Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Billing Preferences Crosswalk

Last Modified on 05/28/2020 1:01 pm EDT

Version 20.3

Overview

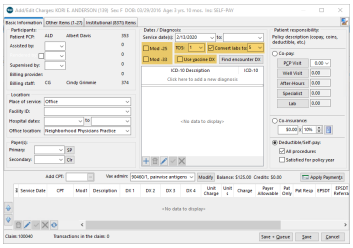
Several Billing Preference options have been relocated in the software (as of OP build 20.3.0) to:

- Allow for consistent preferences from user to user
- Give appropriate access to the correct users
- Align preferences in a way that is logical to the user

The sections below contain the location of several of these preferences before and after the release of OP version 20.3.0

Add/Edit Charges Window

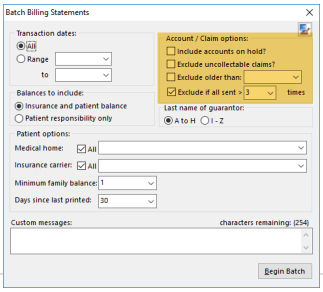
Original Path: Several

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Mod -25 checkbox • Mod -33 checkbox • TOS default • Convert labs to • Use Vaccine DX	**Removed** • Mod -25 checkbox • Mod -33 checkbox • TOS default • Convert Labs to **Relocated to Insurance Payer Details:** **Billing tab > Payers > Select payer > Payer Coding Rules tab** • Use Vaccine DX (***Note**: This setting was also removed from the Superbill-Pending Charges window.)*

Batch Billing Statements (Account/Claim Options)

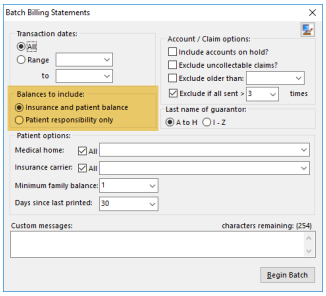
Original Path: Billing tab > Billing Center button > Statements tab > Bulk Stmts

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Include Accounts on Hold • Exclude Uncollectable	**Relocated to Global Preferences:** **Admin tab > Global Preferences > Billing tab > Statements tab**

	Claims? • Exclude older than • Exclude is all sent >	• Include Accounts on Hold • Exclude Uncollectable Claims? • Exclude older than (***Note**: This setting remains in the Batch Billing Statements window where the selection made in Global Preferences can be overridden.)* • Exclude is all sent >

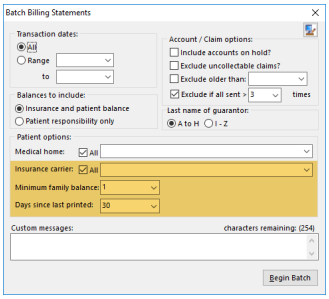
Batch Billing Statements (Balances to Include)

Original Path: Billing tab > Billing Center button > Statements tab > Bulk Stmts

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Insurance and patient balance • Patient Responsibility Only	**Relocated to Global Preferences:** **Admin tab > Global Preferences > Billing tab > Statements tab** • Insurance and patient balance • Patient Responsibility Only

Batch Billing Statements (Patient Options)

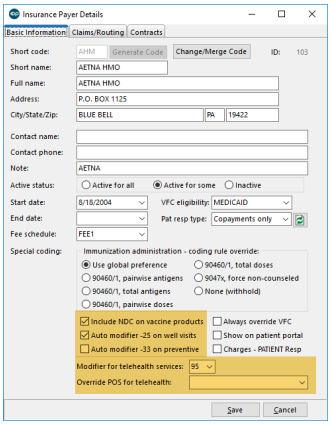
Original Path: Billing tab > Billing Center button > Statements tab > Bulk Stmts

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Insurance Carrier • Minimum Family Balance • Days since last printed	**Relocated to Global Preferences:** **Admin tab > Global Preferences > Billing tab > Statements tab** • Insurance Carrier • Minimum Family Balance • Days since last printed

Insurance Payer Details: Basic Information Tab

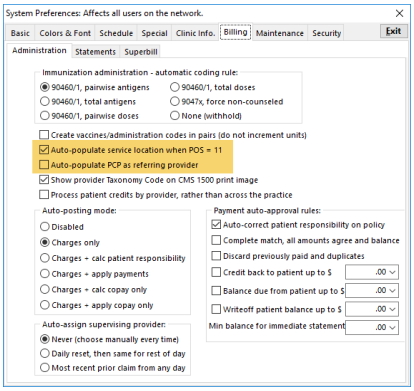
Original Path: Billing tab > Payers > New or Edit Payer > Basic Information tab

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Include NDC on vaccine products • Auto modifier -25	**Relocated to Payer Coding Rules:** **Billing tab > Payers > Select payer > Payer Coding Rules tab**

	on well visits • Auto modifier -33 on preventive • Modifier for telehealth services • Override POS for telehealth	• Include NDC on vaccine products • Auto modifier -25 on well visits • Auto modifier -33 on preventive • Modifier for telehealth services • Override POS for telehealth

System Preferences: Billing Administration

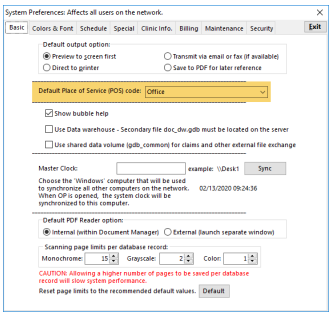
> **Original Path: Admin tab > Global Preferences > Billing tab > Administration tab**

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0
	• Auto-populate service location when POS = 11 • Auto-populate PCP as referring provider	**Relocated to Insurance Payer Details:** **Billing tab > Payers > Select payer > Payer Coding Rules tab** • Auto-populate service location when no facility specified *and* **Locations:** **Practice Management tab > Practices/Locations > Locations tab** • Auto-populate service location **Relocated to Insurance Payer Details:** **Billing tab > Payers > Select payer > Payer Coding Rules tab** *and* **Staff Directory:** **Practice Management tab > Staff/Providers > Provider Info tab** *and* **Locations:** **Practice Management tab > Practices/Locations > Locations tab** • Auto-populate PCP as referring provider

System Preferences: Basic

> **Path: Admin tab > Global Preferences > Basic tab**

View of Setting Prior to 20.3.0 *Click thumbnail to view full-size image*	Setting	Location of Setting in 20.3.0

	• Default Place of Service (POS) Code	**Relocated to Insurance Payer Details:** **Billing tab > Payers > Select payer > Payer Coding Rules tab** • Override POS, non-telehealth *and* **Locations:** **Practice Management tab > Practices/Locations > Locations tab** • POS