

Important Content Update Message
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Advanced Workflow Rules Engine (OP AWARE) Overview


Last Modified on 12/11/2020 3:56 pm EST

Version 20.10

Path: Billing tab > More button (Customize group) > Advanced Workflow Rules

Overview

The Advanced Workflow Rules Engine (OP AWARE) is a tool used to build billing rules based on specific criteria. The functionality is similar to that of the former Block and Substitute feature, but OP AWARE provides an expanded list of superbill details and actions to build rules around. Some of the benefits of this expanded rule building include the opportunity to leverage **Billing Groups** and the ability to manage the complexity of CPT Code (or Group) occurrence and concurrency when a combination of superbill elements apply, without manual intervention from the billing staff. The window is displayed in two sections: **Triggers** and **Actions**.



Note: Previously created rules in the Block and Substitute window are automatically populated in the OP AWARE rule table. **It is not necessary to recreate rules that were already established for your practice.**

Both sections of the window must be completed to successfully build and apply the rule.

| Triggers (the "When") | Actions |
|--|--|
| <p>This section tells the story of when to trigger the rule. The criteria set here tells OP what to look for on a superbill when applying the rule at the time of superbill conversion. Click here to learn how to define Triggers. After defining the Triggers, you must complete the Action.</p> | <p>This section tells OP what to do with superbills for which the triggers have been met. There are seven Action options to choose from, and each option presents a different set of fields that may be completed. Click here to learn how to select the Action.</p> |
| | |

| | |
|---|--|
| <p>When</p> <p>Superbill contains: At least one CPT code or group is required</p> <p>CPT Group <input type="text"/> With the modifiers <input type="text"/> and <input type="text"/> when it occurs Anytime <input type="text"/> in the claim</p> <p>The superbill also contains:</p> <p>CPT Group <input type="text"/> With the modifiers <input type="text"/> and <input type="text"/> CPT Group <input type="text"/></p> <p>Patient's primary insurance has:</p> <p>National Payer ID <input type="text"/> Insurance Code <input type="text"/> Claim Filing Type <input type="text"/></p> <p>Service details include:</p> <p>Location <input type="text"/> Rendering Provider ID <input type="text"/> Diagnosis Code <input type="text"/></p> <p>Demographic information includes: ⓘ</p> <p>Patient age on date of service between <input type="text"/> and <input type="text"/></p> <p>Place of service:</p> <p>POS <input type="text"/></p> | <p>Perform the following action</p> <p><input type="text"/></p> <p>the following CPT code: Replace CPT above with: <input type="text"/></p> <p>On that CPT line include the following modifiers:</p> <p>Modifier 1 <input type="text"/> Modifier 2 <input type="text"/> Modifier 3 <input type="text"/> Modifier 4 <input type="text"/></p> <p>When adding a modifier listed above:</p> <p><input checked="" type="radio"/> Add to end after pre-existing modifiers <input type="radio"/> Insert before pre-existing modifiers <input type="radio"/> Replace any pre-existing modifiers</p> <p>On that CPT line add the following information:</p> <p>EPSDT <input type="text"/> EPSDT 2 <input type="text"/> Units <input type="text"/> 0 Diagnosis Code <input type="text"/> Diagnosis Group <input type="text"/> NDCID <input type="text"/> Claim Note <input type="text"/></p> |
|---|--|

Note: The Audit Trail of Changes to records located in the [Audit Logs](#) window will contain log messages when a billing rule is created or modified.

Version 20.8

Path: Billing tab > More button (Customize group) > Advanced Workflow Rules

Overview

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Note: Previously created rules in the Block and Substitute window are automatically populated in the OP AWARE rule table. **It is not necessary to recreate rules that were already established for your practice.**

Both sections of the window must be completed to successfully build and apply the rule.

| Triggers (the "When") | Actions |
|---|--|
| This section tells the story of when to trigger the rule. The criteria set here tells OP what to look for on a superbill when applying the rule at the time of superbill conversion. Click here to learn how to define Triggers . After defining the Triggers, you must | This section tells OP what to do with superbills for which the triggers have been met. There are seven Action options to choose from, and each option presents a different set of fields that may be completed. Click here to learn how to |

complete the Action.

When Superbill contains:
At least one CPT code or group is required

CPT Group With the modifiers and
when it occurs Anytime in the claim

The superbill also contains:

CPT Group With the modifiers and
CPT Group

Patient's primary insurance has:

National Payer ID
Insurance Code
Claim Filing Type

Service details include:

Location
Rendering Provider ID
Diagnosis Code

Demographic information includes: ⓘ

Patient age on date of service between and

Place of service:

POS

select the Action.

Perform the following action

the following CPT code:

Replace CPT above with:

On that CPT line include the following modifiers:

Modifier 1
Modifier 2
Modifier 3
Modifier 4

When adding a modifier listed above:

Add to end after pre-existing modifiers
 Insert before pre-existing modifiers
 Replace any pre-existing modifiers

On that CPT line add the following information:

EPSDT
EPSDT 2
Units 0
Diagnosis Code
Diagnosis Group
NDCID
Claim Note