Payment Processing Rules - View and Edit Rules

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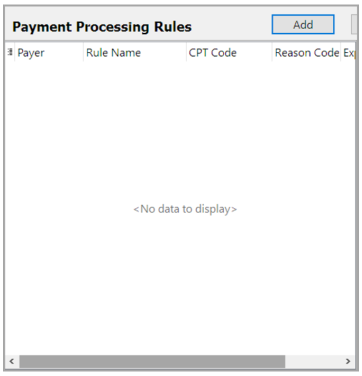
Version 21.2

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

About

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

Payment Processing rules can be viewed and edited from the **Payment Processing Rules** window.



Viewing Payment Processing Rules

All active payment processing rules will appear in the left-hand grid. By default the grid will show the **Payer**, **Rule Name**, **CPT Code**, **Reason Code**, and **Expired Date**. The **Start Date** column is available to show in the grid. Filter and sort by every column by clicking the **column header** or the **filter** icon.

To show or hide columns:

1. Click the **hamburger** button to the left of the column headers.
2. Select columns to show them, and deselect columns to hide them.

Edit A Payment Processing Rule

1. Navigate to the **Payment Processing Rules Module** window by following the path above.
2. Select a **rule** from the grid on the left side of the window
3. Click the **Edit** button.
4. The criteria **fields** become editable and display the rule information. Make the desired changes.

Note: Depending on the rule that you are editing, the Insurance Code field or the Claim Filing Type field may be disabled. If you want to edit either of those fields:

- If the **Insurance Code** field is disabled: Clear out the **National Payer ID** first.
- If the **Claim Filing Type** field is disabled: Clear out the **Insurance Code** field first.

5. Click the **Save** button.
6. The updated rule will appear in the grid.