

Updating Clinic Numbers in Med Access

A user with '**Site Administration**' privileges, you can update the Clinical Numbers available in your Med Access EMR.

From the main dashboard, click the '**Profile**' button.

Open the '**Site Settings**' Page.

From the Billing section drop down, select '**Clinic Numbers**'

The screenshot shows the Med Access 'Site Settings' page. On the left, the 'Administration' menu is visible, with 'SITE ADMINISTRATION' highlighted. The main content area shows the 'Site Settings' page with tabs for General, Privacy/Security, Templates, Site Macros, Scheduler, Billing, and Electronic Lab/D. The 'Billing' tab is selected, and the 'Clinic Numbers' option is highlighted in the dropdown menu. The 'Site Settings' form includes fields for Site Name, Session Timeout (90 mins), Warning Style (Bold, Red), CDS Warning Style (Bold), and CDS Pop-up Warning Style (Bold, Red). There are 'Save' and 'Reset' buttons at the bottom.

Add the new Clinic ID - The '**Description**' is what will show in the Bill picklist - The '**Code**' should be only the Clinic ID - Then click the 'Add' button to enter into the EMR

The screenshot shows the 'Billing Sites Management' section of the 'Site Settings' page. The 'Billing' tab is selected. The 'Billing Sites Management' section shows a table with columns for Description, Code, and Name. The 'Description' field is highlighted with a green box, showing '247 - Lakeside Clinic'. The 'Code' field is also highlighted with a green box, showing '247'. An 'Add' button is visible next to the 'Code' field. The table also shows an 'Original' column with the value '123' and a 'Name' column with the value '1a3'. The 'Code' column shows the value '123'. The 'Export options' are listed as Excel, PDF, and RTF.

Note - You can change the way these IDs appear in Bills with the ‘Sort Order’

Billing Sites Management

Table

Billing Sites

Description

Code

Use Privilege

Public

Edit Priv

Public

Original	Name	Code	Active	Sort
	247 - Lakeside Clinic	247	☒	1
	123	1a3	☒	5

Export options: Excel | PDF | RTF

Don't remove old Clinic IDs until you've updated your bill templates.

From the main dashboard, click the ‘**Templates**’ button.

Open the ‘**Bills**’ Page.

Click the Blue Chevron and Add the ‘**Clinic Number**’ to the filter

Template Management

Demog

Visits

Tasks

Bills

Meds

Profile

Labs

Inv

Bill Templates

Attending Provider: All

Name

Default Bill

INR

Search for criteria...

3rd Party

Batch Num

Billing Code

Claim Type

Clinic Number

Corporation Indicator

Diagnosis

Explan

Select your old ‘**Clinic Number**’ in the new Filter to only show Bill Templates with the old Clinic ID present

Bill Templates

Attending Provider: All

Clinic Number: 1a3

Name	Code	Diag.	Provider
Lakeside Default Bill			

Edit

Update any templates that show up in the list to the new Clinic ID

Bill Template

Template Name:

Edit Privilege:

Use Privilege:

Workflow Template:

Billing Provider*

Skill

Referring Provider

Location of Service

Clinic Number

Tariff 1 ☐ (EMR)

Code

Calls (qty)

Insurer

Once all templates are updated, remove the old Clinic ID from use

Return to the 'Site Settings' and uncheck the 'Active' flag on any unused/out of date Clinic IDs - This will remove it from being selected in Bills

Site Settings

General

Privacy/Security

Templates

Site Macros

Scheduler

Billing

Electronic Lab/DI

Features

History

Billing Sites Management

Table

Original

123

Name

Code

123

Active

Sort

Export options: Excel | PDF | RTF