Payment Processing Rules - Actions

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Version 21.2

Path: Billing tab > More button (Customize group) > Payment Processing Rules

<< Return to the Payment Processing Triggers

Disclaimer:

- **Part II** of creating a new Payment Processing Rule is covered in this article (**Payment Processing Rules - Actions**).
- **Part I** of creating a new Payment Processing Rule is covered in the **Payment Processing Rules - Triggers** article.

To create a new rule, you **must** complete the steps in the **Triggers** article BEFORE completing the steps in this article.

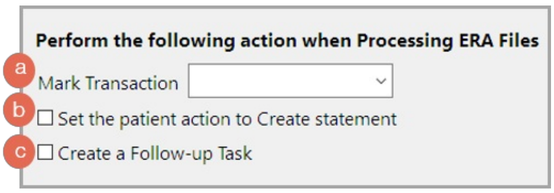
About

After completing all of the applicable triggers for the Payment Processing rule, the Actions section located on the right-side of the window must be completed in order to tell OP what to do when processing ERA files that fit the criteria outlined for the rule. If you have not yet entered the rule Triggers, click **here** to return to the Triggers section of the workflow.

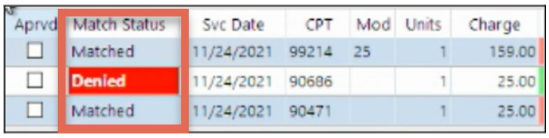
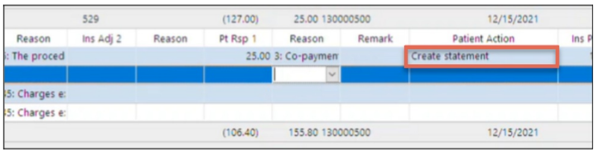
User Permission: To access the module, users must have the **Billing_Payment_Processing_Rules** security permission.

Perform the following action when Processing ERA Files

Select one or more of the following fields in the Perform the following action when Processing ERA Files. This is required when creating a rule. Based on the Payment Transaction Contains setting defined in your rule, you can set one or more of the following actions: **Mark Transaction** status, **Set the patient action to Create Statement**, or **Create a Follow-up Task**.



Use the table below to complete the Actions for the rule.

a	**Mark Transactions**: The match status selected here will be applied to the line items that meet the selected rule criteria when processing the ERA.  Select a **Match status** option from the drop-down: • Match • Review • Appeal • Discard **Example**: If a payer always denies a certain CPT code, set the rule triggers to match that scenario, then choose Matched from the Mark Transactions drop-down to accept the write-off.
b	**Set the patient action to Create statement**: Select the checkbox to automatically set the **Patient Action** field to **Create statement** when you processes the ERA files that match the selected rule criteria. 

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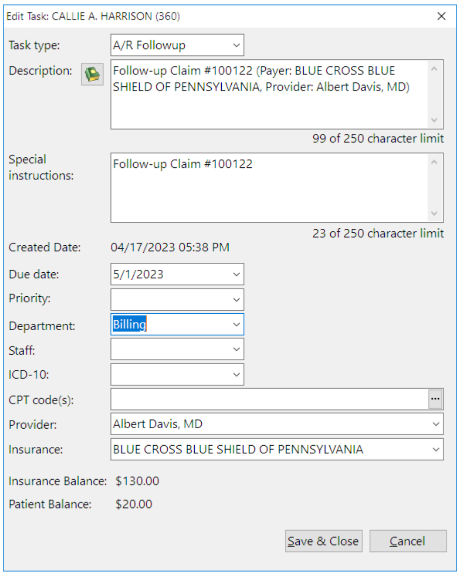
Create a Follow-up Task: Select the checkbox to automatically create a follow-up task when the Payment Transaction criteria is met.

> **Note**: Duplicate tasks will not be created. If more than one rule is set up to create a follow-up task, only 1 will appear in the patient's chart.

The task will have the following information**defaulted** in:

- **Task Type:** A/R Follow-up
- **Description:** Will contain the words**Follow-up** with the **claim #** and **provider**.
- **Special Instructions:** Will contain the **claim #**.
- **Due date:** 2 weeks after the created date.
- **Department:** What is set up in the ERA Payment Default Department setting (**Practice Management** > **Departments** > **Default Task Assignment**).
- **Provider**: The rendering provider on the transaction.
- **Insurance**: Pulls the insurance that is on the claim.
- **Patient Balance**: Displays the patient balance from the claim.



After you have completed the Actions section of the rule building, click the**Save** button at the top of the Payment Processing Rules window to save your rule.