

Utilizing Posting Validations



This document is designed to introduce the user to Posting Validations.

eTHOMAS
Posting
Validations

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Posting Validations Introduction

Posting Validations are checks users can create to “catch” specific scenarios during the Posting Charges process. A Validation warning will present itself for any claim that does not meet the criteria specified. This could ultimately save your office time and money from rejections and slow payments.

Set Up

System Settings

The system setting PostVal must be activated to use Posting Vlidations. You can set this up Utility | Settings | System Settings. Add the setting by clicking on the Plus sign to add it, with a value of 1.

Accessing Posting Validations

Access Posting Validations through Billing | Posting Validations. Click the Plus sign to add a new validation.

The left screenshot shows the 'New Posting Validation' window. It has fields for Name, Message, and Description. Below these is a table with columns: Combine, Not, Field, From, To, Equal, and a plus icon. The right screenshot shows the 'Custom Validation - NEED TO USE CLAIM TYPE WC' window. It has the same fields as the left window. The table below has two rows: the first row has 'AND', a checked box, 'Claim Type', a dropdown, 'From', a dropdown, 'To', a dropdown, 'Equal', and a dropdown; the second row has 'AND', an unchecked box, 'Primary Financial Code', a dropdown, 'From', a dropdown, 'To', a dropdown, 'Equal', and a dropdown.

In the example above, a validation has been created to warn the user when the Claim Type is not equal to WC and the Primary Financial Code is equal to WC. In this case we want to be warned that the claim type is missing WC.

The screenshot shows the 'THOMAS Posting Charges' window. At the top, it says 'Post Charges' and 'Using Active Benefit Copay: \$0.00'. Below this are fields for Primary, Secondary, Tertiary, Claim Status, and Route Slip. To the right are fields for Claim Type, Location, Doctor, Header, Bill Type, Doc Ind, Doc Type, Referral, and Illness. A warning dialog box is open in the foreground, asking 'NEED TO USE CLAIM TYPE WC WOULD YOU LIKE TO POST CHARGES ANYWAY?' with 'Yes' and 'No' buttons.

eTHOMAS gives users the flexibility to post charges anyway or correct the claim. Posting Validations could ultimately help your office save time and money; as these validations may be used to help prevent known rejections/edits.

When you are creating Posting Validations keep in mind that you are setting up the system to look for specific scenarios and to catch those scenarios. It is recommended to set up some sample validations and using them to make sure the validations will work for your office.

Sample Validations

We have put together some sample validations so that you can see how this feature can work for your office.

Example 1

Dr 02 has not received credentials from Medicare. In the meantime, all those charges for Dr 02 should be entered for Dr 01 until the end of the year. When Claim Doctor is equal to 02 and the Claim Primary Fin Code is equal to MR a validation message will be presented at the time of posting.

The screenshot shows a window titled "Custom Validation Edit" with a blue header bar that reads "Custom Validation - DR 02 IS NOT CREDENTIALLED". Below the header, there are three main sections: "Name:", "Message:", and "Description:". The "Name:" field contains the text "DR 02 IS NOT CREDENTIALLED". The "Message:" field contains the text "POST ALL CHARGES FOR DR 02 UNDER DR 01 FOR MEDICARE UNTIL THE END OF THE YEAR.". The "Description:" field is empty. To the right of the "Message:" field is a blue button labeled "Add Field". Below these fields is a table with columns: "Combine", "Not", "Field", "From", "To", and "Equal". The table has two rows of data. The first row has "AND" in the "Combine" column, an unchecked checkbox in the "Not" column, "Claim Doctor" in the "Field" column, an empty "From" field, an empty "To" field, and "02 - CHRISTIN" in the "Equal" column. The second row has "AND" in the "Combine" column, an unchecked checkbox in the "Not" column, "Claim Primary Fin Code" in the "Field" column, an empty "From" field, an empty "To" field, and "MR" in the "Equal" column. At the bottom of the window are three icons: a green square, a red X, and a blue square.

Combine	Not	Field	From	To	Equal
AND	<input type="checkbox"/>	Claim Doctor			02 - CHRISTIN
AND	<input type="checkbox"/>	Claim Primary Fin Code			MR

Example 2

The office wants to ensure that whenever the Primary Financial Code of WC is used on a claim that the Claim Type of WC is used for reporting purposes. When Claim Type is NOT equal to WC and Claim Primary Fin Code is equal to WC a validation message will be presented at the time of posting.

Custom Validation Edit





Custom Validation - NEED TO USE CLAIM TYPE WC

Name:

Message:

Description:

Combine	Not	Field	From	To	Equal
AND	<input checked="" type="checkbox"/>	Claim Type			WC - WORKER
AND	<input type="checkbox"/>	Claim Primary Fin Code			WC

Example 3

The office wants to make sure Modifier 22 is used when the Primary Insurance Code of AETNA is used on a claim for a range of procedure codes. When Claim Primary Insurance Code is equal to AETNA, Procedure Code Range of 00142-10060, and modifier 22 is NOT present a validation message will be presented at the time of posting.

Custom Validation Edit





Custom Validation - NEEDS MODIFIER

Name:

Message:

Description:

Combine	Not	Field	From	To	Equal
AND	<input type="checkbox"/>	Claim Primary Ins Code			AETNA
AND	<input type="checkbox"/>	Procedure Code	00142	10060	
AND	<input checked="" type="checkbox"/>	Modifier			22

Example 4

The office has been getting rejections because they are not including an Illness/Injury date on their claim headers when reporting a facility (and for their specialty they need to do this). When Header Facility is equal to the entire range of

Facility Codes and the Injury Illness Date is NOT filled in (notice the date is an old previous date and a far future date) a validation message will be presented at the time of posting.

The screenshot shows a window titled "Custom Validation Edit" with a subtitle "Custom Validation - ILLNESS/INJURY DATE". It contains fields for Name, Message, and Description. Below these is a table with columns: Combine, Not, Field, From, To, Equal, and a trash icon. The table has two rows: one for "Header Facility" with "12345" in the From field and "WBH" in the To field, and another for "Injury Illness Date" with "01/01/2001" in the From field and "03/14/2116" in the To field. The "Injury Illness Date" row has a checked checkbox in the "Not" column. An "Add Field" button is to the right of the table. At the bottom are icons for help, error, and delete.

Name: ILLNESS/INJURY DATE

Message: FACILITY IS FILLED IN AND YOU DO NOT HAVE AN ILLNESS/INJURY DATE IN THE HEADER

Description: THIS IS THE DESCRIPTION

Combine	Not	Field	From	To	Equal	
AND	<input type="checkbox"/>	Header Facility	12345	WBH		
AND	<input checked="" type="checkbox"/>	Injury Illness Date	01/01/2001	03/14/2116		

Add Field

Example 5

Any patient who is flagged for Collection should have that flag removed when they visit the office again, as they are a re-activated patient. When Patient Collection is equal to Yes (checked) a validation message will be presented at the time of posting.

The screenshot shows a window titled "Custom Validation Edit" with a subtitle "Custom Validation - RE-ACTIVATED PT". It contains fields for Name, Message, and Description. Below these is a table with columns: Combine, Not, Field, From, To, Equal, and a trash icon. The table has one row: "Patient Collection" with "Yes" in the Equal field. The "Not" checkbox is unchecked. An "Add Field" button is to the right of the table. At the bottom are icons for help, error, and delete.

Name: RE-ACTIVATED PT

Message: PATIENT IS RE-ACTIVATED, REMOVE COLLECTION FLAG

Description:

Combine	Not	Field	From	To	Equal	
AND	<input type="checkbox"/>	Patient Collection			Yes	

Add Field

Example 6

The office wants to make sure that when they use the Facility of SG in the patient header, the Place of Service is equal to 1 (inpatient) to avoid rejections. When Place of Service is NOT equal to 1 and the Header Facility is equal to SG a validation message will be presented at the time of posting.

The screenshot shows a window titled "Custom Validation Edit" with a sub-header "Custom Validation - CHECK POS". The window contains the following fields and controls:

- Name:** CHECK POS
- Message:** CHECK POS, THIS IS AN INPATIENT CLAIM
- Description:** (Empty text area)
- Add Field** button
- Validation Rule Table:**

Combine	Not	Field	From	To	Equal	
AND	<input checked="" type="checkbox"/>	Place of Service			1	
AND	<input type="checkbox"/>	Header Facility			SG	

At the bottom of the window are three icons: a green square, a red X, and a blue trash can.