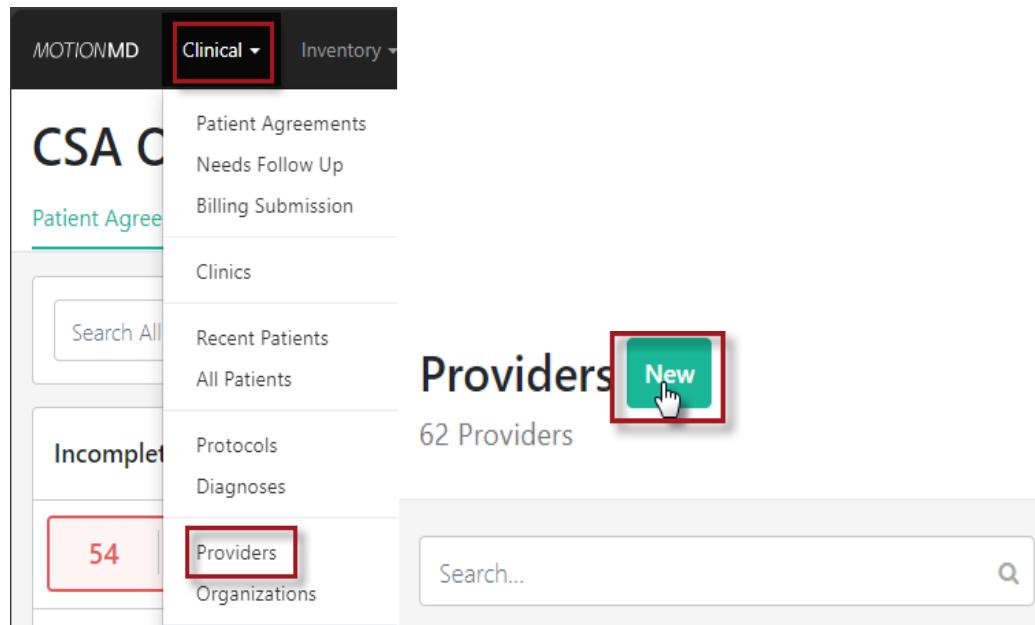


CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

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 **Import Provider Data from Registry**. This will send the NPI number to the NPI Registry to confirm the NPI number is valid and active.

A screenshot of the 'New Provider' dialog box. At the top, it says 'New Provider' and has a close button. Below is a 'NPI Number' field with a red box around the placeholder 'Add NPI Number'. A note below the field says 'NPI Number is required for all accounts in the United States.' To the right of the field is a green button with white text 'Import Provider Data from Registry' with a red box around it and a cursor icon pointing to it. At the bottom, there are 'Cancel' and 'Create Provider' buttons.

If the Provider Data is available, it will auto-populate the First Name, Middle Name, Suffix, Last Name and Medical Professional Taxonomy (Specialty) fields directly from the NPI Registry. Confirm the provider is correct and select **Create Provider**.

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

New Provider X

NPI not found in NPI Registry

NPI Number (Required)

Import Provider Data from Registry

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

Profile Information

Organization

Prefix First Name **(Required)**

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
Create Provider


After provider is created, Selected Create Provider User.

Providers / Sample Provider

Active Sample Provider

Details

Name

NPI Number

Address

Phone

Fax

Email

Specialty

Sales Rep

Link Sales Rep

Patient Agreements (0) Protocols (0) Notes

● No Patient Agreements have been created for Sample Provider

Create Patient Agreement
Create Provider User

Edit 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 *

Sample

Last name *

Provider

Organization

NPI Number

1275581373

Only necessary for External Doctor role

Filter Number

Only necessary for Filters

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: 1234560987@somefaxservice.com

Opt In to receive an email alerting of PAs 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

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**.

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

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

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.

CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

Error Messages

If the NPI number isn't in the Registry.

New Provider X

NPI not found in NPI Registry

NPI Number (Required)

Import Provider Data from Registry

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

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

New Provider X

Npi number has already been taken

NPI Number (Required)

Import Provider Data from Registry

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