

# Next Step

## Show Facility Name and NPI as Rendering Provider in an 837 File

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### About

The workflow below describes how to set up the Billing Engine to show your Facility Name and Facility NPI as the Rendering Provider in an 837 file, a setup piece that is particularly applicable to Dispensing Agencies. The information is set up at the staff and Activity Code level and applies to a specific Party Type (e.g. if Party Type 4 is selected this would apply to **all plans** under Medicaid).

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The steps below are intended to be followed in order to complete the setup.

### Step 1: Employee Contractor Form Setup for Facility

1. Navigate to the Employee/Contractor List: **Maintenance and Setup > Employees > Employee/Contractor > Employee/Contractor.**
2. Click the **OK** button.
3. In the Employee/Contractor Form, click the **Add** button.
4. Complete the following fields in the Page 1 tab:
  - **Employee/Contractor ID:** Enter a number.
  - **Name:** Enter the name of your Facility.
  - **NPI No.:** Enter the Facility NPI No.
  - **837 Code Qualifier:** Enter **XX**. This field indicates there is an NPI # to go on claims.

The screenshot shows the 'Employee / Contractor Form - (EMPCONTL)' with two tabs: 'Page1' and 'Page2'. The 'Page1' tab is active. Fields include: Employee / Contractor ID (0338), Name (Facility), Address, City / State / Zip, Phone, Cell, Pager, Fax, Voice Mail, E-Mail, Social Security No., Tax ID No., Date of Birth, NPI No. (0123456789), and 837 Code Qualifier (XX). There are checkboxes for 'Display Rendering Provider on 837 in Referring Provider' and 'Don't Display Rendering Provider in loops (2310B/2420A) on 837 if no NPI'. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Exit (Esc)', 'Employee List', and 'Prov/SiteID Enroll'. A status bar at the bottom indicates '54 records loaded'.

5. Click the **Save** button.

### Step 2: Staff Form Setup for Facility

1. Navigate to the Staff List: **Maintenance and Setup > Employees > Staff > Staff.**
2. Select the Facility "staff entry" you created in Step 1 and click the **OK** button.
3. Click the **Edit** button.
4. Click the **Discipline** drop-down and select a discipline. You can select any discipline here.
5. In the **Taxonomy Code** field, enter your Facility's taxonomy code.
6. Click the **Save** button. Do **not** exit the window.



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## Step 3: Staff Enrollment Setup for Facility

1. While still in the Staff Form, click the **Staff List** button.
2. With the Facility still highlighted in the Staff List, click the **Auto-Enroll** button to enroll the Facility "staff entry" in all Party Types.

0337	Provider, Kteam		PSYCHIATRIST
0338	Golden DB, Training		

3. A window is displayed, "Process Complete!" Click the **Ok** button.
4. In the Staff List window, click the **Enrollment List** button.
5. Click the **Ok** button.

Staff Enrollment List - (STENRLL)

Staff Selector: 0338 Golden DB, Training

By Number  
 By Last Name

Locator: 0338

Staff #	Staff Name	Phone #	Party Type
0338	Golden DB, Training		0-County Of Financial Respon
0338	Golden DB, Training		1-Medicare
0338	Golden DB, Training		2-Blue Cross/Blue Shield
0338	Golden DB, Training		3-Other Insurance
0338	Golden DB, Training		4-Medicaid
0338	Golden DB, Training		5-Private Pay
0338	Golden DB, Training		8-Private Pay Percentage For S

6. Click the **Add** button. The Staff drop-down retains the Facility "staff entry."
7. Click the **Party Type** drop-down and select the Party Type.
8. In the **Provider Type** field, enter **MD**.
9. In the **Nat'l Provider Identifier (NPI)** field, enter the Facility NPI.
10. Click the **Save** button.

## Step 4: Setup Staff Enrollment Override by Activity Code

This is the Form used to override who the rendering provider is based on the Activity Code used.

1. Navigate to the Staff Enrollment Override by Activity Code Form **Maintenance and Setup > Staff > Staff Enrollment Override By Activity Code**.
2. Click the **OK** button.
3. Click the **Add** button.
4. Click the **Staff** drop-down and select the Facility "staff entry."
5. Click the **Enrollment Party Type** drop-down and select a Party Type.
6. Click the **Activity Code** drop-down and select the Activity Code this affects.
7. (Optional) Click the **Modifier** drop-down and select a modifier. Modifiers are additive, if you have modifiers attached to this Activity Code already, any selections here would be additional.
8. Click the **Save** button.

