

How To Add an External Provider

- Go to the Individual tab and find the individual you need to add the provider to.
- Click on the External Provider tab on the Nav Bar.
- Search to see if the provider is already in the system by clicking on the drop down box for Provider. (Names should be entered last name first; however, if the provider you are looking for cannot be located by the last name, you should look for first name as well.)

Add New Individual Provider

Type:

Provider:

- Once the correct provider is located, click Add From List.

Add New Individual Provider

Type:

Provider:

If you do not find the provider, you will need to add the provider in the next section.

- Add the Name – **this is the most important section**. Names must be added as this example: Last Name, First Name, Credentials - Smith, James MD
- Add Phone number, Address, Fax, Agency, NPI, etc. (if applicable). If an ROI was obtained, you can mark this here. And, if this is the individual's PCP, this can be checked here as well.
- Click Add New Provider.

Name:	<input type="text" value="Smith, John MD"/>	Type:	<input type="text" value="--- Select ---"/>
First Name:	<input type="text" value="John"/>	Last Name:	<input type="text" value="Smith"/>
Phone:	<input type="text"/>	Mobile:	<input type="text"/>
Email:	<input type="text"/>		
Address:	<input type="text"/>		
City:	State:	Zip:	<input type="text"/>
Company/Prov:	Agency: <input type="text" value="--- Select ---"/>		
NPI:	<input type="text"/>	Alt ID:	<input type="text"/>
Start Date:	<input type="text"/>	Term Date:	<input type="text"/>
ROI Obtained:	<input checked="" type="checkbox"/>	ROI Obtained Dt:	<input type="text"/>
		ROI Expires Dt:	<input type="text"/>
Is PCP:	<input checked="" type="checkbox"/>		
Notes:	<input type="text"/>		
<input type="button" value="Add New Provider"/>			