Company Setting: Check for New or Established Patient Procedure

Last Modified on 05/23/2025 3:56 pm EDT

The **Check for New or Established Patient Procedure** Company Setting for Claim Validation Rules allows users to determine when charges should be classified as a New Patient Visit or an Established Patient Visit. Enabling this setting will apply claim validation rules based on the New Patient indicator on the procedure code. This setting will automatically check the new patient indicator during claim validation and fail the claim validation if there are existing claims for them, as they are not considered a new patient.

	Claim	Validation Rules (CARUL)			
Groups	Settings	. ,			
Company Setting	Value				
Miscellaneous (1)]	If checked, claims with procedure codes marked with once per year will be validated.			
Authorization (1) Authorization (Primary) (10)		Checked is Yes/True. Unchecked is No/False			
Authorization (Secondary) (10) Authorization (Tertiary) (10)	Setting	Check for New or Established Patient #110 🔅	٦		
Claim (3)	Value	V			
Diagnosis (18)		Webselved eleise velidelies evice will be explicit been			
Entities (5)		on the New Patient indicator on the procedure code			
Insurance (5)		Checked is Yes/True. Unchecked is No/False			
Payments (4)			_		
Procedure (20)	Setting	Check for monthly procedure codes #111 🏩			
Procedure (Special Codes) (11)	Value	✓			
		If checked, claims with procedure codes marked with once per month will be validated.			
		Checked is Yes/True. Unchecked is No/False	Ţ		
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Please note that since we don't show claim validation rules within Company Settings, this setting should be accessed by right-clicking anywhere within an open claim and selecting **Claim Rules** > **Procedure** to select

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Closed - Electronic Superbill	Primary	msaini	2				Authorization (1)	<u>^</u>						
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Steps to Complete

- 1. Go to Billing > Claim Query
- 2. Find any claim and open it (alternatively, you can open a claim from any other screen)
- 3. Right-click anywhere within the open claim and click Claim Rules
- 4. Select Procedure
- 5. Search for the Company Setting for Claim Validation Rules: "Check for New or Established Patient Procedure"
- 6. Set the Value to the Checked Position (described in detail below)
- 7. Save

Value Options

Unchecked = No/False

Claim Validation Rules will **NOT** be applied based on the New Patient indicator on the procedure code.

Checked =Yes/True

Claim Validation Rules will be applied based on the New Patient indicator on the procedure code.