

Referring Doctor Master File

The Referring Doctor Master File is used for Referrals, Requisitions, Consults, Document Distribution, Letters, Labels, Envelopes, Printing, Faxing and Billing.

Master File Setup

- Practice Management > Practice Management Setup > Set Up Doctors > Referring Doctors > **New**

New Referring Drs / Primary Care Providers

Dr#	<input type="text" value="136"/>	Name	<input type="text" value="Last, First MI, eg M.D."/>		Document Distribution			
Address Line 1	<input type="text"/>				<input type="checkbox"/> Print			
Address Line 2	<input type="text"/>				<input type="checkbox"/> Envelope			
Address Line 3	<input type="text"/>				<input type="checkbox"/> Fax Time <input type="text"/>			
Private Phone #	<input type="text"/>	Modem #	<input type="text"/>		Ok to Fax to <input type="checkbox"/> Yes			
Regular Phone #	<input type="text"/>	Fax #	<input type="text"/>		NPI # <input type="text"/>			
Cell Phone #	<input type="text"/>	Email	<input type="text"/>					
Organization Name	<input type="text"/>				Practice NPI# <input type="text"/>			
URL	<input type="text"/>				<input type="checkbox"/> Exclude Local Send			
Direct Address	<input type="text"/>							
Specialty Code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Affiliation	<input type="text" value="Non-Member"/>		Charges	<input type="text"/>	Group Number <input type="text"/>			
Notes/Comments	<div style="border: 1px solid gray; height: 100px;"></div>				<input type="checkbox"/> Therapist			
					<input type="checkbox"/> No	<input type="checkbox"/> Direct	<input type="text" value="Send via Fax"/>	

ICo#	Insurance Company Name	Provider # (UPIN)	SetAll	Member of Plan
1I	Upmc Part A	<input type="text"/>		<input type="text" value="NO"/>
1P	Private Insurance	<input type="text"/>		<input type="text" value="NO"/>
2	Medicare NY Part B	<input type="text"/>		<input type="text" value="NO"/>

- Name:** This field is transmitted electronically and printed on forms. Changing the name in the Referring Doctor Setup will also change the patient's information screen.
 - Example:** Test Jr., Michael P., M.D.

Note: For Medicare Billing, this field cannot be more than 35 characters in length. ANSI HMOs and Blue Shield Billing will experience errors if the first or middle initials are more than 25 characters.

- **Address:** If only one address line is required, use Address 2 for City, State and Zip. The state should be abbreviated. Leave Address 3 blank.

a. Referring Doctor Address

Dr#	<input type="text" value="136"/>	Name	<input type="text" value="Test Jr., Michael P., M.D."/>
Address Line 1	<input type="text" value="2 Coulter Road, Suite 102"/>		
Address Line 2	<input type="text" value="Clifton Springs, NY 14432"/>		
Address Line 3	<input type="text"/>		

b. Referring Doctor Address with Post Office Box

Dr#	<input type="text" value="136"/>	Name	<input type="text" value="Test Jr., Michael P., M.D."/>
Address Line 1	<input type="text" value="2 Coulter Road, Suite 102"/>		
Address Line 2	<input type="text" value="PO Box 3"/>		
Address Line 3	<input type="text" value="Clifton Springs, NY 14432"/>		

c. Referring Doctor as a Specialty Group


Dr#	<input type="text" value="136"/>	Name	<input type="text" value="Community Cardiology"/>
Address Line 1	<input type="text" value="2 Coulter Road, Suite 102"/>		
Address Line 2	<input type="text" value="PO Box 4"/>		
Address Line 3	<input type="text" value="Clifton Springs, NY 14432"/>		

d. Referring Doctor as a Therapist

Dr#	<input type="text" value="136"/>	Name	<input type="text" value="Test, Michelle A., PTA"/>
Address Line 1	<input type="text" value="2 Coulter Road, Suite 105"/>		
Address Line 2	<input type="text" value="Clifton Springs, NY 14432"/>		
Address Line 3	<input type="text"/>		

Set Therapist Flag to **Yes**.

- **Regular Phone #:** Enter Phone Number (xxx)xxx-xxxx
- **Fax #:** Enter Fax Number (xxx)xxx-xxxx
- **NPI #:** Enter National Provider Identification Number. Click the blue link to access the NPI Registry.

- **Direct Address:** Enter the provider's direct address.
 - If you do not have the direct address, use the **N2N Directory Lookup**.
- **Specialty Code:** Enter the provider's specialty code. Click  for a list of specialties.
 - The Specialty Code or Taxonomy Code can be selected. The provider's specialty code is available from the NPI Registry.
 - Do not use Agency/Clinic Codes (F3 Home Health, F5 Hospice) for a provider.
- **Charges:**
 - a. **Yes:** Provider in practice, charges are entered
 - b. **No:** Not used in billing.

Allow this Ref Dr/PCP to be Used When Entering Charges

- **Group Number:** This field is optional for grouping doctors/providers under a practice name for reporting purposes.
- **Therapist:**
 - **Yes:** Provider is a therapist, including but not limited to: PT, OT, ST, Chiropractic, Aqua, Acupuncture, Family Counseling, Drug/Alcohol, Massage and Cardiac Rehab. This creates a provider quick pick list in Therapy Orders.
- **Direct:** Determines how items should be sent to the Referring Doctor from Send or DDCC. Choose from Direct, Fax or CCD.

Send via Direct


Send via Fax

Send C-CDA via Direct & Unstructured Documents via Fax

- **Notes/Comments:** Free text field.

Direct Address Setup

If you do not have the direct address:

- Click **Direct Address** at the top of the screen.
- Click **N2N Directory Lookup**.
- Enter search criteria and click  in the upper left corner.

N2N Directory Filter

Please choose the appropriate filters to determine which N2N entries to display.

City	
State	(abbreviated: NY, NJ, etc)
Zip	

Organization

Clinic Name	
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Provider

First Name	
Last Name	
Specialty	
NPI	

- After searching, click on the provider/practice name.
- *Would you like to use this record?* Confirm the information is correct and click **Yes**.

ACO Networks

This is an optional feature that may be set up.

- Click **ACO** at the top of the screen. This will show what ACOs are linked to the referring doctor.
- Click the gear icon  to add or remove doctors to the ACO Network.

Add Multiple N2N Providers/Organizations

The Referring Doctor Master File can be populated from the **Direct N2N Database** and multiple providers/organizations can be selected. If the provider/organization does not exist in the Referring Doctor File, a new one will be created and will include the name, address, phone number, fax number and direct address.

- Practice Management > Practice Management Setup > Set Up Doctors > Referring Doctors > **Add Multi N2N Prov/Org** (top of screen)
- Filter the N2N Directory by City, State and/or Zip. Narrow the search by entering the organization and/or provider's first and last name.
- Click the to see the results.

If the provider/organization already exists, the Referring Doctor Setup will be updated with the direct address.

Please check each referring doctor to make sure that the required fields have been completed. If the referring doctor's information is not added correctly, this will cause errors in documents and billing.

Resources

medent manual:

<https://www.medent.com/htmlmanual/html/v237/referringdoctorssetdr.html>

Videos:

https://medent.com/tutorials_mp4/Referring%20Doctor%20Setup%202026.mp4