

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

#### 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 <i>Click thumbnail to view full-size image</i>	Setting	Location of Setting in 20.3.0
	<ul> <li>Include Accounts on Hold</li> <li>Exclude Uncollectable</li> </ul>	Relocated to Global Preferences: Admin tab > Global Preferences > Billing tab > Statements tab





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Back-Billing Statements     X       Transaction date:     Image: Construction construction       Bange     Image: Construction       Bange <th>Claims? • Exclude older than • Exclude is all sent &gt;</th> <th><ul> <li>Include Accounts on Hold</li> <li>Exclude Uncollectable Claims?</li> <li>Exclude older than (<i>Note: This setting remains in the Batch Billing Statements window where the selection made in Global Preferences can be overridden.)</i></li> <li>Exclude is all sent &gt;</li> </ul></th>	Claims? • Exclude older than • Exclude is all sent >	<ul> <li>Include Accounts on Hold</li> <li>Exclude Uncollectable Claims?</li> <li>Exclude older than (<i>Note: This setting remains in the Batch Billing Statements window where the selection made in Global Preferences can be overridden.)</i></li> <li>Exclude is all sent &gt;</li> </ul>
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## 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 <i>Click thumbnail to view full-size image</i>	Setting	Location of Setting in 20.3.0
Batch Billing Statements   Tansadon date:  To  To  To  To  To  To  To  To  To  To	<ul> <li>Insurance and patient balance</li> <li>Patient Responsibility Only</li> </ul>	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
Batch Billing Statements     Imanadion date:       Imanadion date:     Account / Chain options:       Imanadion date:     Imanadion date:       Imanadion     Imanadion       Imanadion     Imanadion    <	<ul> <li>Insurance Carrier</li> <li>Minimum Family Balance</li> <li>Days since last printed</li> </ul>	Relocated to Global Preferences: Admin tab > Global Preferences > Billing tab > Statements tab <ul> <li>Insurance Carrier</li> <li>Minimum Family Balance</li> <li>Days since last printed</li> </ul>

## 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 <i>Click thumbnail to view full-size image</i>	Setting	Location of Setting in 20.3.0
	<ul><li>Include NDC on vaccine products</li><li>Auto modifier -25</li></ul>	Relocated to Payer Coding Rules: Billing tab > Payers > Select payer > Payer Coding Rules tab





Insurance Parger Detail     Statis Enforcement     Statis Enforcement     Statis Enforcement     Statis Enforcement     Short name     ATIV     Address     Po. In     Constat name     Constat phone     Sart date     Secial coding     Im     O     O     O     O	iki X Reading Contract: Reading Contract:	on well visits <ul> <li>Auto modifier -33 on preventive</li> <li>Modifier for telehealth services</li> <li>Override POS for telehealth</li> </ul>	<ul> <li>Include NDC on vaccine products</li> <li>Auto modifier -25 on well visits</li> <li>Auto modifier -33 on preventive</li> <li>Modifier for telehealth services</li> <li>Override POS for telehealth</li> </ul>
⊻ In ₩ Au Modifi Overrii	Indek IKO on vacene produkti. Broken potertek IYC udo modifer 33 on preventike Infer for telehealth services ide POS for telehealth Save Cancel		

## System Preferences: Billing Administration

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

View of Setting Prior to 20.3.0 <i>Click thumbnail to view full-size image</i>	Setting	Location of Setting in 20.3.0
System Preferences: Affects all users on the network.	<ul> <li>Auto-populate service location when POS = 11</li> <li>Auto-populate PCP as referring provider</li> </ul>	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 > Staff/Providers > Provider         Info tab         and         Locations:         Practice Management tab > Practices/Locations >         Locations:         Practice Management tab > Practices/Locations >         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
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System Pederences: Affects all users as the network.         X           Bittl: Colors & Ford: Sanchie: San	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
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