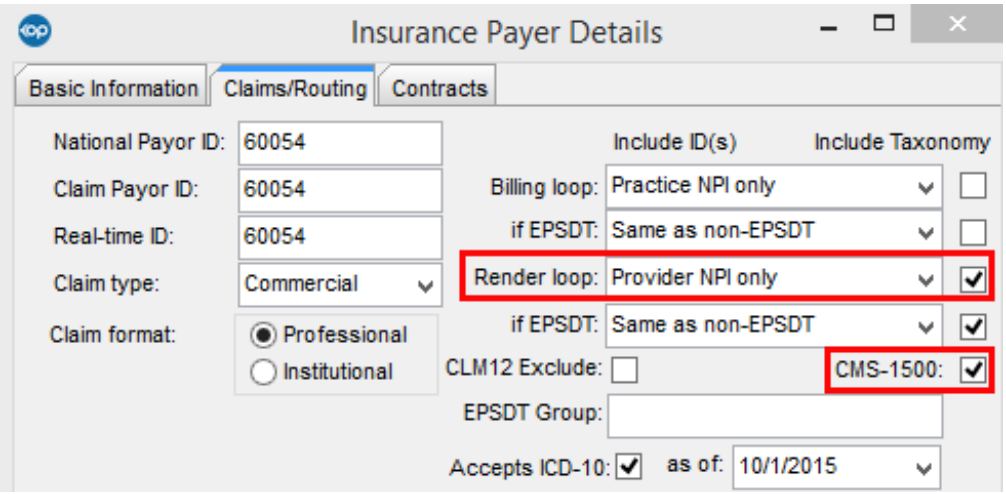
Insurance Payer Setup

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.



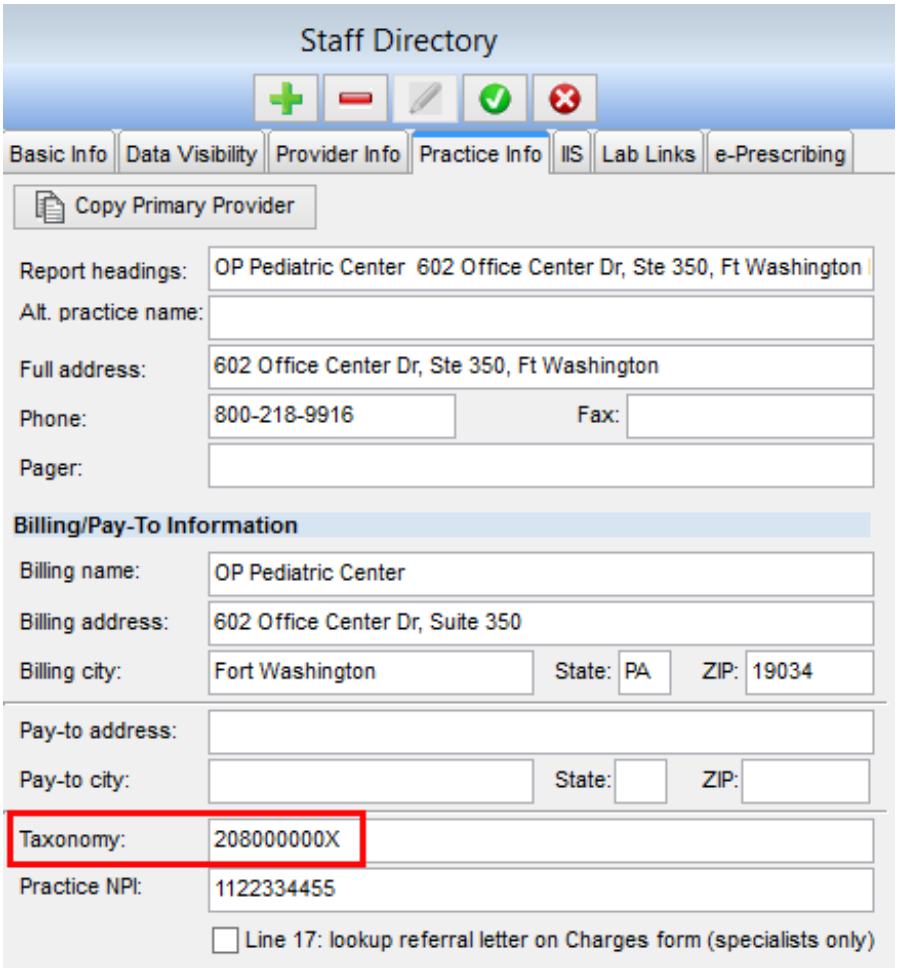
If Taxonomy is Required in Box 33b

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.



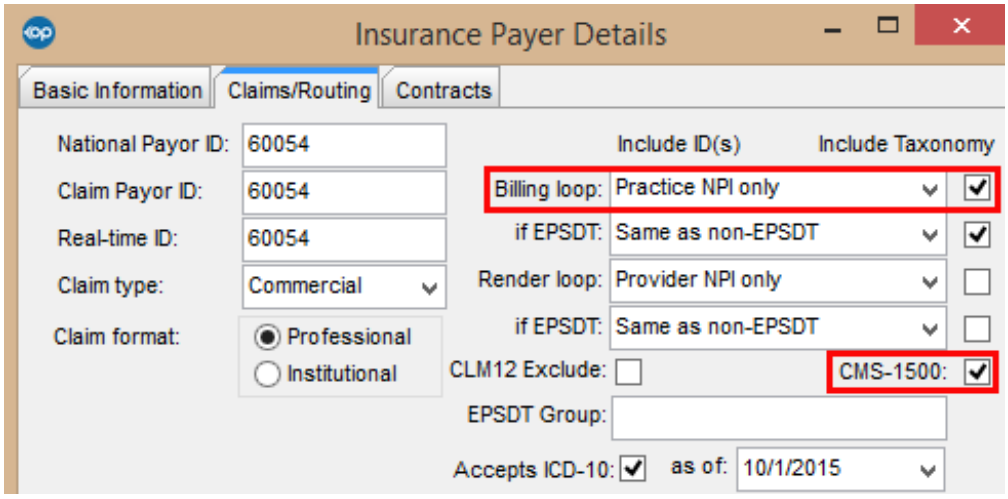
Insurance Payer Setup

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.



Other Taxonomy Fields

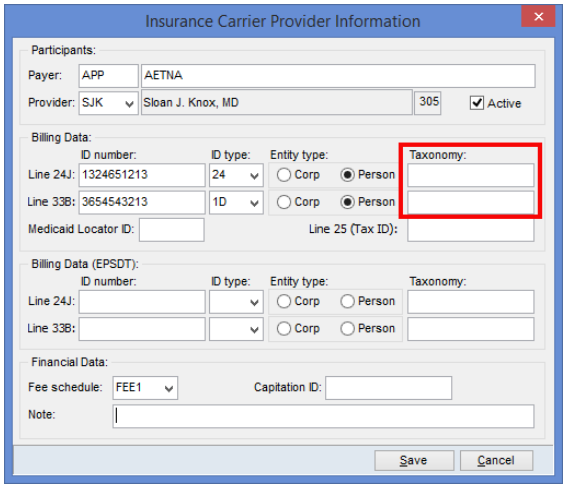
As you work through your payer setup, you will notice other taxonomy fields in OP 14.

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.

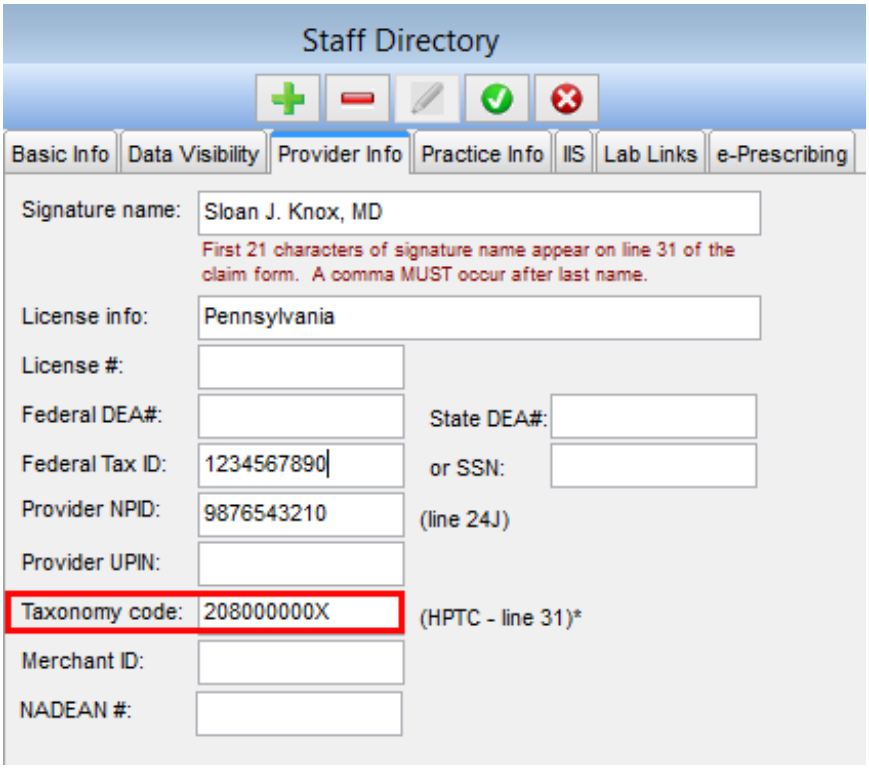
If Taxonomy is Required in Box 24J

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.



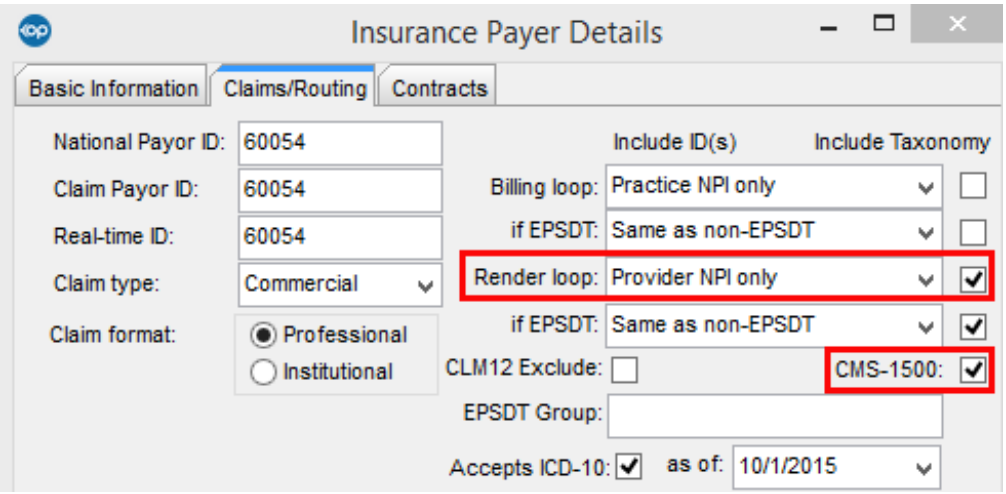
Insurance Payer Setup

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.



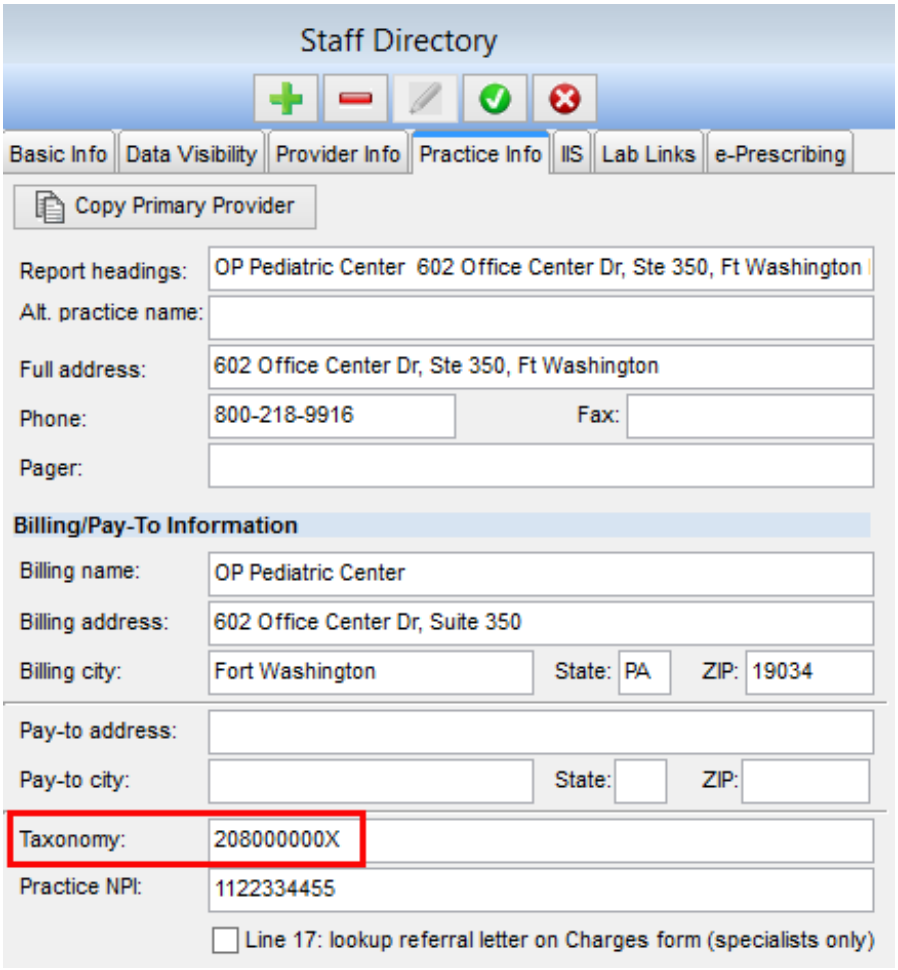
If Taxonomy is Required in Box 33b

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.



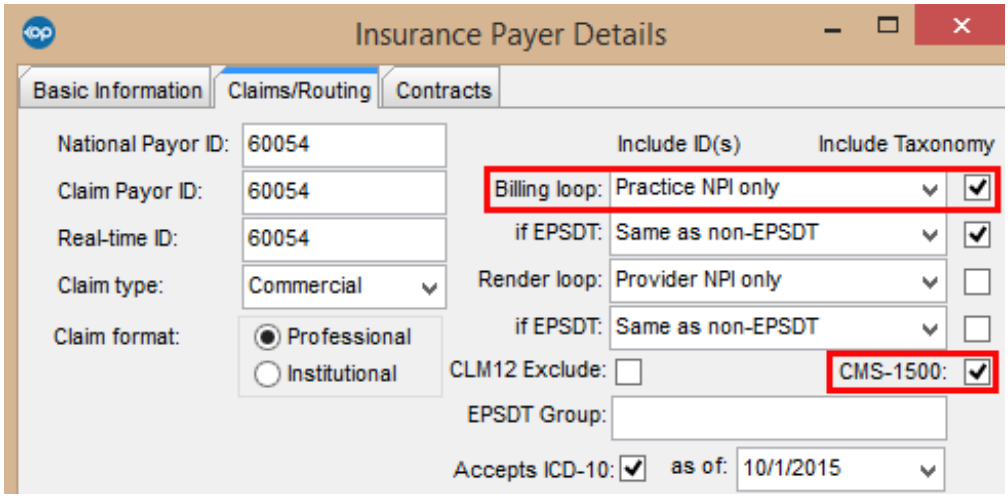
Insurance Payer Setup

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

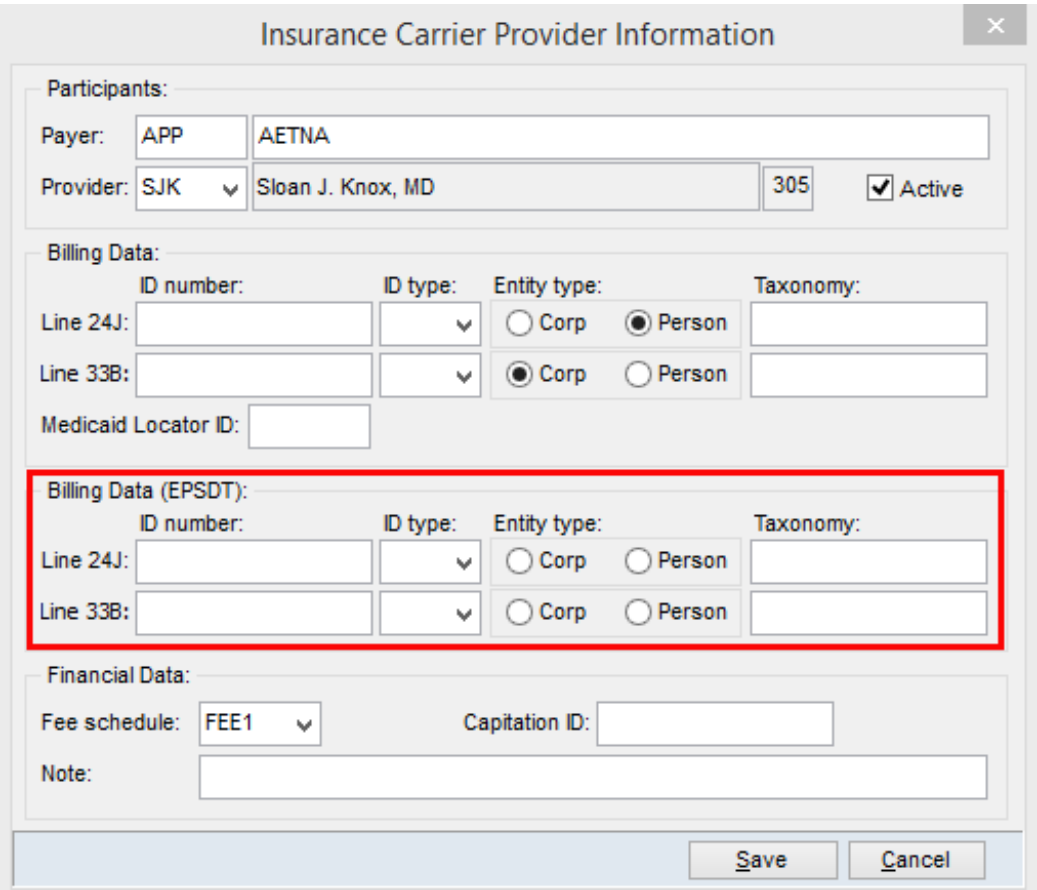
As you work through your payer setup, you will notice other taxonomy fields in OP 14.

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 14.10

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.

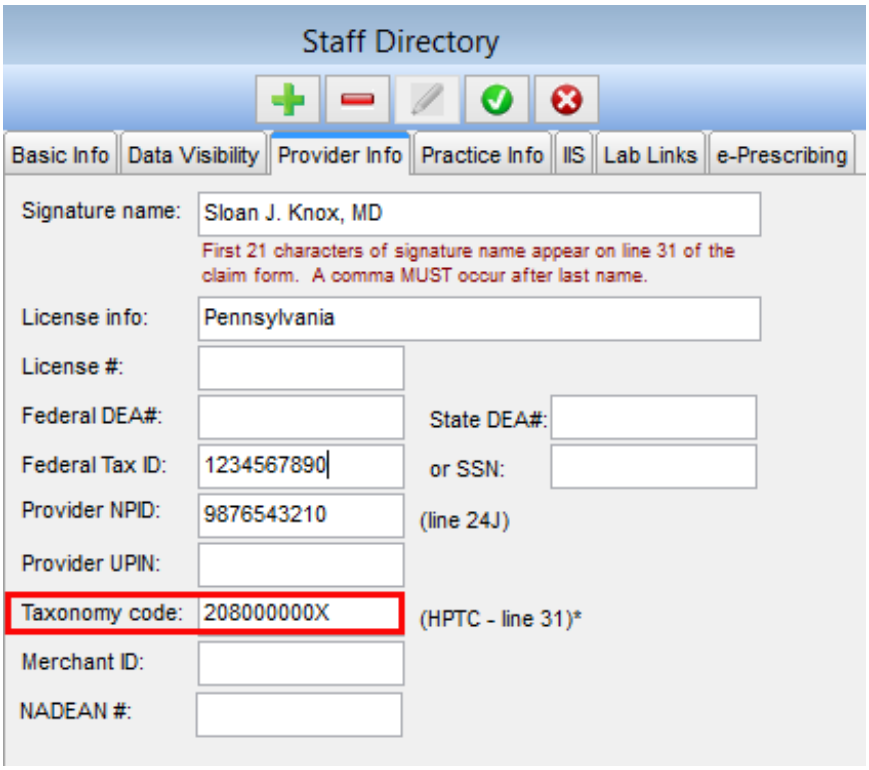
If Taxonomy is Required in Box 24J

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.



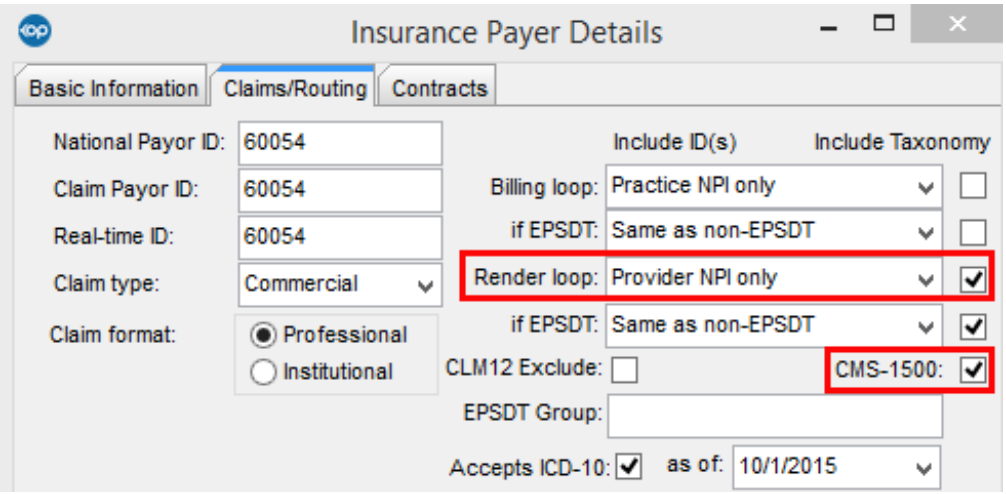
Insurance Payer Setup

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.



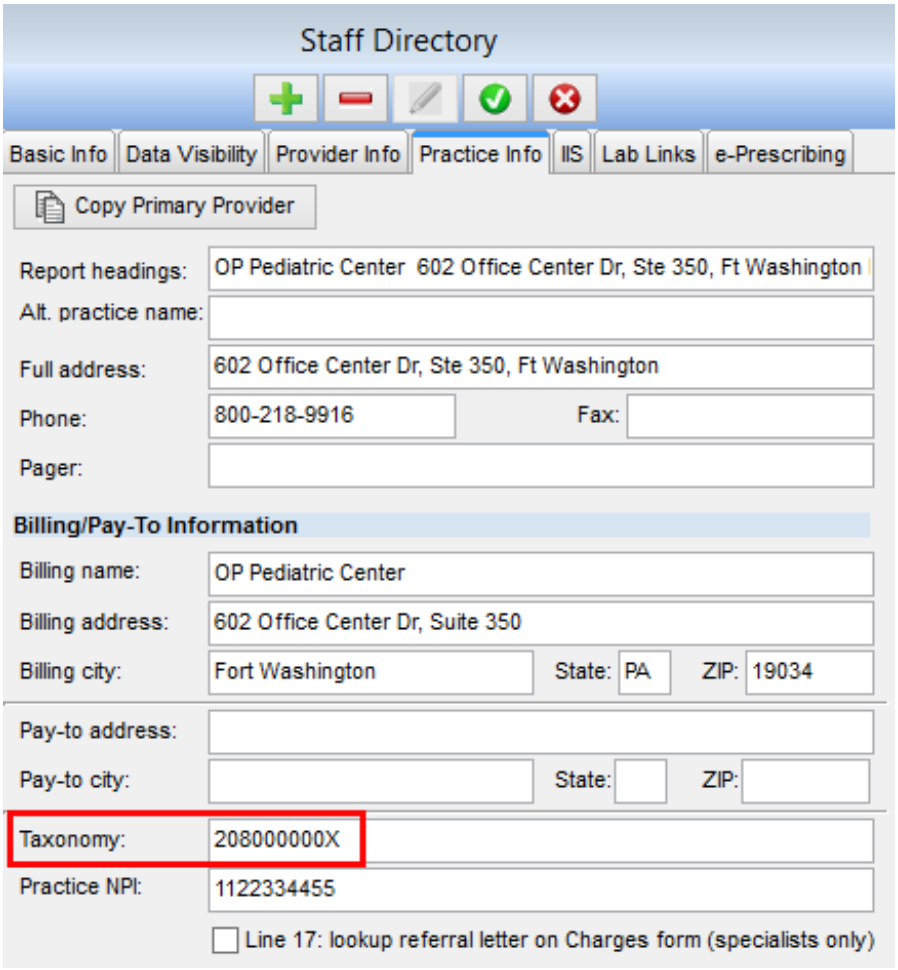
If Taxonomy is Required in Box 33b

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.



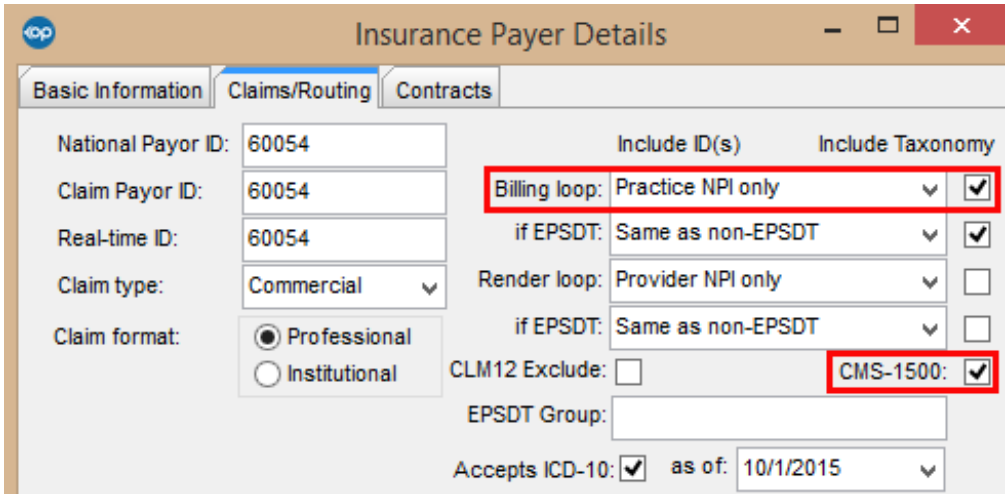
Insurance Payer Setup

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

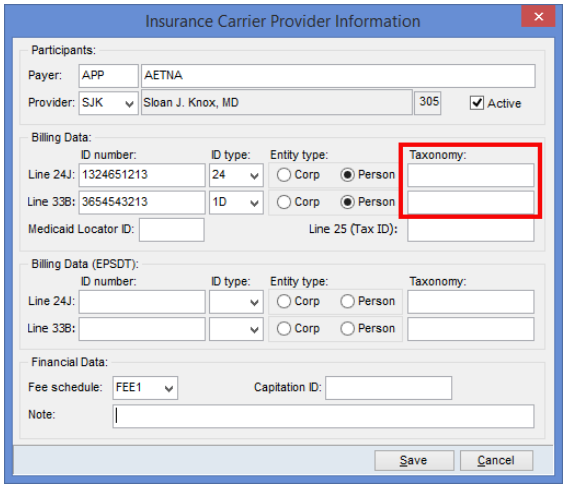
As you work through your payer setup, you will notice other taxonomy fields in OP 14.

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.

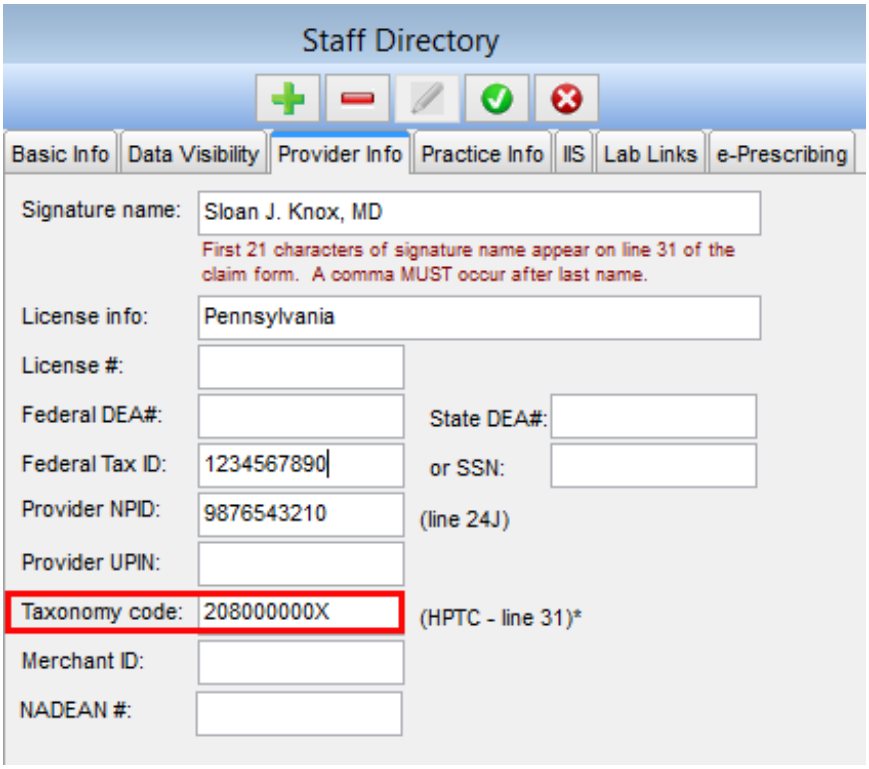
If Taxonomy is Required in Box 24J

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.



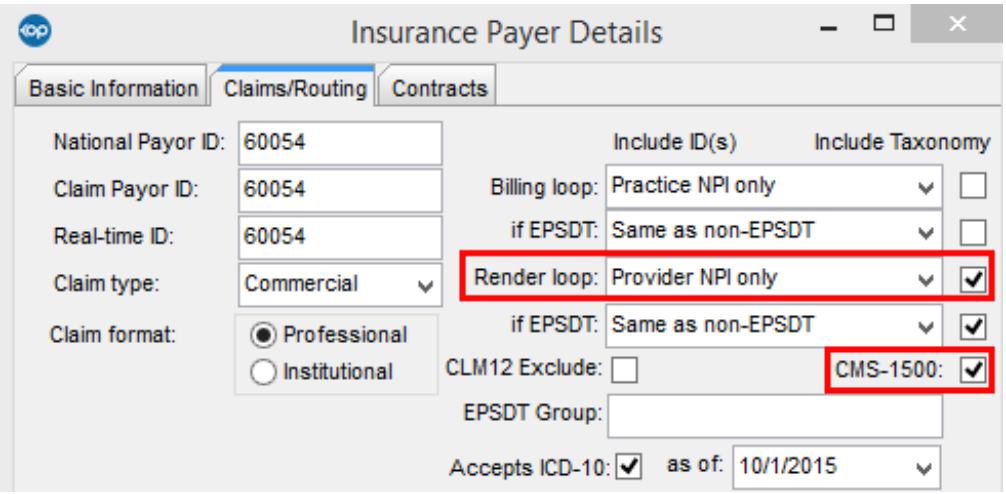
Insurance Payer Setup

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.



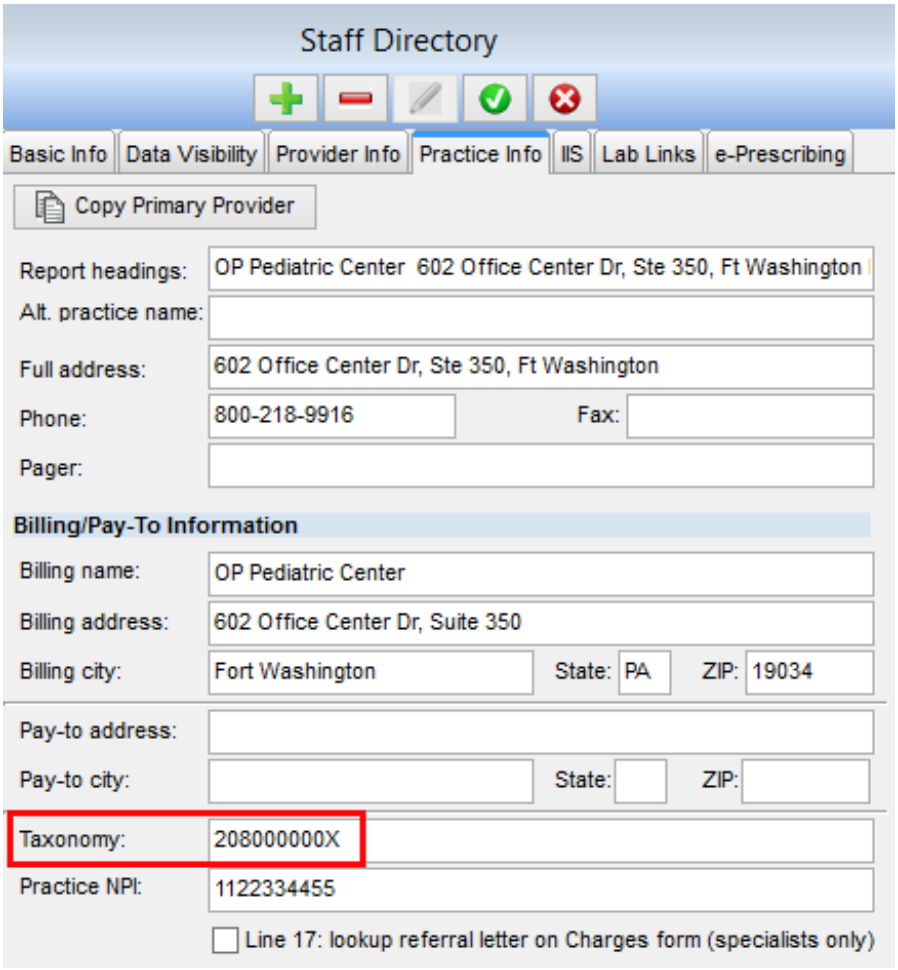
If Taxonomy is Required in Box 33b

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.



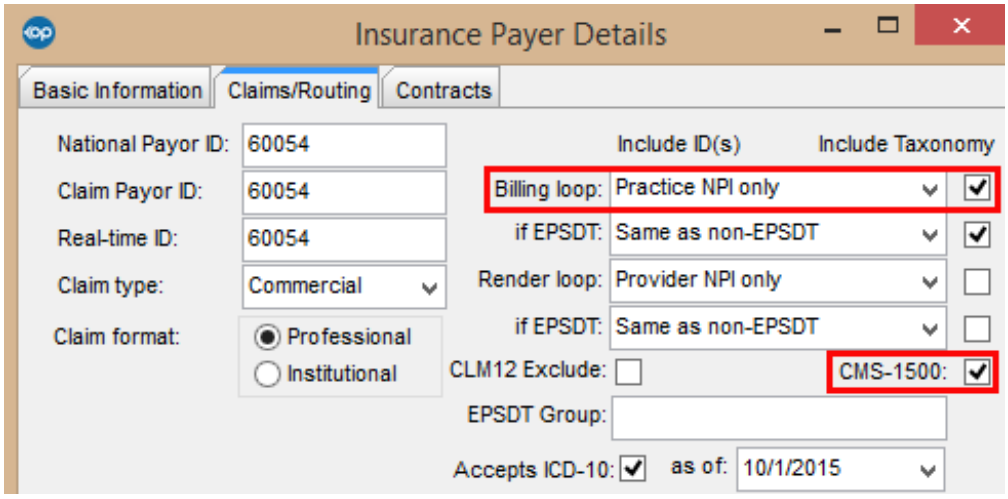
Insurance Payer Setup

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

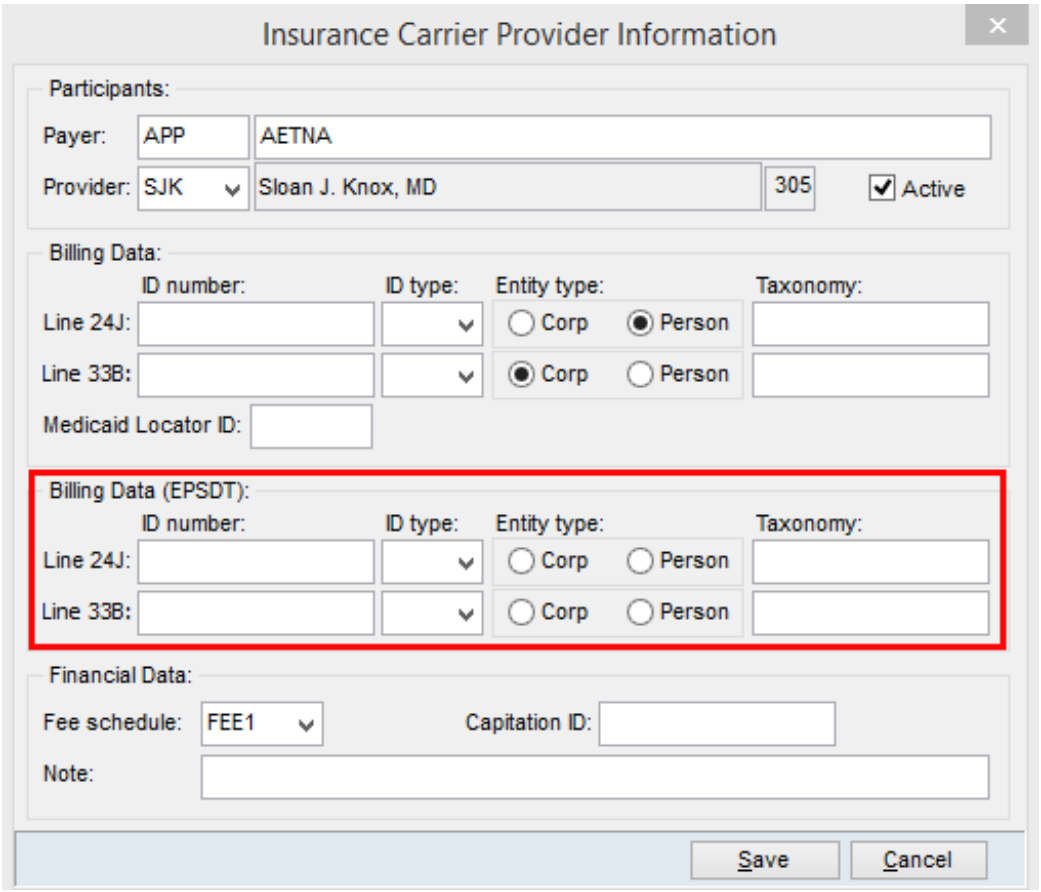
As you work through your payer setup, you will notice other taxonomy fields in OP 14.

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: Corp Person
Line 33B: Corp Person
Medicaid Locator ID:
Billing Data (EPSDT):
ID number: ID type: Entity type: Taxonomy:
Line 24J: Corp Person
Line 33B: Corp Person
Financial Data:
Fee schedule: FEE1 Capitation ID:
Note:
Save Cancel