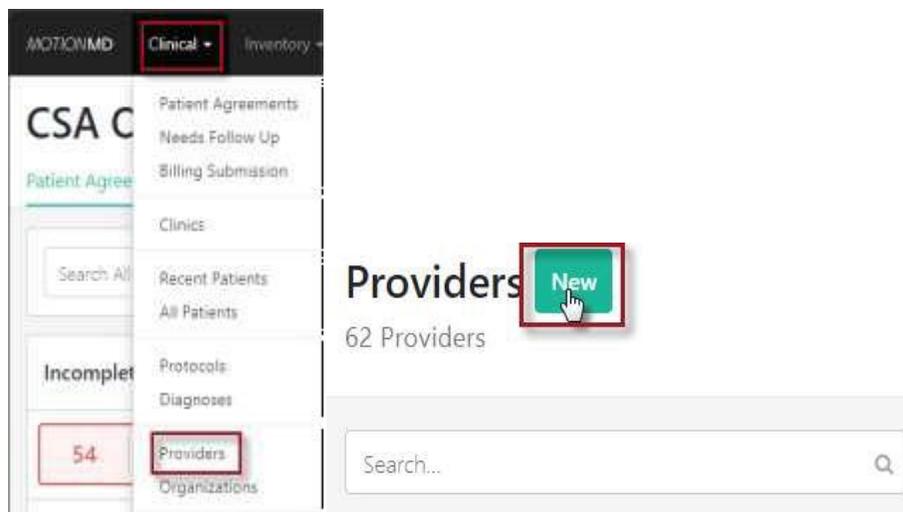


CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

To create a Provider with the External Provider role to view and sign off on Patient Agreements, navigate to the **Clinical Tab > Providers**. Select the **New** button on the Provider's page.



Add the new provider's NPI number and click the **Import Provider Data from Registry** button. This will send the NPI number to the NPI Registry to confirm the NPI number is valid and active.

After clicking the Import Provider Data button, the form will populate the **First Name, Middle Name, Suffix, Last Name, and Medical Professional Taxonomy (Specialty)** fields directly from the NPI Registry. Confirm the name of the provider is correct and click the Save Changes button.

Note: If an Organization is selected, there is an option to edit it before creating the provider.

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

Edit Provider
✕

NPI Number (Required)

Update Provider Data from Registry

NPI Number is required for all accounts in the United States.

Profile Information

Organization

Prefix First Name (Required)
Doctor

Middle Name Suffix

Last Name (Required)

State License Number

Medical professional taxonomy

Contact Information

Street

City State Zip Code

Phone Number Mobile Number

Email

Comments

Active?
Inactive providers remain visible on historical PAs and within Reports and Analytics

Cancel
Save Changes

After provider is created, Select **Create Provider User**

Providers > Sample Provider

Sample Provider Create Provider User

Details
Agreements
Agreements
Settings

ⓘ No Patient Agreements have been created for Sample Provider.

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

On the User Profile page, under the **General** tab, the Provider's Full Name and NPI# will automatically populate. Select the Next button to navigate to the Login tab.

User New

General Login User Settings

Title

First name *

Last name *

Organization

NPI Number

Only necessary for external Doctor role

Fitter Number

Only necessary for Fitters

Fax Machine Email

This is a fax-to-email address that can be used to fax a receipt to your fax machine. Usually in the form: 123456789@boomfaxeservice.com

Opt in to receive an email alerting of fiks that need review

Next

Under the Login tab, enter the **Provider's Email** address and select Next to navigate to the User Settings Tab.

User New

General Login User Settings

Login Information

Email Address

testemail@gmail.com

Next

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

Under the **User Settings** tab, a default location can be set by selecting the Current Location from the drop-down menu and select the option, “**Default location on PA Creation**”. The Time Zone can also be set accordingly. The **External Provider** role is automatically selected. **NOTE:** No other roles should be selected. Then select the **Create User**.

The screenshot shows the 'User Settings' tab in a web application. The 'Location Details' section includes a 'Current Location' dropdown menu set to 'CSA Ortho (South)'. Below it are three radio button options: 'Do not default location on PA creation' (selected), 'Default location on PA creation', and 'Default location if clinic IP address is matched'. The 'Time zone' dropdown is set to '(GMT-05:00) Eastern Time (US & Canada)'. The 'Security Information' section lists various roles, with 'External Provider' checked. At the bottom, there are 'Create User' and 'Cancel' buttons, with a mouse cursor pointing at 'Create User'.

General Login **User Settings**

Location Details

Current Location

CSA Ortho (South) ▾

Do not default location on PA creation
 Default location on PA creation
 Default location if clinic IP address is matched

Time zone

(GMT-05:00) Eastern Time (US & Canada) ▾

Security Information

Roles

- Admin
- Billing
- Clinical Coordinator
- Clinical Specialist
- Collector
- Commercial Billing
- Customer Care
- External Clinical Specialist
- External Provider**
- Intake
- Inventory Admin
- Inventory Counts
- Key Account Rep
- MotionIQ
- PA Creator (Do not add this role with any other role(s). PA Creator role is to be selected only for users with limited PA creation capabilities.)
- Procurement
- Protocol Creator
- Protocol Financial Reviewer
- PSR
- Sales Rep
- Scheduler
- VeriPro Collector

User type

System ▾

Create User Cancel

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

Once the User is created successfully, the provider will receive a welcome email to set up their user password to sign in.

NOTE: If a Provider hasn't been added yet to MotionMD, but they have an existing User Account, submit a Help Ticket to update the User to a Provider User account.

Error Messages

If the NPI number isn't in the Registry.

The screenshot shows a 'New Provider' form with a red error message box at the top stating 'NPI not found in NPI Registry'. Below the error, the 'NPI Number (Required)' field contains the value '1194917801'. To the right of the field is a green button labeled 'Import Provider Data from Registry'. At the bottom of the form, a note reads 'NPI Number is required for all accounts in the United States.'

If the NPI number has already been tied to a provider in MotionMD.

The screenshot shows a 'New Provider' form with a red error message box at the top stating 'Npi number has already been taken'. Below the error, the 'NPI Number (Required)' field contains the value '1194917807'. To the right of the field is a green button labeled 'Import Provider Data from Registry'. At the bottom of the form, a note reads 'NPI Number is required for all accounts in the United States.'