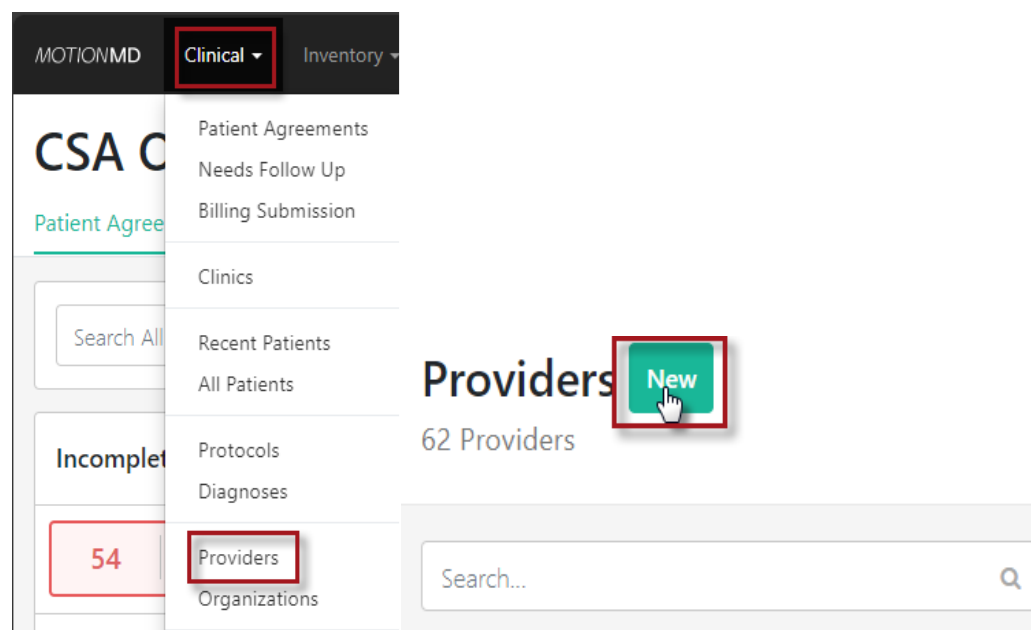


CREATING A PROVIDER WITH EXTERNAL PROVIDER ROLE

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.

New Provider

NPI Number

Add NPI Number

Import Provider Data from Registry

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

Cancel

Create Provider

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
×

NPI not found in NPI Registry

NPI Number (Required)

6589657485

Import Provider Data from Registry

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

Profile Information

Organization
Select Organization

Prefix

First Name (Required)

Middle Name

Suffix

Last Name (Required)

State License Number

Medical professional taxonomy
Select Specialty

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

Create Patient Agreement
Create Provider User
Edit Provider

Details

Name
Sample Provider
NPI Number
1235581373
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

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: 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

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
Cancel

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

NPI not found in NPI Registry

NPI Number (Required)

1194917801

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

Npi number has already been taken

NPI Number (Required)

1194917807

Import Provider Data from Registry

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