

OP AWARE

Last Modified on 09/22/2021 3:51 pm EDT

Version 20.5

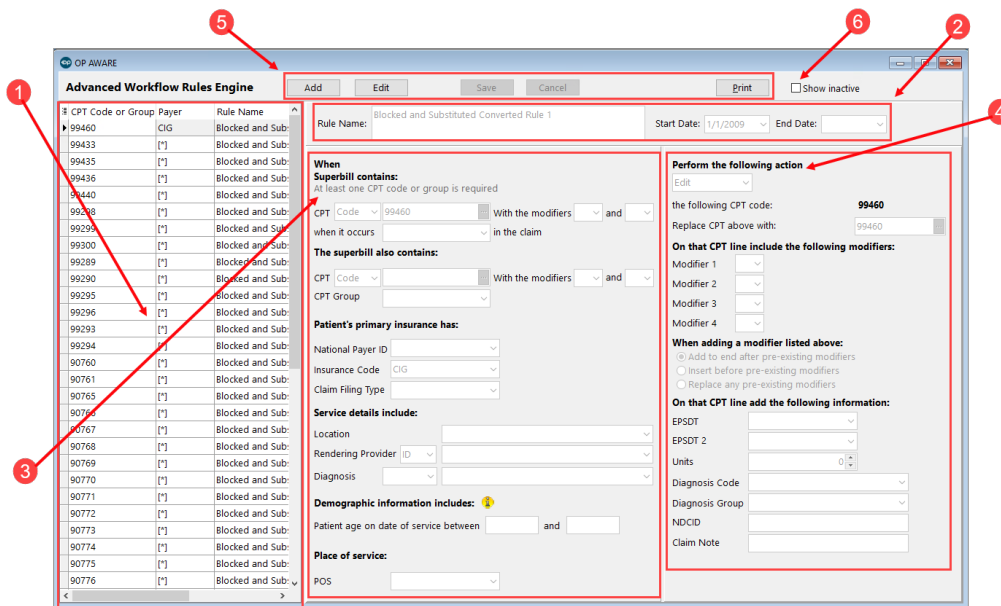


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About OP AWARE


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

The OP AWARE (Advanced Workflow Rules Engine) window is 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. The window contains a list of rules that have already been created on the far left as well as two rule-building sections: the Triggers and the Actions. Once a rule is saved, these two section displays the rule details when the rule is selected from the list.



OP AWARE Map

Number	Section	Description
1	Rule List	The Rule List displays all of the rules that were previously created in the Block and Substitute feature as well as new rules created in OP AWARE. The list can be widened by dragging the splitter that is visible when hovering over the right side of the vertical scroll bar. Selecting a rule in the list displays the rule details.
2	Rule Name and Date	<ul style="list-style-type: none"> • Rule Name: Each rule is required to have a unique Rule Name. • Start Date: The Start Date field auto-populates the current date when creating a new rule. For rules that were created in the former Block and Substitute feature, the Start Date reflects when the rule was originally created. • End Date: The End Date field is not required, and should only be used if the rule

		has a firm end date. The End Date cannot be removed or extended if a Billing Group included in the rule is Inactive.
3	Triggers Section	The Triggers section of the window, or the "when", tells the story of when to trigger the rule. The criteria set here tell OP what to look for on a superbill when applying the rule at the time of superbill conversion.
4	Action Section	The Action section of the window 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.
5	Function Buttons	<ul style="list-style-type: none"> • Add: The Add button is used to display a blank form for a new rule to be created. • Edit: The Edit button is used to edit the fields in the rule selected in the Rule List. • Save: The Save button saves the new or edited rule. • Cancel: The Cancel button cancels the creation of a new rule or the edits for an existing rule. • Print: The Print button prints the Rule List as it is displayed on-screen. To remove or add columns to the display, use the Show/Hide columns button  prior to clicking the Print button.
6	Show Inactive	The Show Inactive checkbox is used to display rules that have reached their End date.