Rule Manager and AltitudeAssist™ Guide

Applicable to Claim Manager Peak Clients

V10 – October 2025

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Overview

Rule Manager, using Rule Wizard or Rule Builder with **Altitude**Assist^{TM}, allows **Claims Manager Peak** clients to create "simple" rules to help with your claims processing. Users with the **Rule Wizard-Admin** permission can create/edit the rules on their own within your Waystar portal as explained in this guide—or your organization can work with your Waystar representative to create these rules.

Rule Manager provides:

- A summary screen to preview rules as you create them.
- A list of your created rules.
- The ability to edit, deactivate, or reactivate rules.
- The ability to test the rules thoroughly before using them in your Production environment.

Note: Rules built within Rule Manager are the last to fire in the claims processing pipeline. When you want to use **Claim Selectors** such as **Provider Name** (Rendering, Attending, etc.), the account must have Provider Name Matching enabled because the claim has already passed through front end enrollment and claim rules. If you do not have Name Matching enabled, you can select to use a different **Claim Selector** that pertains to the provider, if available.

Granting user permissions for Rule Manager

Users must be granted the following specific permissions to use or view rules created with Rule Manager.

Note: A user with both of the following permissions will be seen by the system as Rule Wizard-Admin.

- **Rule Wizard-Admin**: For Admin users, it grants the authority to create or build rules, edit rules, and so forth.
- **Rule Wizard – View-Only Access**: For non-admin users to view certain areas of Rule Manager. They will not have full access that the admin user will have.

Benefits of using Rule Manager

When working with claims, your organization can face the following:

- Health Information Systems (HIS)/Provider Management Systems (PMS) often cannot support all the various payer-specific rules and regulations when submitting a claim.
- Rules can vary from payer to payer.
- If the claims data is not correct when submitting to a payer, the claim could potentially become denied at the payer level causing rework and a delay in claim adjudication and provider reimbursement.

With **Rule Manager**, your organization can create claim rules to:

- Reject claims prior to being submitted to a payer.
- Modify claims in such a way as to help ensure that the payer can successfully process the claim.
- Save time and improve productivity for billing staff by reducing the need for them to touch the claim.
- Reduce Support Cases when a simple custom rule will work instead.

What's a "simple" rule (versus a "complex" rule)?

Your organization can use Rule Manager to create **"simple" rules** as defined by:

- Rule attributes available from Rule Builder > Claim Selector tab.
- The ability to either reject a claim or modify claim data.
- The ability to use up to five rule statements. For example, for Institutional Claims you want a rule to find claims with a revenue code of 510 AND with a procedure code of 99201 OR with a procedure code of 99203. This rule uses **three** rule statements. These are also referred to as AND/OR rule statements because they are always created as an AND statement or an OR statement as explained in this guide.

A **"complex" rule** would include one or more of the following:

Note: To request complex rules, submit a Support case to Waystar.

- More than five AND/OR rule statements.
- Contains calculations or is dependent on another rule firing.
- Requires a field to be copied from another field.
- The rule contains claim fields not available on the Claim Selector tab of Rule Builder.

For more information, see the Claim Fields and Claim Form Locator.

Using the Rule Listing screen

Overview

The Rule Listing screen lets you view and search for any previously created rules and perform actions such as edit, deactivate, or activate. Also from this screen you can start the process for creating a new rule.

Note: Users must have specific permissions to access this screen; see the Granting user permissions for Rule Manager section of this guide.

Accessing the Rule Listing screen

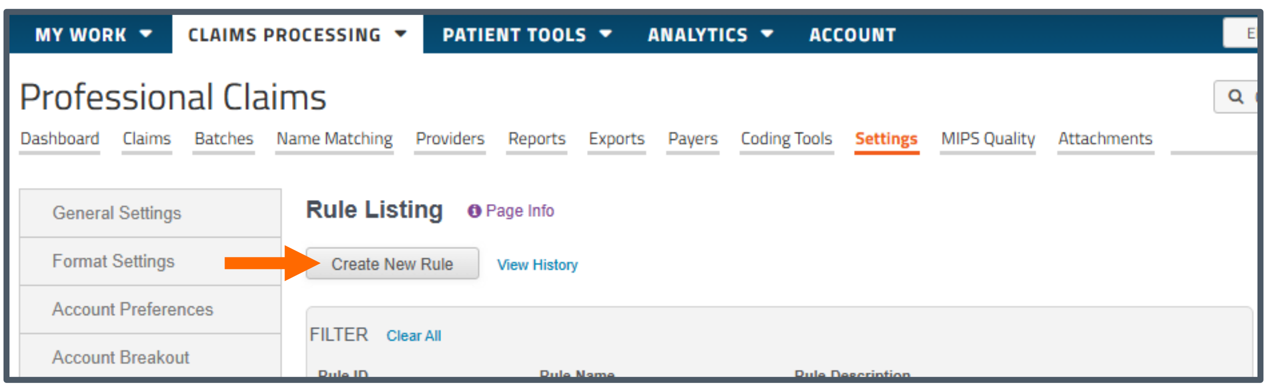
To access the Rule Listing screen:

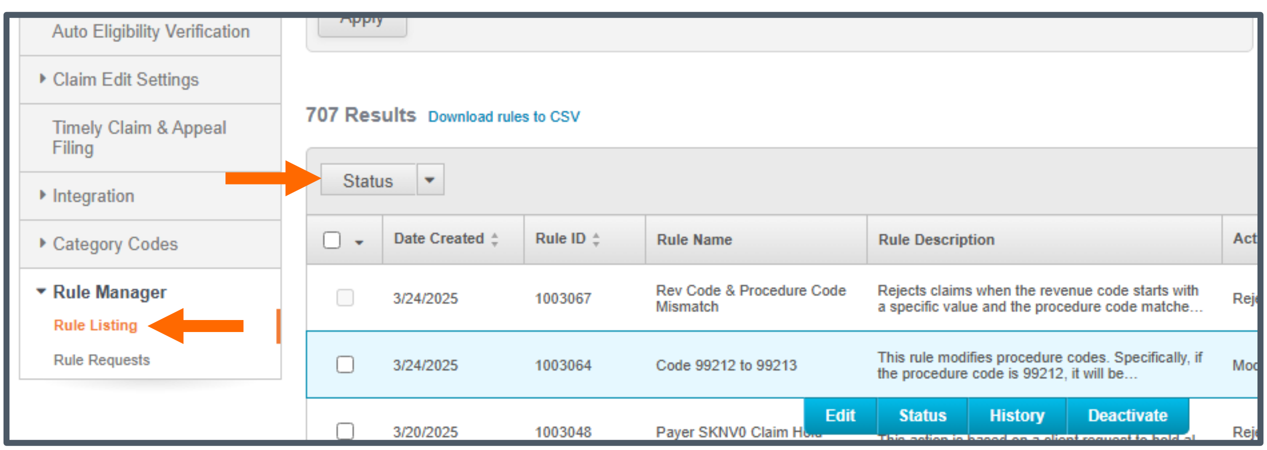
1. Log into your Waystar portal.
2. Go to **CLAIMS PROCESSING** > **Professional Claims** or **Institutional Claims** > **Settings** > **Rule Manager** > **Rule Listing**.

   The Rule Listing screen will open.

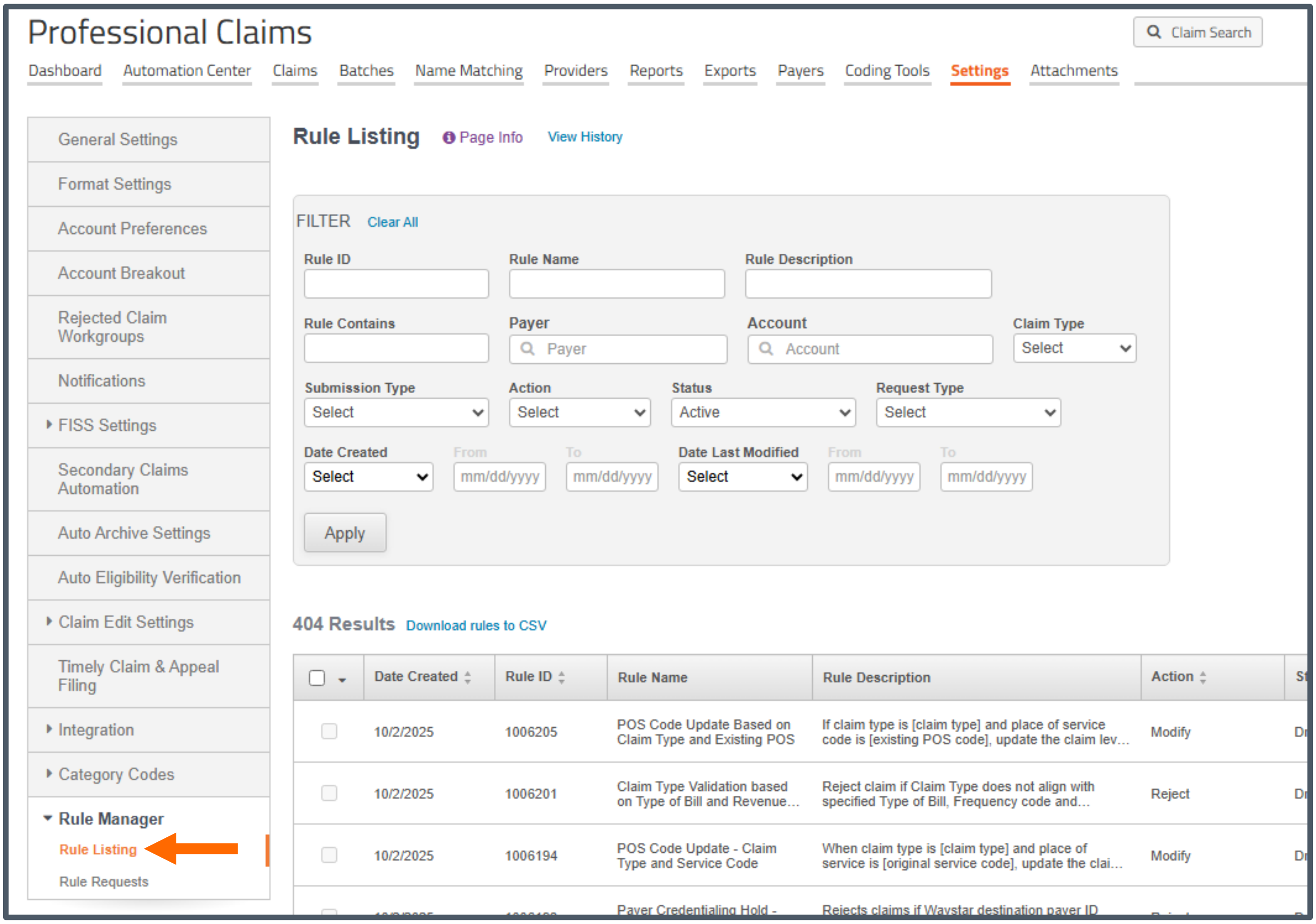
   - The FILTER area at the top of the screen will indicate the information used to narrow the list.
   - Only those rules built with Rule Manager will display on the Rule Listing screen.

   Rule Wizard-Admin: The following Rule Listing screenshot is an example of what a user with the Rule Wizard-Admin permission will see. It includes the **Create New Rule** button for creating a rule, the **Status** dropdown for changing the status of one or more rules at a time, and it also allows the user to **edit an existing rule** (all of which is explained later in this guide).





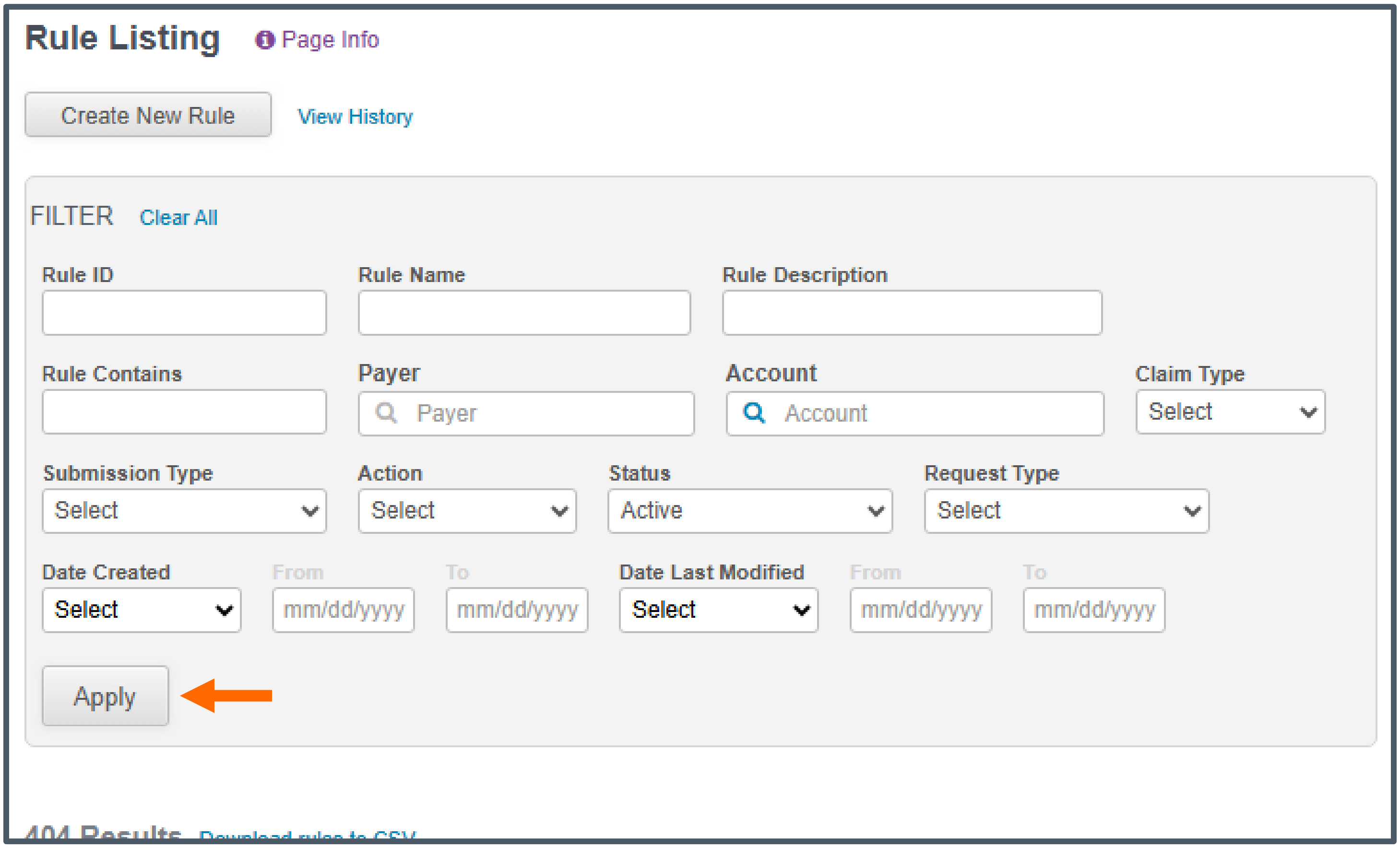
Rule Wizard – View-Only Access: The following Rule Listing screenshot is an example of what a user with the Rule Wizard – View-Only Access permission will see. The View-Only permission does NOT include the Create New Rule button or the Status dropdown (both explained later in this guide) nor does the permission allow the user to edit a rule.



Searching for rules

To search for a specific rule or set of rules:

1. Access the Rule Listing screen.
2. Use the **FILTER** area at the top of the screen to enter rule criteria.



- **Rule ID**: Type the full unique rule ID number that Waystar assigned to the custom rule.
- **Rule Name**: Type part or all of the name you or your organization gave to a custom rule. The filter will return any custom rules in which the entered word or phrase appears in any part of the name.
- **Rule Description**: Enter part or all of the custom rule description you or your organization created as the rule. The filter will return any custom rules in which the entered word or phrase appears in any part of the description.
- **Rule Contains**: Type a procedure code for custom rules that contain that code, but you might not remember the description of the custom rule or if are looking to do an audit of those custom rules.
- **Payer**: Type a **payer name** or **ID**.
- **Account**: Begin typing an **account name** or **ID** and then from the dropdown that will open, select the appropriate account.
- **Claim Type**: From the dropdown, select **Professional**, **Institutional**, or **Both**.
- **Submission Type**: From the dropdown, select **Both**, **Original**, or **Resubmission**.
- **Action**: From the dropdown, select the type of action being performed with the custom rule: **Modify** or **Reject**.

- **Status**: From the dropdown, select a status. The default selection is **Active**, which will return custom rules with a status of **Production**, **Test**, or **Draft**. You can also filter the list using those statuses (**Production**, **Test**, or **Draft**) individually.
- **Request Type**: From the dropdown, return those custom rules that were created as **Manual** or **AI Assisted**.
- **Date Created**: From the dropdown, select a predefined timeframe or select **Custom** and enter a From and To date.
- **Date Last Modified**: From the dropdown, select a predefined timeframe or select **Custom** and enter a From and To date.

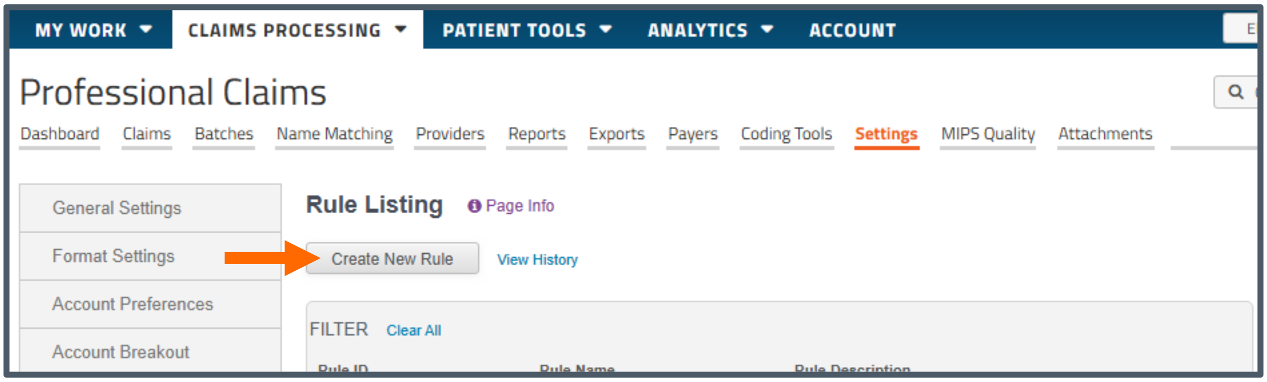
3. When finished entering criteria, click the **Apply** button.

   Search results will appear in the list below the FILTER area.

4. To remove your search criteria, click the **Clear All** link at the top of the **FILTER** area.

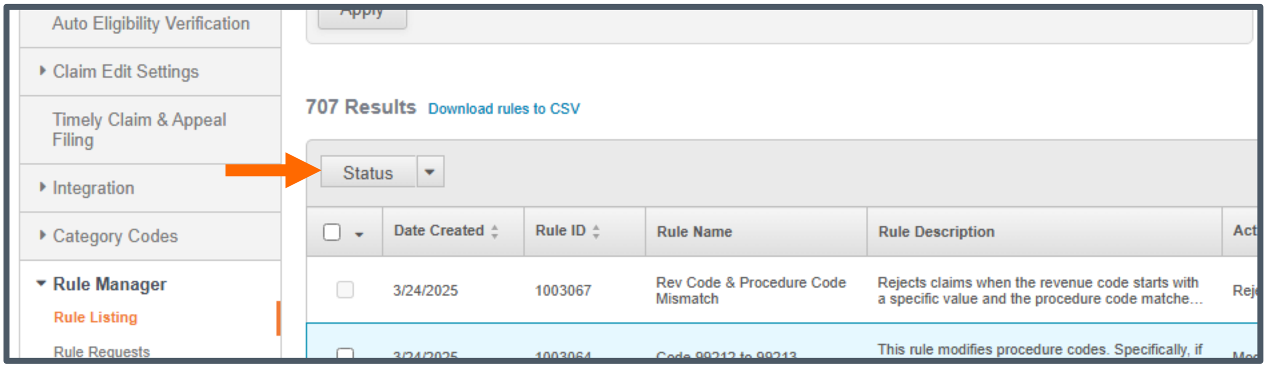
Starting to create a new rule

You can start to create new rules by clicking the **Create New Rule** button at the top of the Rule Listing screen. For details, see the Creating a new rule section.



Working with statuses

You can change the status of rules individually using the action menu or in bulk using the **Status** dropdown above the list of rules. For details, see the Setting the status of rules section in this guide.

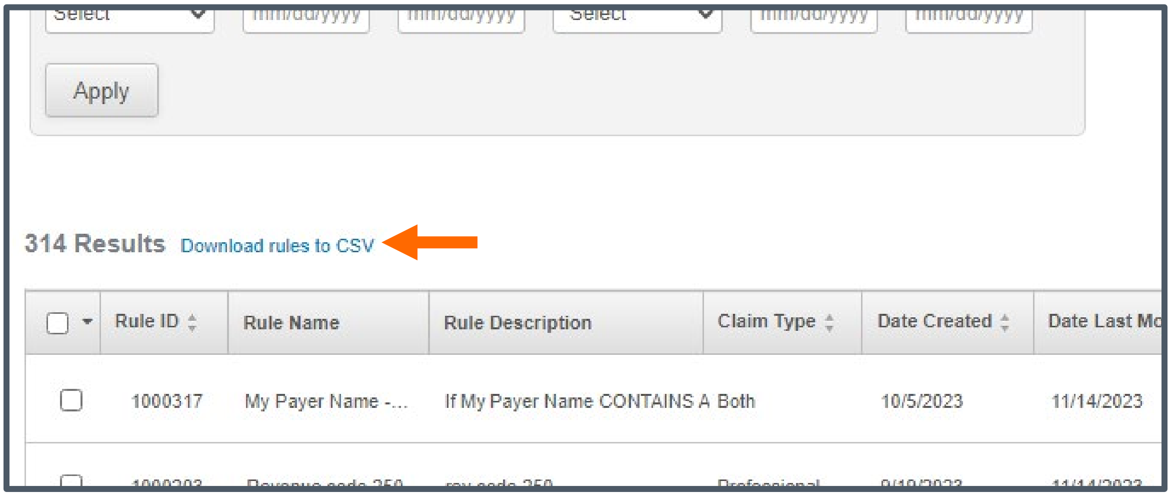


Exporting rules

To export rules that were built in Rule Manager:

1. Access the Rule Listing screen.
2. Click the **Download rules to CSV** link.

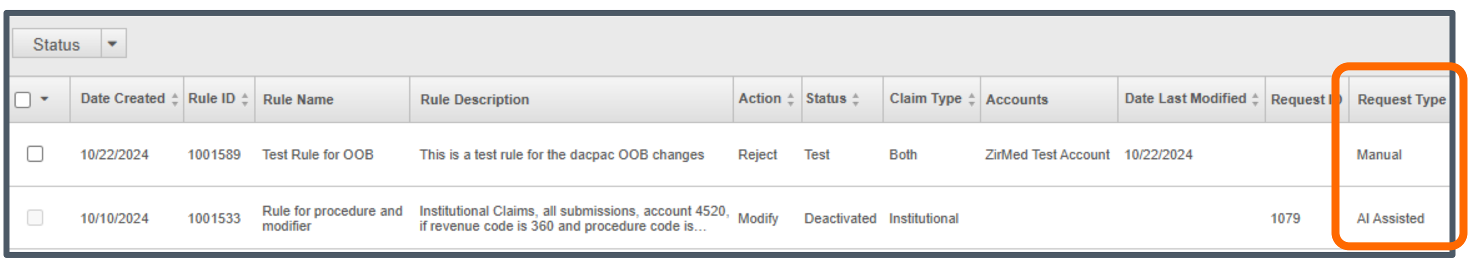
   A message will display in the upper-right corner of the screen when the CSV file is ready. Additionally, you can export rules to a CSV file after the rules are filtered. If rules are filtered and exported to a CSV file, the file will display "filtered" in the name of the file.



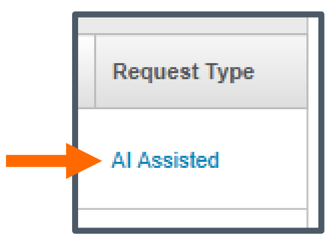
Determining a manually created or AI-assisted rule

To determine if a rule was created manually using Rule Wizard or was AI-assisted using Rule Builder with **Altitude**Assist:

1. Access the Rule Listing screen.
2. View the **Request Type** column, which will display a value of **Manual** or **AI Assisted**.



3. For rules created with **Altitude**Assist, you can click the **AI Assisted** link. This will open the Rule Requests screen.

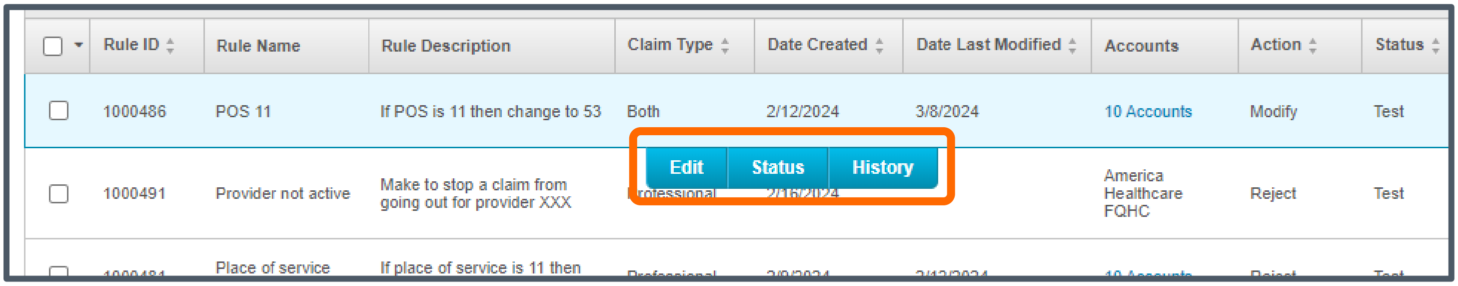


Performing actions on a rule

To perform actions on the rule:

1. Access the Rule Listing screen.
2. Search for rules, locate the appropriate one, and hover over the row.

   The action menu will open. The action menu options that display will depend on the status of the rule (Deactivated, Incomplete, Draft, Test, or Production).



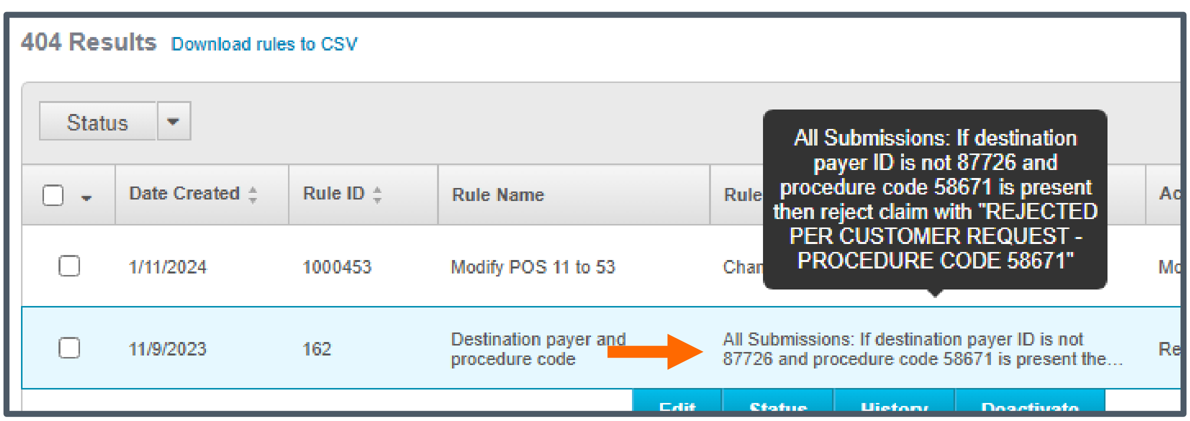
3. Click the appropriate button:
   - **Review**: Will open the Draft Rule screen for that rule, where you can continue working the draft.
   - **Edit**: Will open Rule Wizard for that rule, where you can edit the rule.
   - **Status**: Will open the Status screen for that rule, where you can change the rule's status.
   - **History**: Will open the History screen for that rule.
   - **Deactivate**: Will deactivate the rule, changing the **Status** to **Deactivated**.
   - **Activate**: Will activate the rule and do the following:
     – If the rule was a **Draft** status, the rule will return to **Draft**.
     – If the rule was a **Test** or **Production** status, the rule will return to **Test**.

Viewing the full rule from the Rule Listing screen

To view the full rule from the Rule Listing screen:

1. Access the Rule Listing screen.
2. Search for rules, locate the appropriate one, and hover over the text in the **Rule Description** column.

   A pop-up will open with the full text of the rule. If the entire rule is already visible in the column, the pop-up will not appear.



Creating a new rule

Overview

There are two ways to create a new rule:

- Using Rule Wizard to manually create a new rule using a wizard to assist you.
- Using Rule Builder with the AI-powered **Altitude**Assist.

Using Rule Wizard to manually create a new rule

Starting Rule Wizard

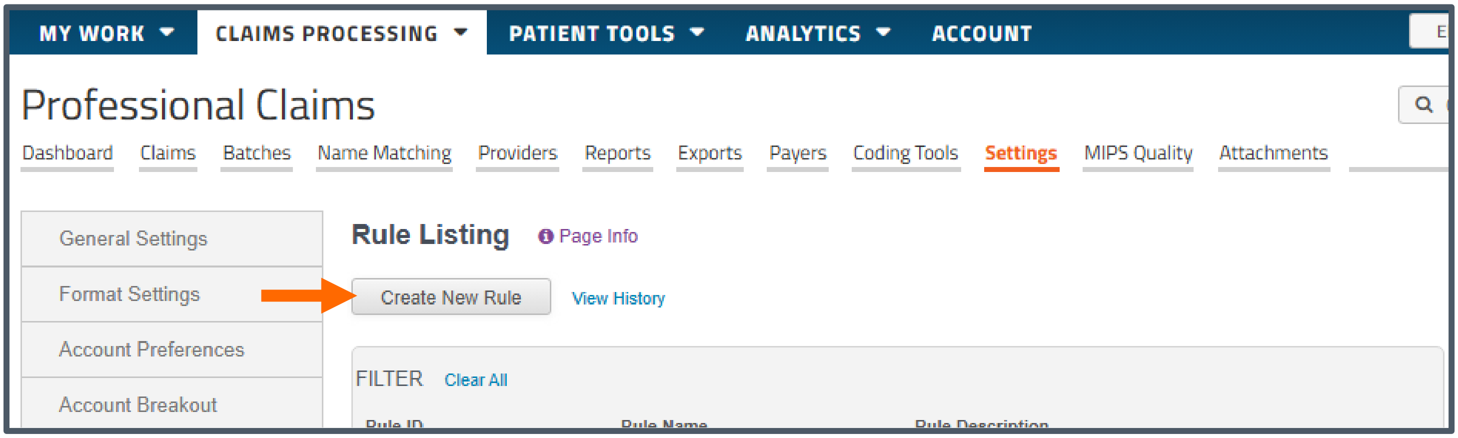
This section explains how to use Rule Wizard to create a rule. The wizard has four tabs that you navigate using either the Back link (when available) or the Continue button, which are at the bottom of the Rule Wizard screens. You can also navigate by clicking the tabs in the ribbon at the top of the builder. Navigating between tabs retains any information you entered on other tabs; however, if you leave Rule Wizard altogether, your information will not be saved unless you confirm and save it via the last tab. After saving a rule, you can then test and/or edit the rule.

To create a new rule:

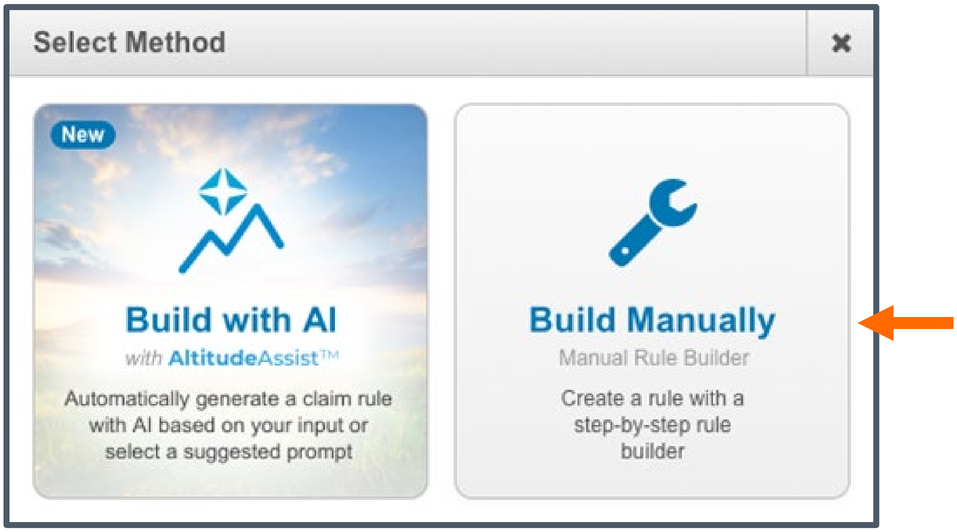
1. Access the Rule Listing screen.

   Note: Users must have a specific permission to create a new rule; see the Granting user permissions for Rule Manager section of this guide.

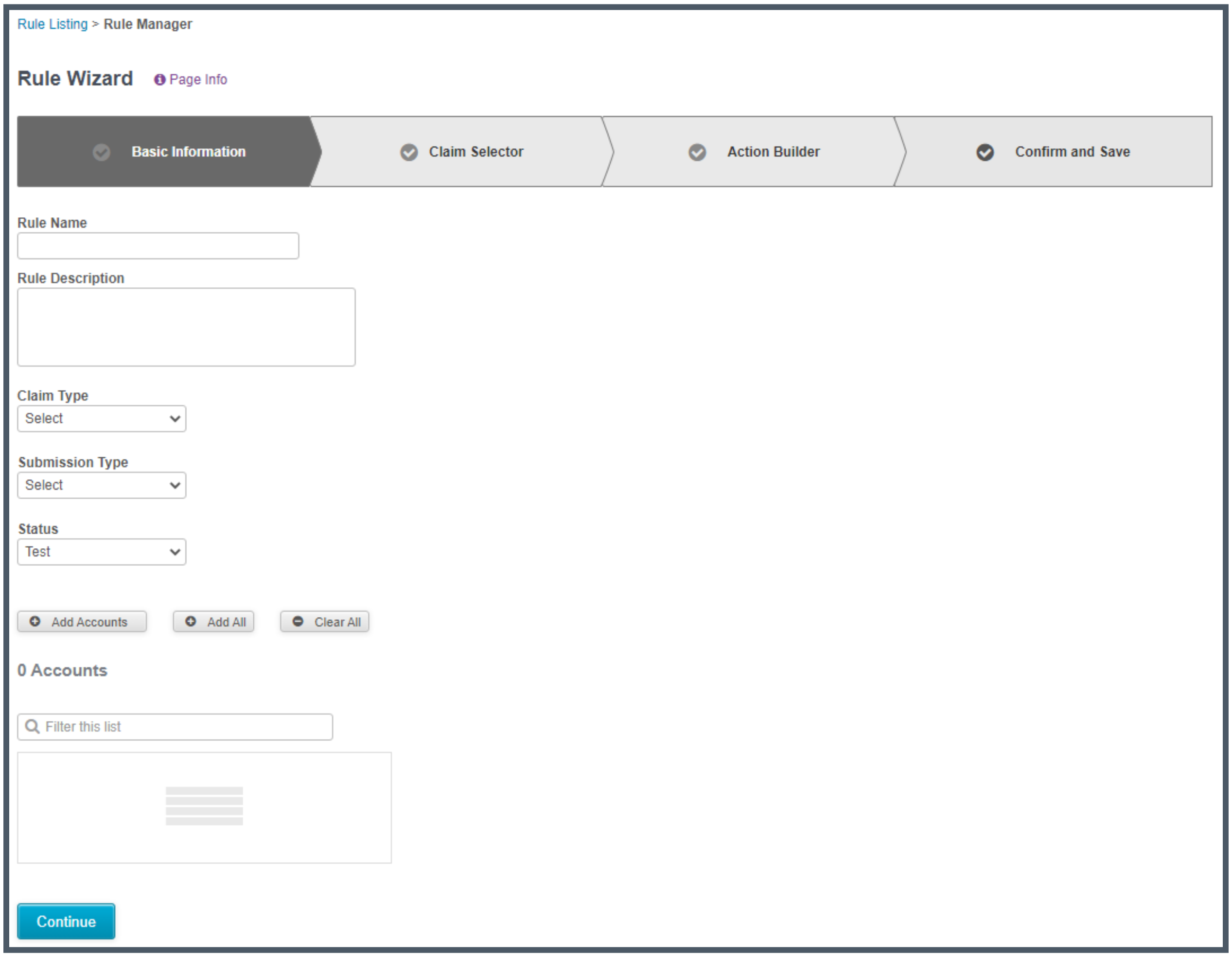
2. From the Rule Listing screen, review the list of existing rules to ensure you are not creating a duplicate rule.
3. Click the **Create New Rule** button at the top of the screen.



4. Click the **Build Manually** button.



Rule Wizard will open to the Basic Information tab.



1. Basic Information tab

Use the Basic Information tab to begin setting up a claims rule.

a. On the Basic Information tab of Rule Wizard, complete the following fields:

- **Rule Name**: Enter a name for the new rule. For example, **Revenue Code 510**.
- **Rule Description**: Enter a brief description of what is expected of the rule. For example:

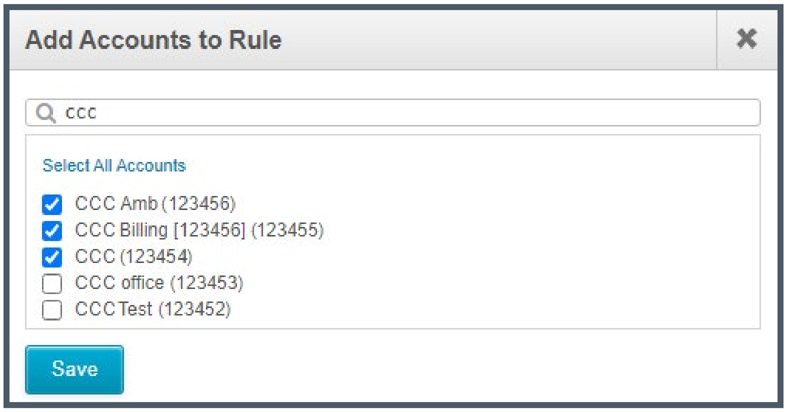
  Institutional Claims. When the revenue code 510 is present on any service line with procedure code 99201 or 99202 or 99203, then change the procedure code to G0463
- **Claim Type**: From the dropdown, select the type of claim the rule should apply to: **Institutional**, **Professional**, or **Both**.
- **Submission Type**: From the dropdown, select the submission type of the claim: **Original**, **Resubmission**, or **Both**.
- **Status**: For new rules, the status is automatically set to **Test**. This will allow you to test the rule before moving it to Production. Additionally, you can deactivate a rule from this dropdown (or reactivate a rule by selecting Test or Production).

  When editing a rule, the status will be the one the rule was set at, so you'll need to set the status to Test so that you can test your edits. For more status information, see the Setting the status of rules section.
- **Accounts**: Select which accounts this rule should apply to:
  – To select all accounts, click the **Add All** button.
  – To clear selected accounts, click the **Clear All** button.
  – To select specific accounts, click the **Add Accounts** button.

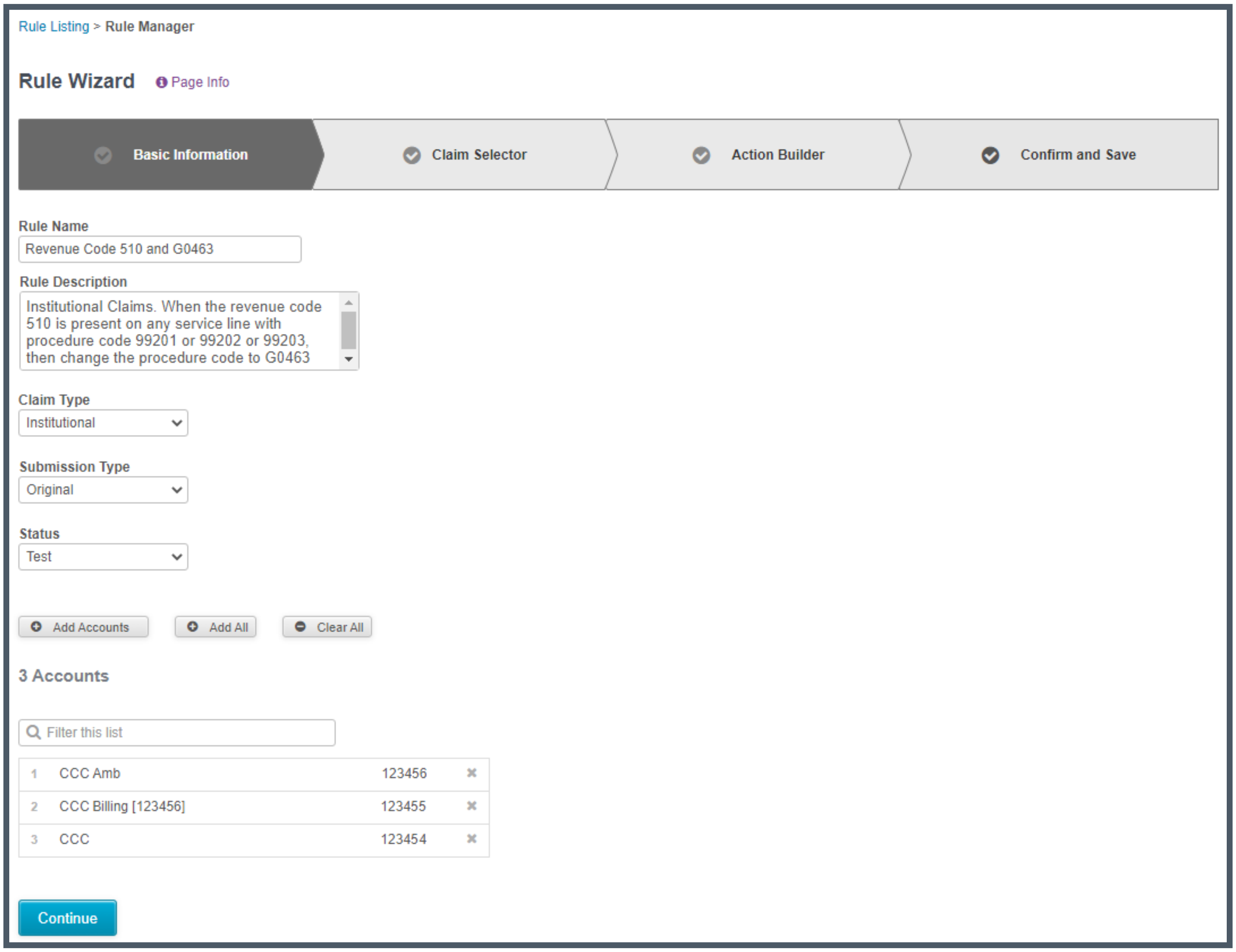
b. From the Add Accounts to Rule screen that will open, search for the accounts you want.

c. Either click the **Select All Accounts** link above the list or click the checkbox next to the appropriate accounts.

d. When finished making your selections, click the **Save** button.

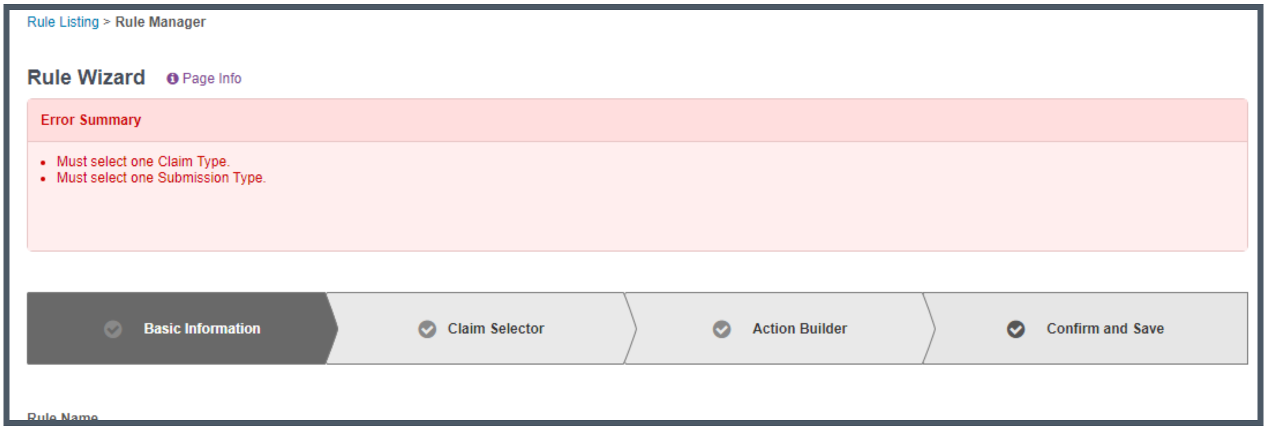


The following shows the Basic Information tab with example data.



e. When finished making your selections, click the **Continue** button at the bottom of the Basic Information tab.

Rule Wizard will validate your entries and if an error is found, it will display an Error Summary at the top of the screen.



After saving your information and if there are no errors, the **Claim Selector** tab will open.

2. Claim Selector tab

Use the Claim Selector tab to add the AND/OR rule statements that qualify a claim to be selected for a rule.

a. On the Claim Selector tab, click the **+ AND statement** link.

   The EDIT RULE area will open.

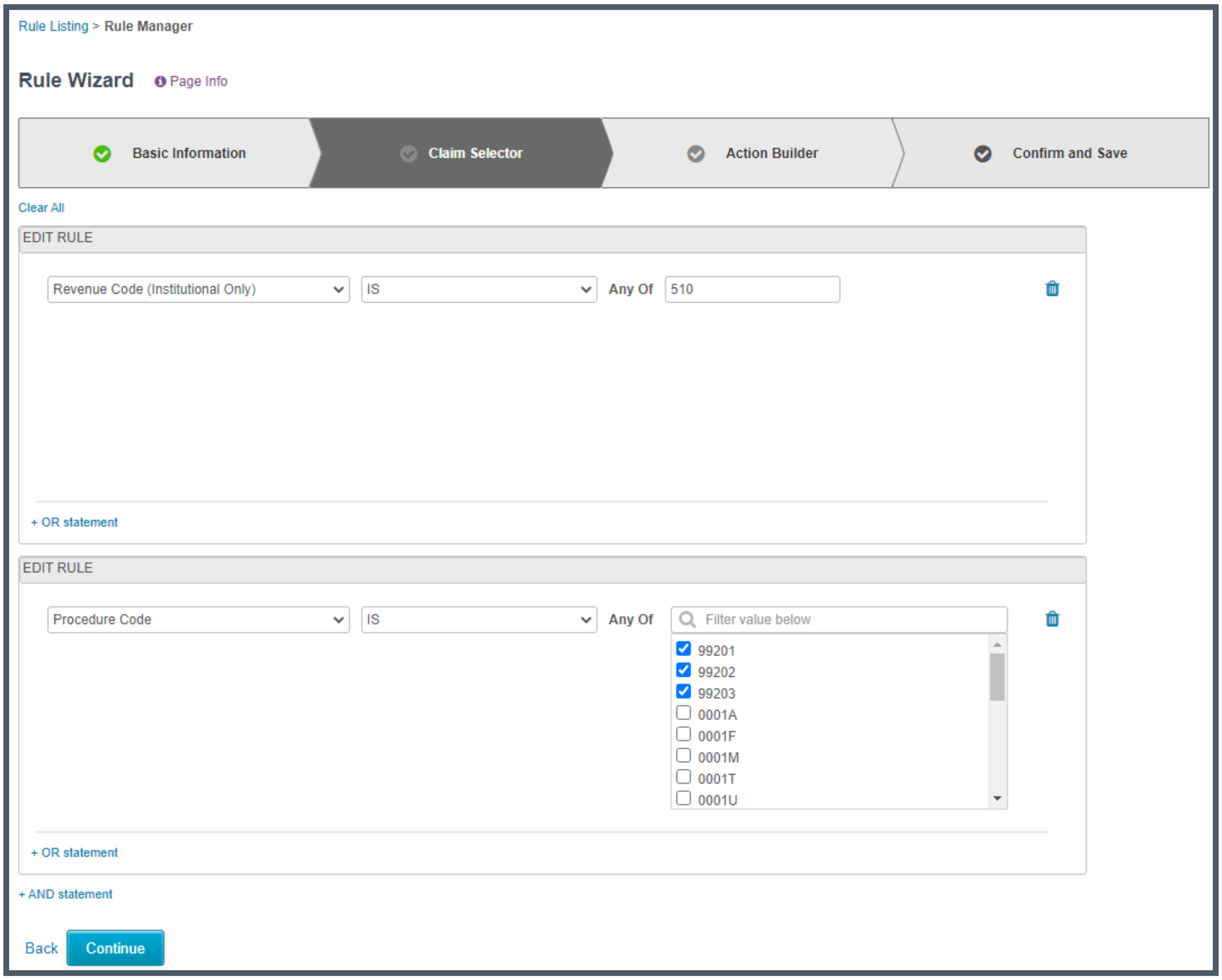
b. From the dropdown, select an appropriate claim element. If you cannot find the element you want to use, then you'll need to request this rule by submitting a Support Case to Waystar.

   Additional fields will open based on your selection.

c. Complete the additional fields, which might be free-text or dropdown selections.

d. As needed, click the **+ OR statement** or **+ AND statement** links to continue adding rule statements.

e. When finished adding AND/OR rule statements, click the **Continue** button at the bottom of the screen.



The Claim Selector Summary screen will open.

f. Review the Claim Selector summary to verify this is the information you want to use to select claims for the rule. In this example:

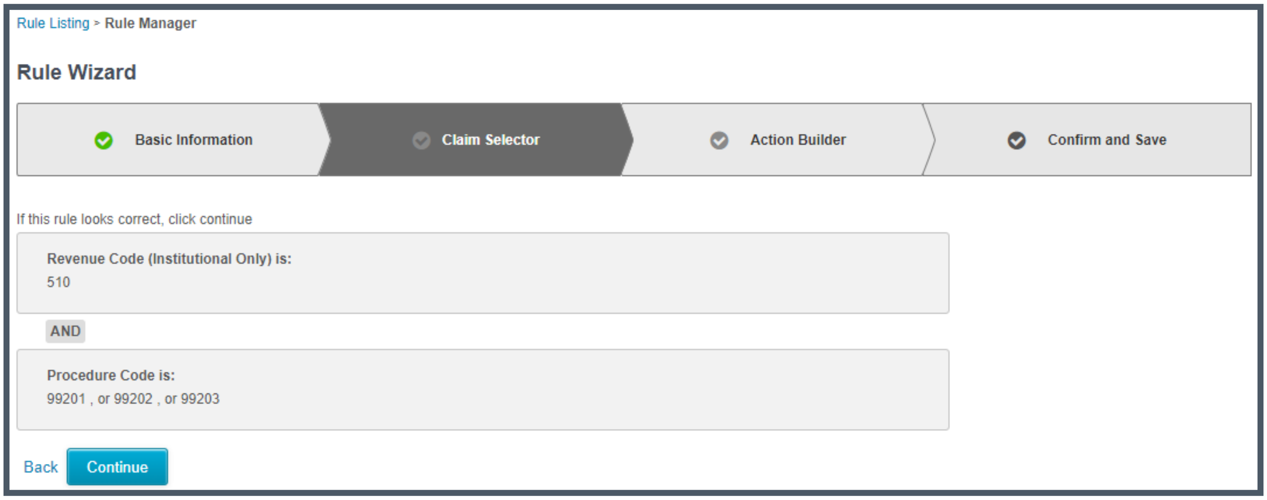
If the claim has a:

- Revenue code of 510

  AND

- A procedure code of 99201, 99202, **OR** 99203

The claim will be selected by this rule for further action.



g. To change this information, click the **Back** link at the bottom of the screen and edit your AND/OR rule statements.

You can also delete any by clicking the trash icon to the right of any AND/OR rule statement.

h. When finished with the AND/OR rule statements, click the **Continue** button from the Summary screen.

Keep in mind the following:

- Rule Wizard will validate your entries and if an error is found, the Error Summary will display at the top of the screen.
- As needed, you can also return to the Basic Information tab by clicking the **Back** button until the screen appears or by clicking the **Basic Information** tab in the ribbon at the top of the screen.
- After saving your information and if there are no errors, the **Action Builder** tab will open.

3. Action Builder tab

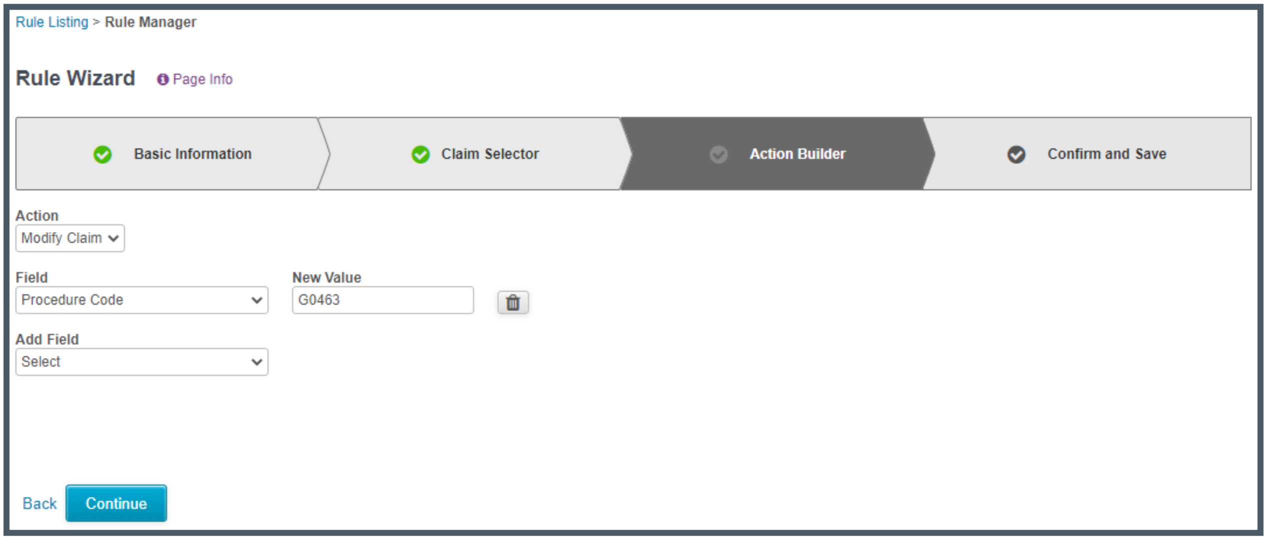
Use the Action Builder tab to select if you want a qualified claim to be rejected or modified.

a. On the Action Builder tab, from the **Action** dropdown, select to **Modify Claim** or **Reject Claim**.

b. If modifying a claim, complete the following:

   1. Add the **Field** you want to modify.
   2. Add the **New Value** for that field.
   3. For additional fields to modify, repeat as necessary.

c. Whether rejecting or modifying a claim, click the **Continue** button.



Keep in mind the following:

- Rule Wizard will validate your entries and if an error is found, the Error Summary will display at the top of the screen.
- As needed, you can also return to previous tabs by clicking the **Back** button until the screen appears or by clicking the specific tab in the ribbon at the top of the screen.
- After saving your information and if there are no errors, the **Confirm and Save** tab will open.

4. Confirm and Save tab

A summary of the rule will display on the Confirm and Save tab.

IMPORTANT: This tab is the final step of Rule Wizard and you must click the **Save** button at the bottom to save the rule; otherwise, if you leave the wizard, your rule will not be saved.

To confirm and save the new rule:

a. Review the rule:

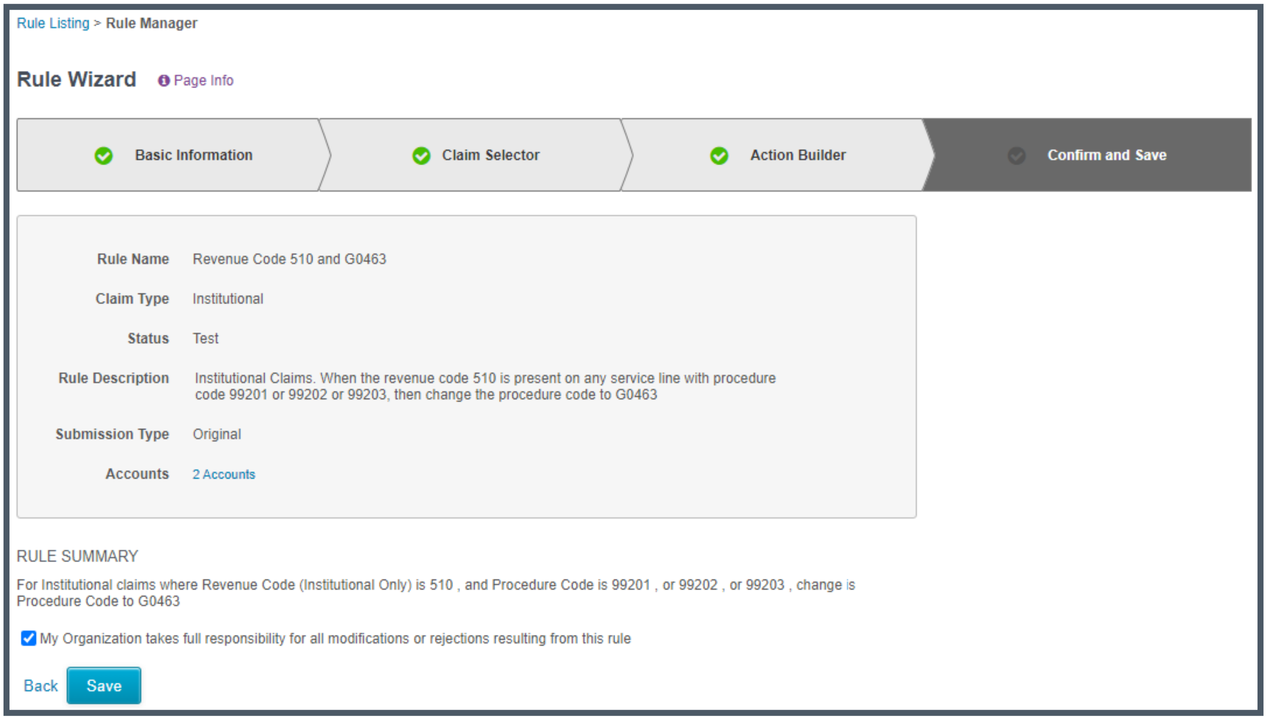
   IMPORTANT: Ensure that the **Status** is set to **Test**, so you can test the rule before moving it to Production.

   - If you need to edit any part of it, you can either click the **Back** link at the bottom of the Rule Wizard screen or you can click the tab in the ribbon at the top of the screen.
   - You can click the Accounts link to review your selected accounts.
   - Read the RULE SUMMARY at the bottom of the screen to ensure the rule looks correct.

b. Select the **My Organization takes full responsibility…** checkbox at the bottom of the screen. If you do not select this checkbox, you cannot save the rule.

c. When finished reviewing the rule (and selecting the “responsibility” checkbox), click the **Save** button.

   Rule Wizard will validate that you selected the checkbox at the bottom; if it’s not selected, the Error Summary will display at the top of the screen.



After saving the rule, the following happens:

- The Rule Listing screen will display a message letting you know the rule was successfully saved.
- A rule ID will be assigned to the new rule.
- The new rule will appear in the list on the Rule Listing screen.

Using Rule Builder with AltitudeAssist to create a new rule

Overview

Waystar's Rule Builder will leverage to respond to user prompts and generate custom rules with a single click to:

- Increase the speed of self-service custom rule creation
- Improve the accuracy of self-service custom rule creation.

Powered by AI, you can use **Altitude**Assist to create customized claim edit rules based on staff input and/or suggested prompts. This will remove the manual task of writing custom rules and will provide a quick and simple way for staff to review, test, and deploy edit rules.

Video tutorial: To view a quick video tutorial of Rule Builder, follow the instructions to create a new rule and from the Rule Builder with **Altitude**Assist screen, click the **Video Tutorial** link below the rule text box.

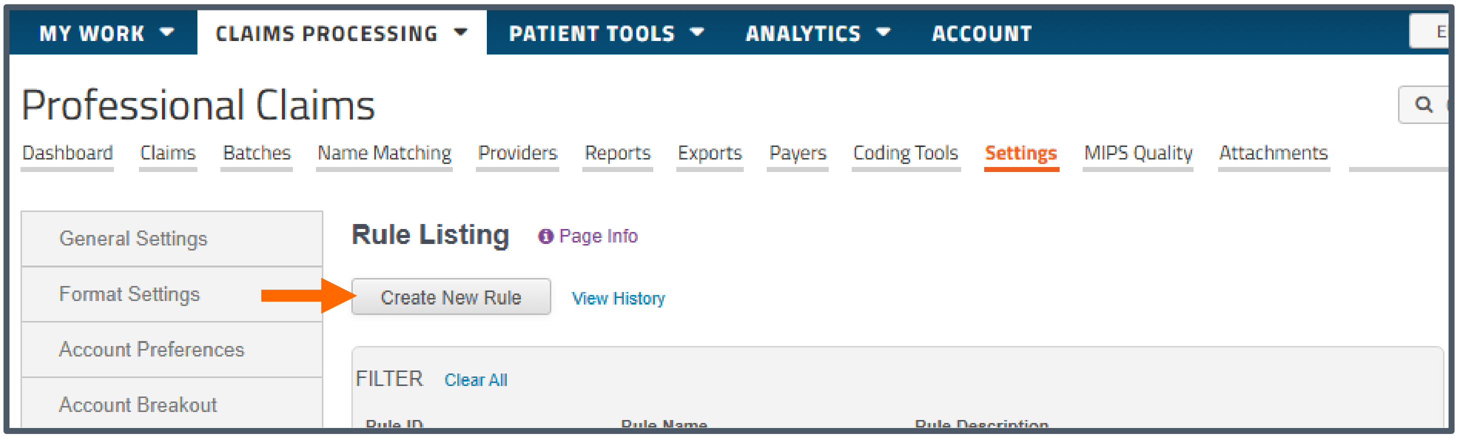
Creating a new rule with a description

To create a new rule with a description:

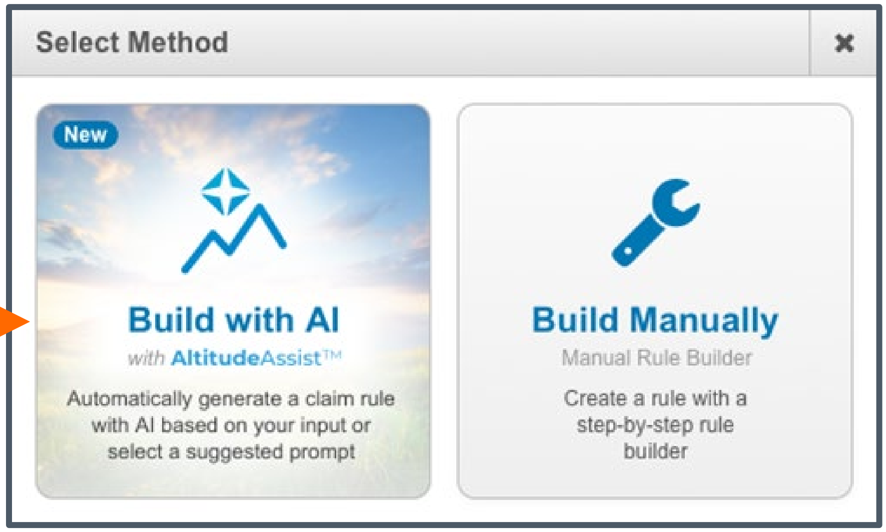
1. Access the Rule Listing screen.

   Note: Users must have a specific permission to create a new rule; see the Granting user permissions for Rule Manager section of this guide.

2. From the Rule Listing screen, review the list of existing rules to ensure you are not creating a duplicate rule.
3. Click the **Create New Rule** button.

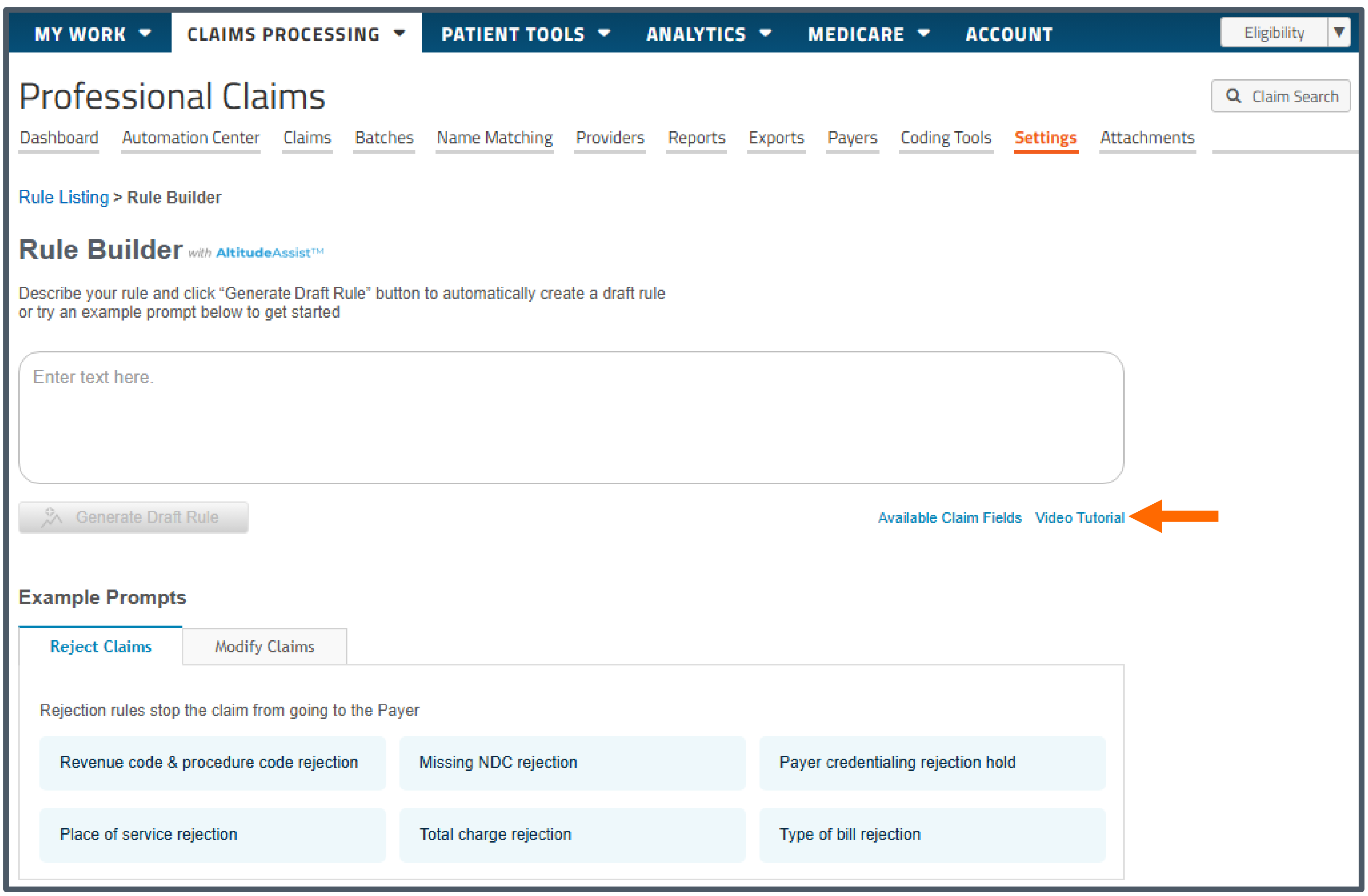


4. Click the **Build with AI** button.



The Rule Builder with **Altitude**Assist screen will open.

5. To view a quick video tutorial of Rule Builder, click the **Video Tutorial** link below the rule text box.



6. Powered by AI, the **Altitude**Assist tool allows you to provide a description in the rule text box. You can either write the description yourself from scratch or use the Example Prompts at the bottom of the screen that, when clicked, will populate the rule text box with a description and highlight values you can specify, such as accounts or claim types.

   Note: If you do not specify the following information within your description, then they will default as described:

   - **Accounts** will default to the account you are logged into.
   - **Claim type** will default to **Both** (Institutional and Professional).
   - **Submission type** will default to **Both** (original and resubmission).

   Keep in mind, you can change any of these defaults on the Draft Rule screen.

7. To view what claim fields are available in Rule Builder with **Altitude**Assist:

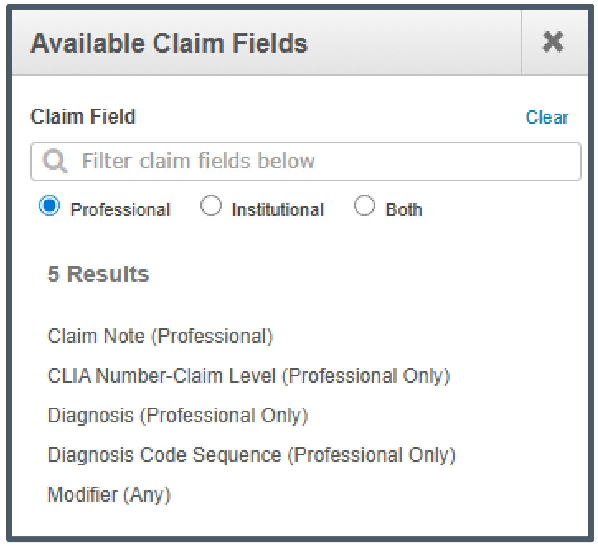
   a. Click the **Available Claim Fields** link below the rule text box.

      The Available Claim Fields screen will open.

   b. Use the **Filter** field to search for claim fields.

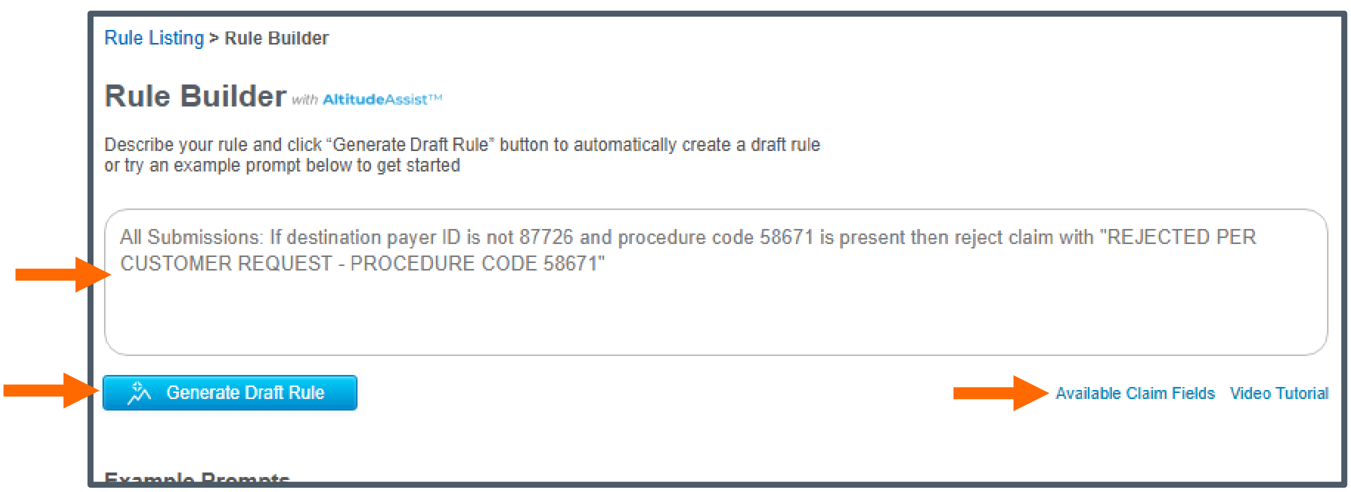
   c. Use the following radio buttons to filter the list of fields:

      - **Professional**: Displays claim fields that are only for Professional claims.
      - **Institutional**: Displays claim fields that are only for Institutional claims.
      - **Both**: Displays all available claim fields, including those that are only for Professional or Institutional claims.



8. When finished entering your description, click the **Generate Draft Rule** button.

   If an error appears on the screen, see the Reviewing error messages section.



9. **Altitude**Assist will evaluate your description and, if no errors occurred, create a draft rule.

   Once the rule processes, the Draft Rule screen will open; for details, see the Editing the draft rule section.

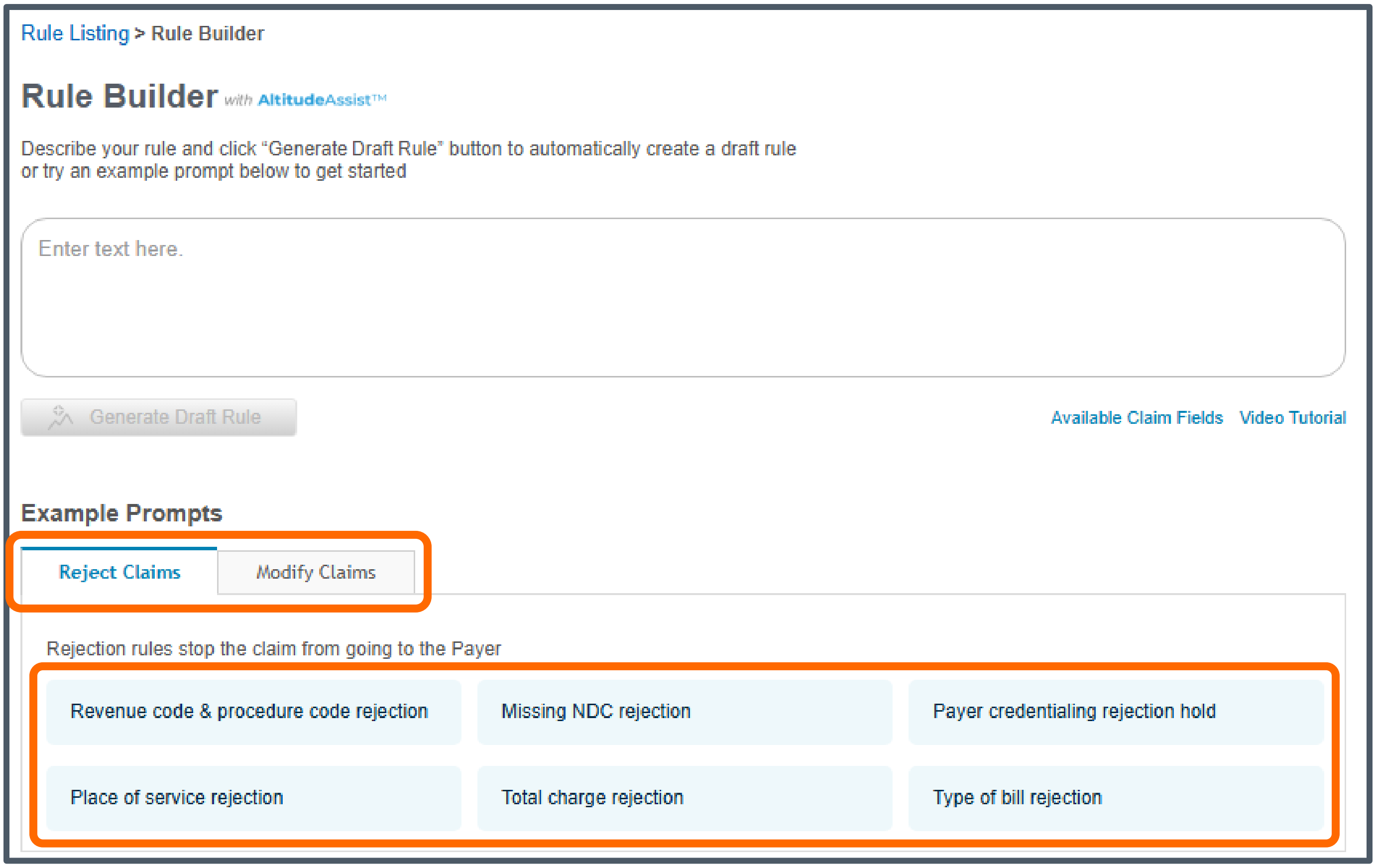
Using Example Prompts to start your description

Example Prompts are available at the bottom of the Rule Builder with **Altitude**Assist screen to assist you in describing the rules you want to create. When you click an Example Prompt, it will populate the rule text box.

For example, if the desired rule includes revenue codes and procedure codes, then from the **Reject Claims** tab, click on the “Revenue code & procedure code rejection” prompt tile. The rule text box will populate with information that you can then edit and add your specific information. If you are building a rule to modify your claim data, then click on the **Modify Claims** tab.

To use Example Prompts:

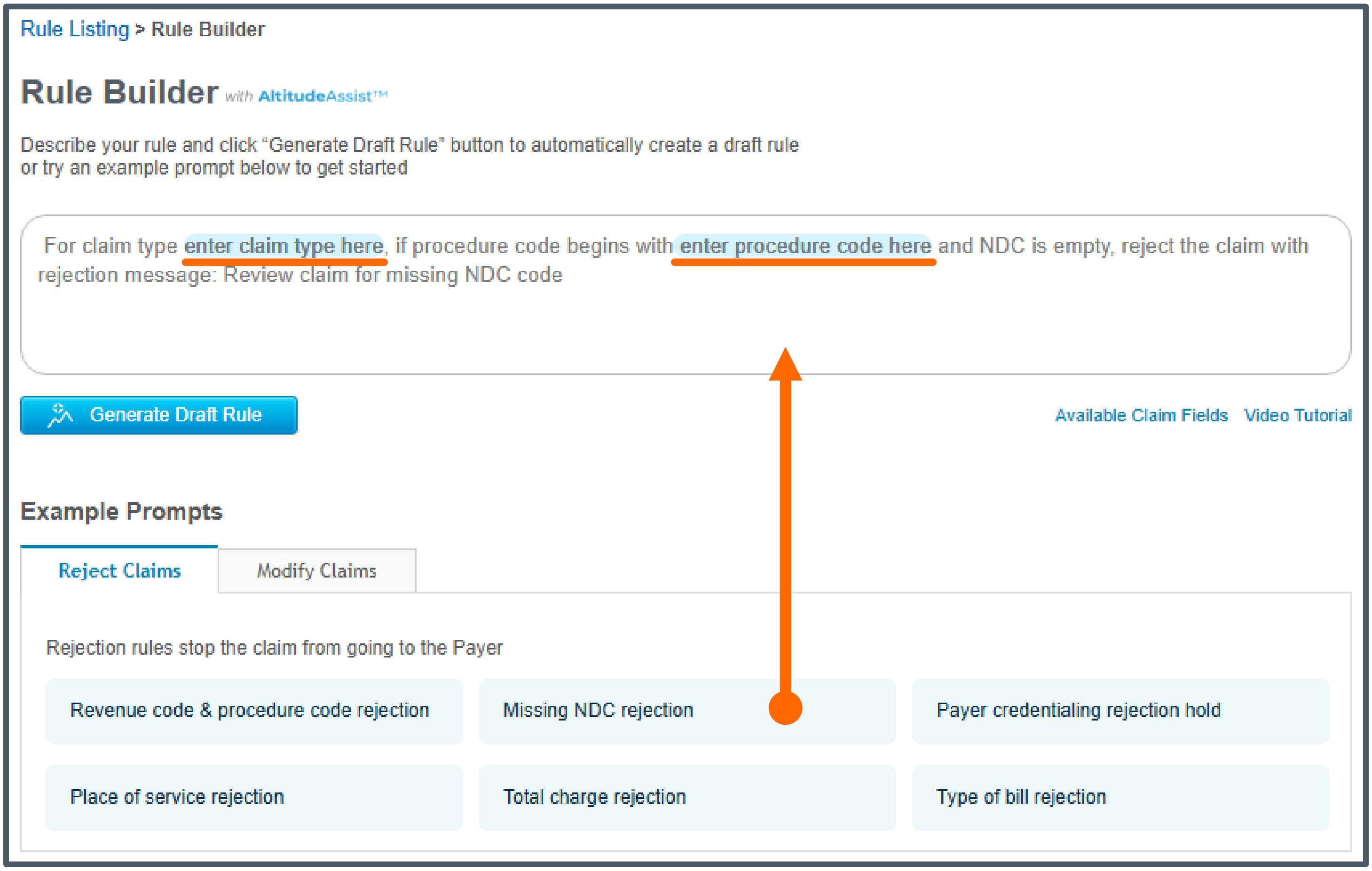
1. Access the Rule Builder with **Altitude**Assist screen as explained in the Creating a new rule with a description section.
2. From the Rule Builder with **Altitude**Assist screen, select the tab that closely describes the rule you want to create: **Reject Claims** or **Modify Claims**.
3. Click the rule example tile you want to start with.



4. Rule Builder, using **Altitude**Assist, will create a description in the rule text box.
5. *Optional*: Replace the blue-highlighted text with specific values.

   Note: If you do not add your own values for the following, then these defaults will be used:

   - **Accounts** will default to the account you are logged into.
   - **Claim type** will default to **Both** (Institutional and Professional).
   - **Submission type** will default to **Both** (original and resubmission).
   - You should enter all other values, such as revenue code or procedure code.



6. When finished editing the description, click the **Generate Claim Rule** button.

   If an error appears on the screen, see the Reviewing error messages section.
7. **Altitude**Assist will evaluate your description and, if no errors occurred, create a draft rule.

   Once the rule processes, the Draft Rule screen will open; for details, see the Editing the draft rule section.

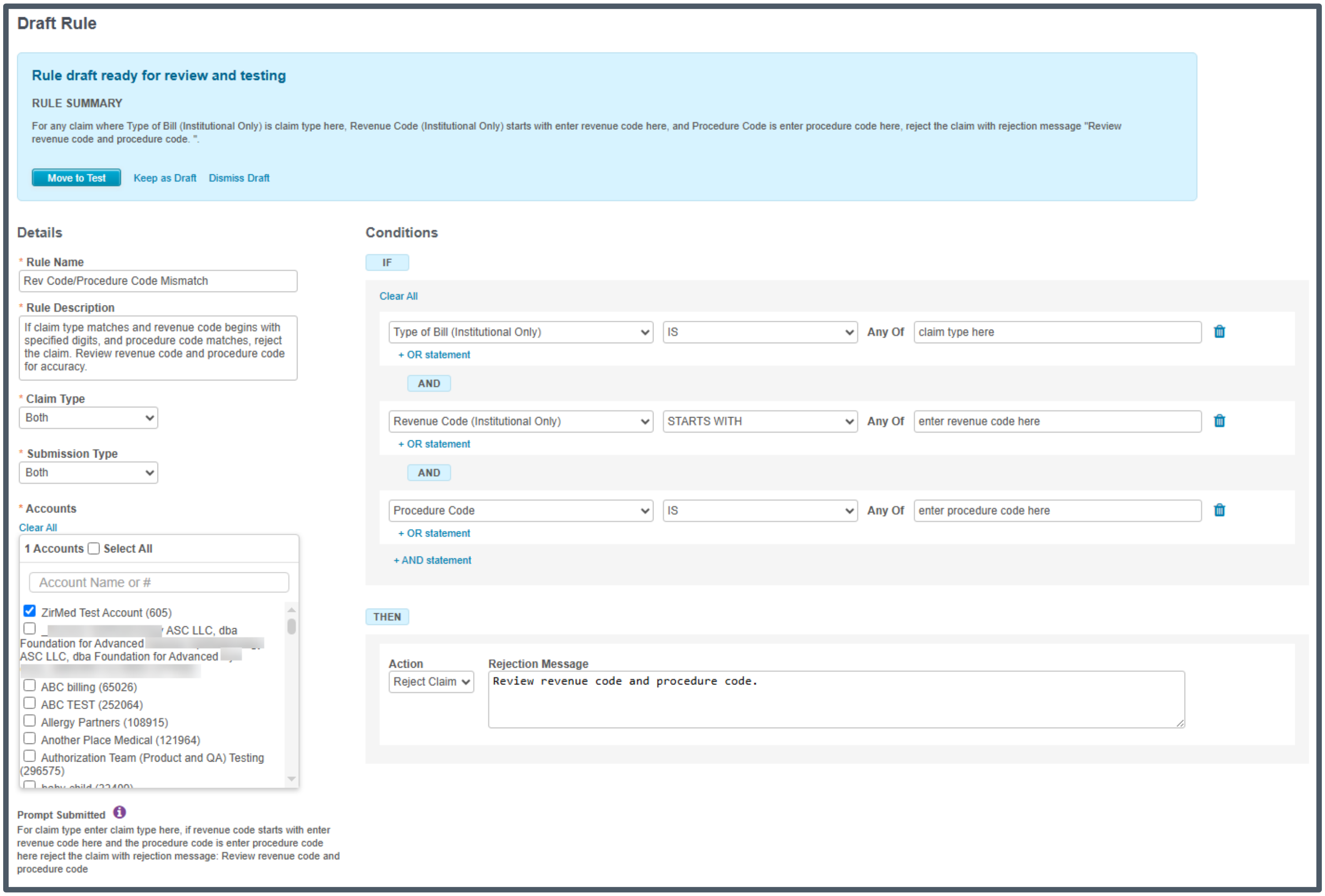
Editing the draft rule

This section explains how to edit the draft rule.

To edit the draft rule:

1. Create a draft of a new rule using either section: Creating a new rule with a description or Using Example Prompts to start your description.
2. After you add your description and click the **Generate Claim Rule** button.

   Once the rule processes, the Draft Rule screen will open.
3. Review the **RULE SUMMARY** at the top of the screen.

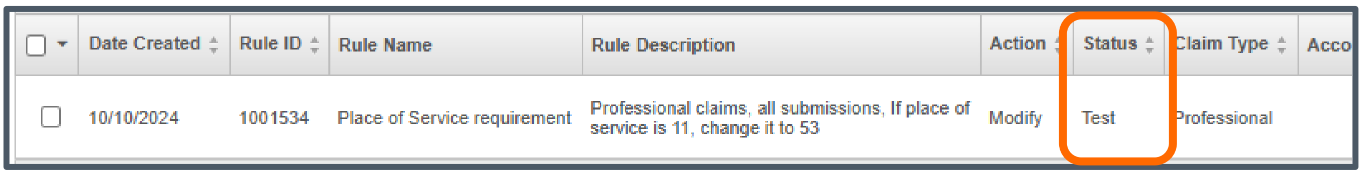


4. If required, make changes to the **Details** and/or **Conditions** fields.
5. Once you are ready to move the rule to the test status, click the **Move to Test** button under the RULE SUMMARY.

   The Accept Responsibility screen will open.
6. To accept responsibility for the changes made to claims from this rule, click the **Accept** button.

7. To view the rule, [access the Rule Listing screen](#).

   The rule will show the **Test** status.



	Date Created	Rule ID	Rule Name	Rule Description	Action	Status	Claim Type	Acco
	10/10/2024	1001534	Place of Service requirement	Professional claims, all submissions, If place of service is 11, change it to 53	Modify	Test	Professional	

Reviewing error messages

If an error occurs after you click the **Generate Claim Rule** button after creating a new rule with a description or using Example Prompts to start your description, an error message will open on the Rule Builder with **Altitude**Assist screen. Errors can occur for reasons such as the connection was disrupted or delayed, there was a server error, or a rule couldn't be built based on the submitted prompt.

Based on the error that occurred, you can either:

- Click the **Manual Rule Builder** link in the error message to create your rule manually.
- Submit a Support case to Waystar and include the Request ID that appears in the error message.

Errors can include:

- Error Code 400

> **Something Went Wrong On Our End**
>
> Please contact Waystar support for assistance and include your Customer ID: 109437 and Request ID: 1049.
> You may also use the Manual Rule Builder to create your rule.

- Error Code 404

> **Page Not Found**
>
> Please contact Waystar support for assistance and include your Customer ID: 109437 and Request ID: 1049.
> You may also use the Manual Rule Builder to create your rule.

- Error Code 500

> **Server Error**
>
> We couldn't create a rule. Try again later or use the Manual Rule Builder to create your rule.

- Error Code 503

> **Server Error**
>
> We couldn't create a rule. Try again later or use the Manual Rule Builder to create your rule.

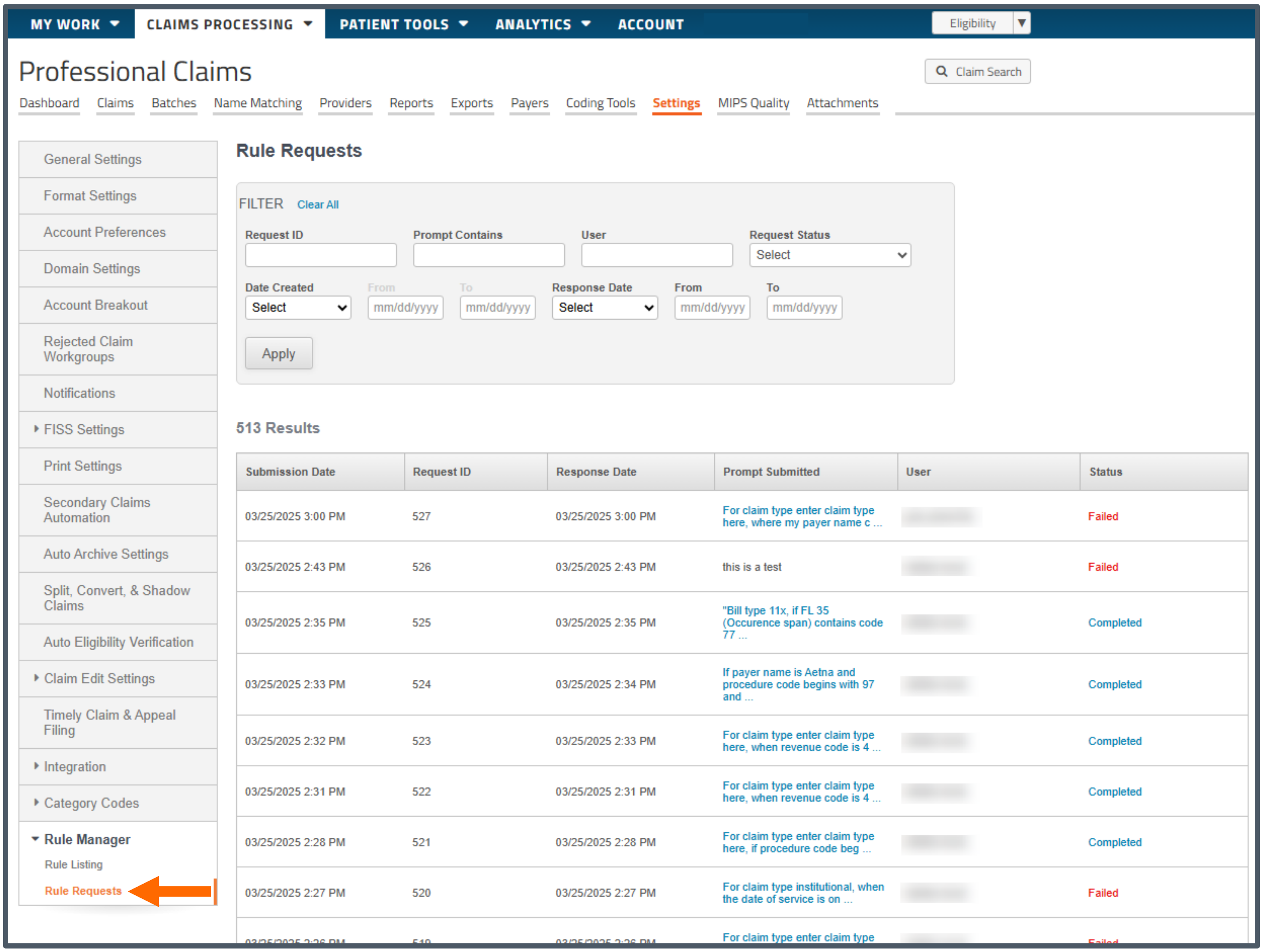
Reviewing submitted Rule Requests

This section explains how to use the Rule Requests screen to review any submitted rules.

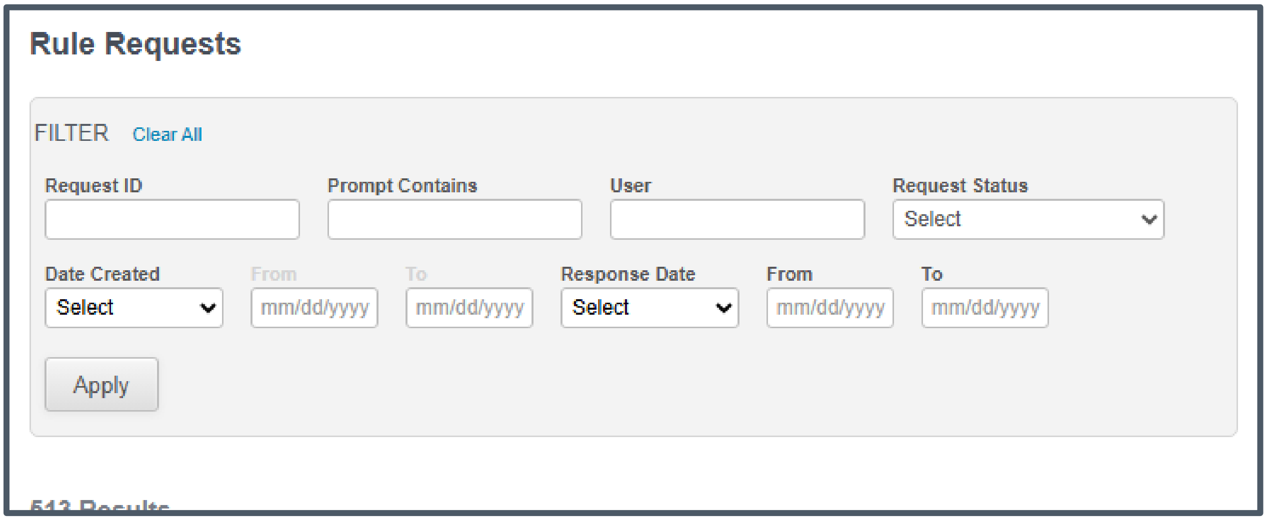
To review submitted rules:

1. Go to **CLAIMS PROCESSING** > **Professional Claims** or **Institutional Claims** > **Settings** > **Rule Manager** > **Rule Requests**.

   The Rule Requests screen will open and display any submitted rule requests.



2. To filter the number of rule requests:
    a. Use the **FILTER** area at the top of the screen to enter rule criteria.



    b. When finished entering criteria, click the **Appl**y button.

    The list below the FILTER area will update based on your criteria.

3. Review rule requests in the list below the FILTER area. The **Status** column will display either **Failed** or **Completed**.
4. From rule requests with a Completed status, you can click the status to open the Rule Listing screen and display that rule.
    - **Failed**: Hover over the **Failed** text to display the error message.
    - **Completed**: Click the **Completed** link, which will open the Rule Listing screen and display that rule.

Editing an existing rule

You can edit an existing rule but be sure to test it thoroughly before moving it to Production.

To edit an existing rule:

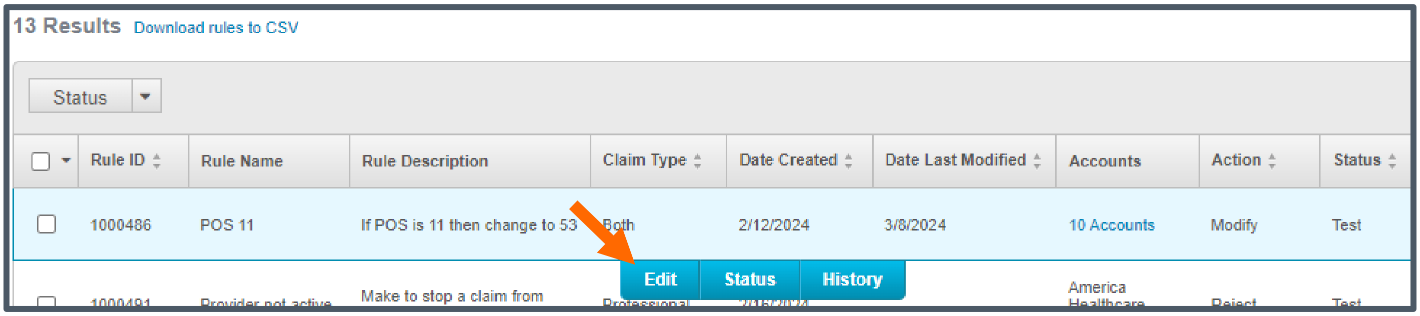
1. Access the Rule Listing screen and search for a rule.

   Note: Users must have a specific permission to edit a rule; see the Granting user permissions for Rule Manager section of this guide.

2. After locating the appropriate rule (must have a status of **Test** or **Production**), hover your cursor over the row.

   The action menu will open below the row.

3. Click the **Edit** button.

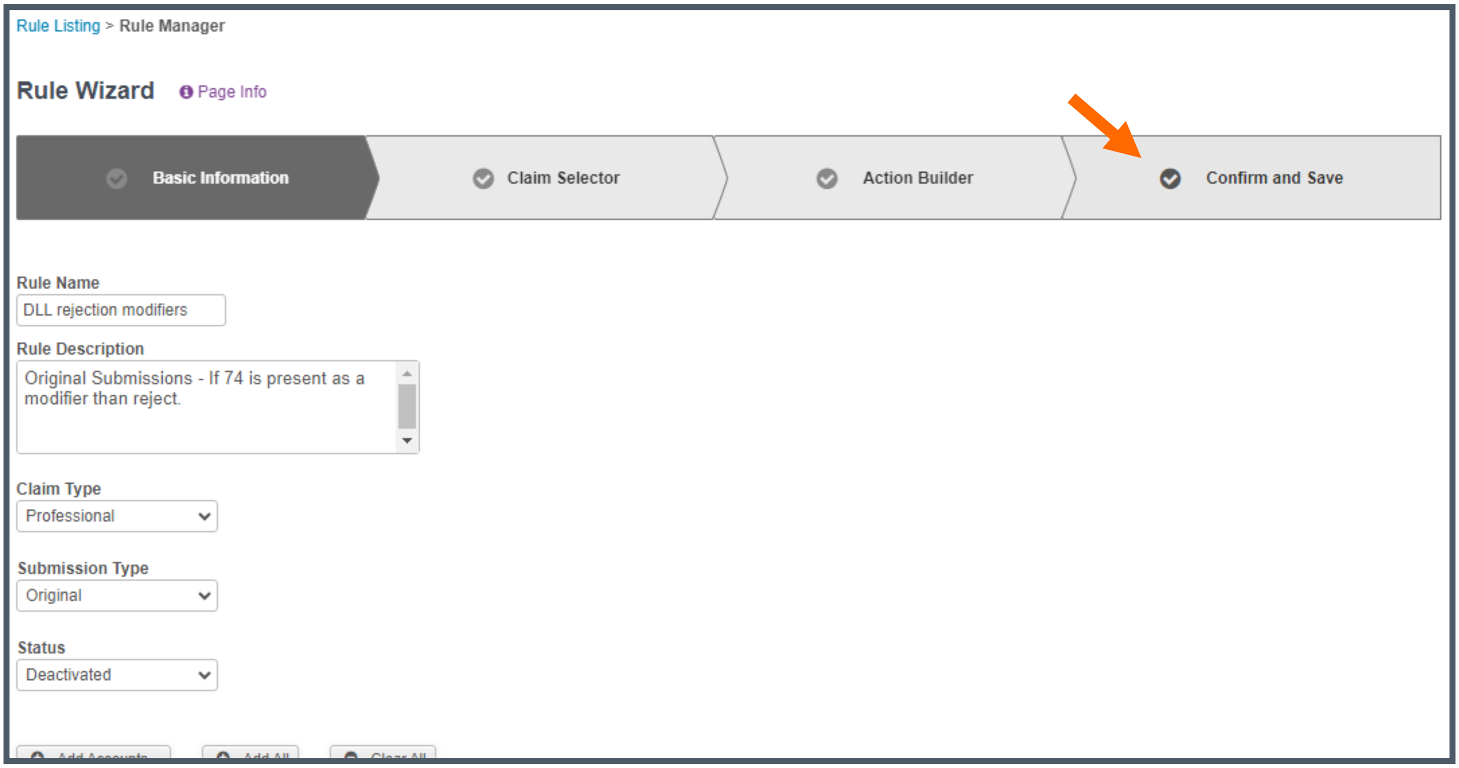


   The Rule Wizard will open with fields populated for the selected rule.

4. Navigate to the appropriate tabs and edit as necessary. See the tab information in the Using Rule Wizard to manually create a new rule section for details.

   Note: To deactivate a rule, go to the Basic Information tab and from the **Status** dropdown, select **Deactivated** (to reactivate the rule, select Test or Production).

5. When finished making your edits, click the **Confirm and Save** tab.



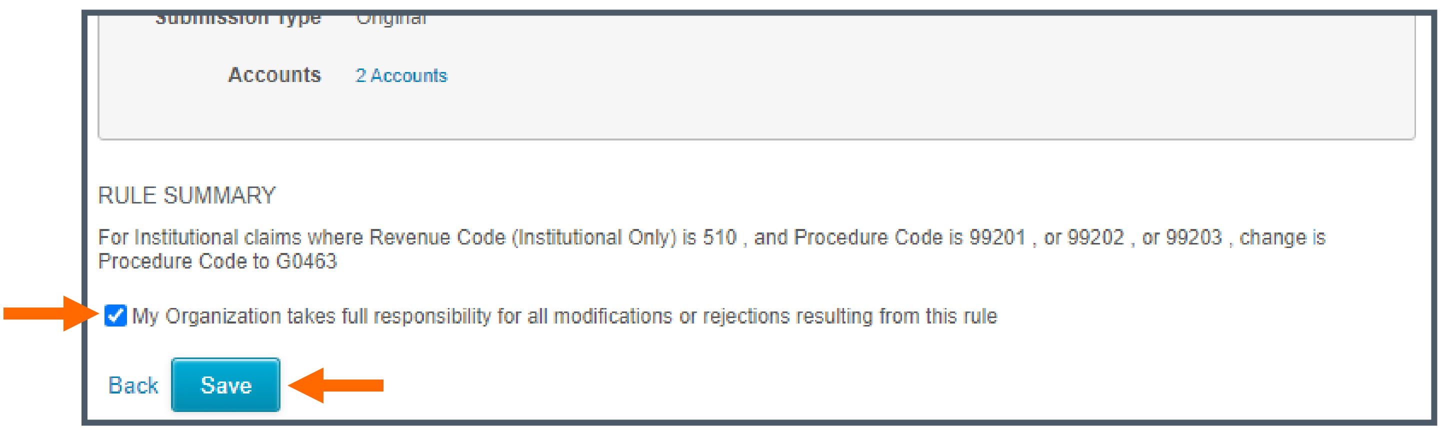
The tab will display a summary of the rule, including your edit(s).

6. Review the rule (see the Confirm and Save tab section for details).

   IMPORTANT: Ensure that the **Status** is set to **Test**, so you can test the rule edit(s) before moving it to Production.

7. Select the **My Organization takes full responsibility…** checkbox at the bottom of the screen. If you do not select this checkbox, you cannot save the rule.

8. When finished reviewing the rule (and selecting the "responsibility" checkbox), click the **Save** button.



After saving the rule, the Rule Listing screen will display a message letting you know the rule was successfully saved.

Setting the status of rules

This section explains how to set the status of one or more rules from the Rule Listing screen.

Setting an individual status

IMPORTANT: If setting the rule to Production, be sure you have thoroughly tested the rule.

To set an individual status:

1. Access the Rule Listing screen and search for a rule.

   Note: Users must have a specific permission to edit a rule; see the Granting user permissions for Rule Manager section of this guide.

2. After locating the appropriate rule, hover your cursor over the row.

   The action menu will open below the row.

   Note: The Status button will only appear for rules with a status of **Test** or **Production**.

3. Click the **Status** button.

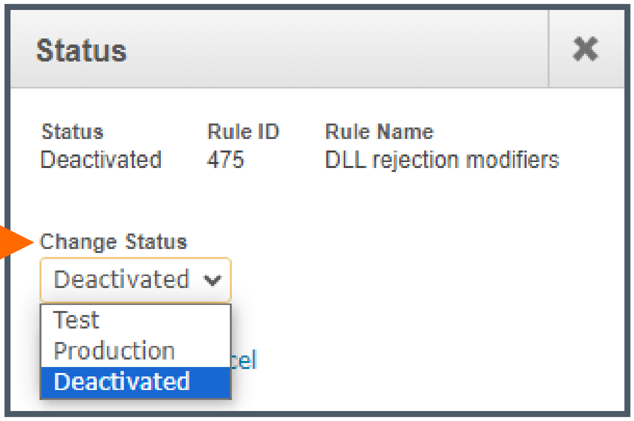
   The Status screen will open.

   IMPORTANT: Before setting a rule to Production in the next step, be sure to review the Moving a rule to Production section.

4. From the **Change Status** dropdown, select the appropriate status.

5. When finished making your selection, click the **Save** button.

   - The Rule Listing screen will display a message letting you know the rule was successfully saved.
   - It takes approximately 10 minutes for the rule to be available in your Production environment.



Setting multiple statuses

This section explains how to select multiple rules and set the status for all rules that you selected.

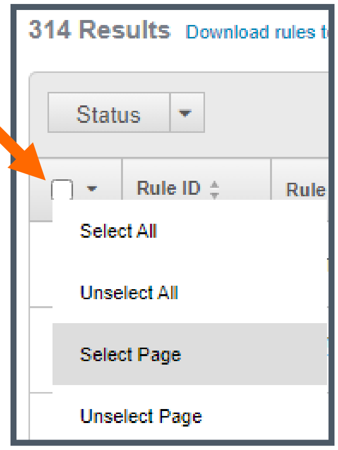
To set multiple statuses:

1. Access the Rule Listing screen and search for a rule.

   Note: Users must have a specific permission to edit a rule; see the Granting user permissions for Rule Manager section of this guide.

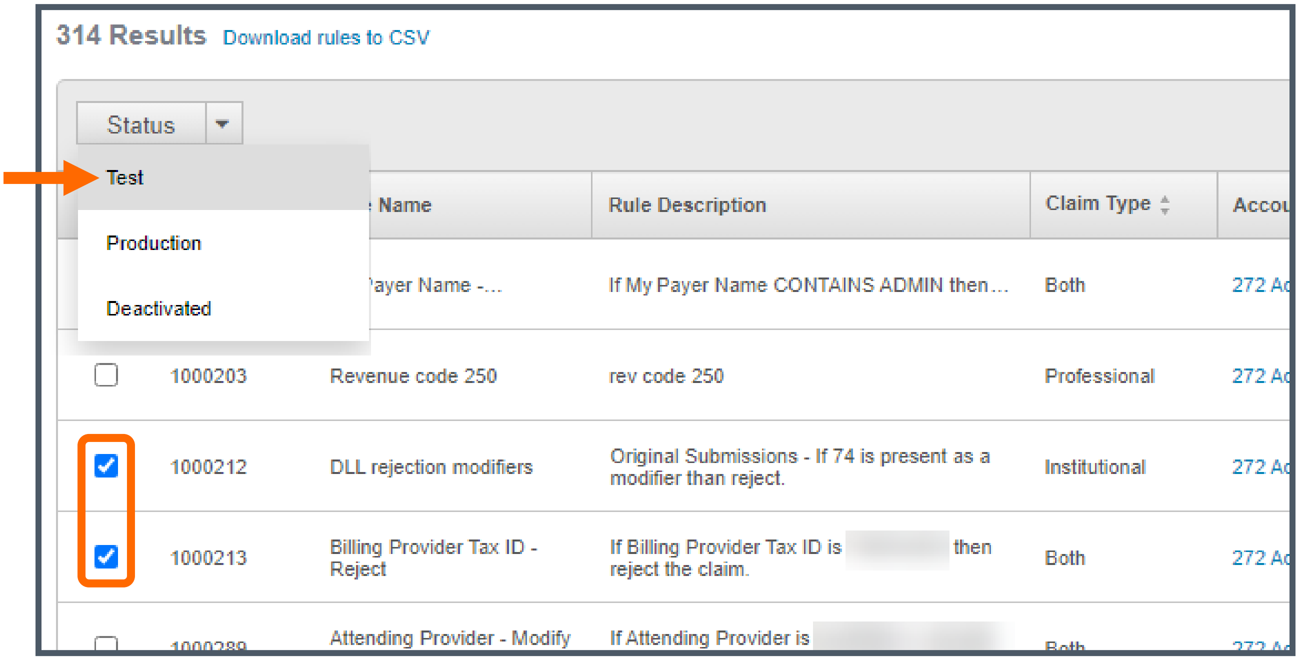
2. For rules with a status of **Test** or **Production**, select the checkbox(es) to the left of the appropriate rule(s).

   You can also click the checkbox in the list header to select/deselect all rules on that page or use the dropdown to the right of the header checkbox to select/deselect all rules or those rules on the current page of the list.



   IMPORTANT: Before setting a rule to **Production**, be sure to review the Moving a rule to Production section.

3. From the **Status** dropdown, select the status: **Test**, **Production**, or **Deactivated**.



   When finished making your selection:

   - The Rule Listing screen will display a message letting you know the rule was successfully saved.
   - It takes approximately 10 minutes for the rule to be available in your Production environment.

Testing a rule

This section explains how to test a claim rule before moving the rule into your Production environment.

To test a rule:

1. After you create a rule, go into your Test environment, and upload a batch of claims.
   - The claims you upload will need to meet the claim criteria of the rule you just created to ensure that the rule processes as expected.
   - Test claims will appear in the Test environment; however, to view Rule Manager, leave the Test environment because only the test claims will appear there.
2. As needed:
   - Modify your claims data within the test file to allow a claim to “qualify” for a rule to run against it.

     For example, if a rule is written that requires the claim to have a revenue code of 360 and a procedure code of 10021, then make sure your test file contains a claim with these data element values.
   - Edit the rule based on your findings.
3. After you thoroughly test your new rule, move the rule from Test to Production.

   The rule will be live in your Production environment within minutes.

Moving a rule to Production

This section explains how to move a rule to Production.

IMPORTANT: Be sure you have thoroughly tested the rule before you move it to Production.

To move a rule to Production:

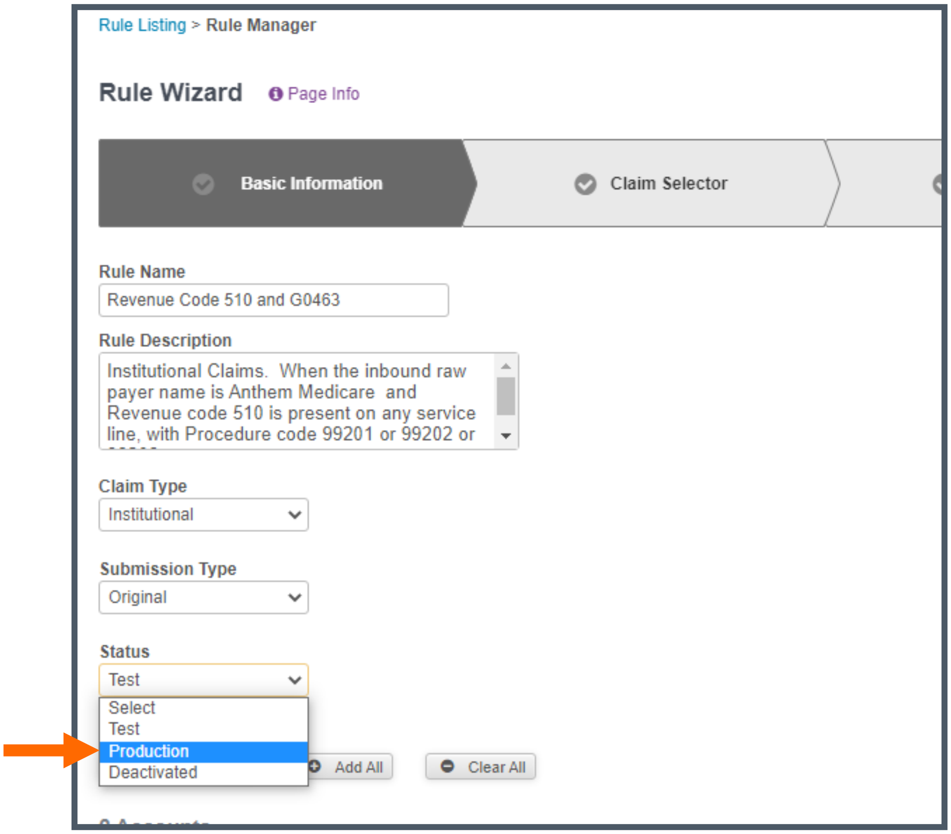
1. Access the Rule Listing screen and search for a rule.

   Note: Users must have a specific permission to move a rule to Production; see the Granting user permissions for Rule Manager section of this guide.

2. After locating the appropriate rule, click the **Edit Rule** link on the right side.

   Rule Wizard will open with fields populated for the selected rule.

3. On the Basic Information tab, from the **Status** dropdown, click **Production**.



4. Click the **Confirm and Save** tab.
5. Perform one final review of the rule.
6. Select the **My Organization takes full responsibility…** checkbox at the bottom of the screen. If you do not select this checkbox, you cannot save the rule.
7. Click the **Save** button.

   After saving the rule:

   - The Rule Listing screen will display a message letting you know the rule was successfully saved.
   - It takes approximately 10 minutes for the rule to be available in your Production environment.

Viewing the history of rules

This section explains how to view the history of a rule from the Rule Listing screen.

Viewing the history of an individual rule

The Rule History screen assists in understanding any changes that have occurred to an existing rule.

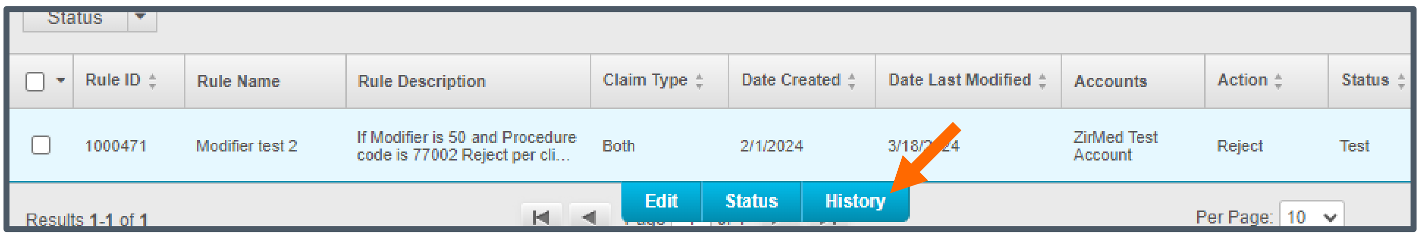
To view the history of a rule:

1. Access the Rule Listing screen and search for a rule.

   Note: Users must have a specific permission to edit a rule; see the Granting user permissions for Rule Manager section of this guide.

2. After locating the appropriate rule, hover your cursor over the row.

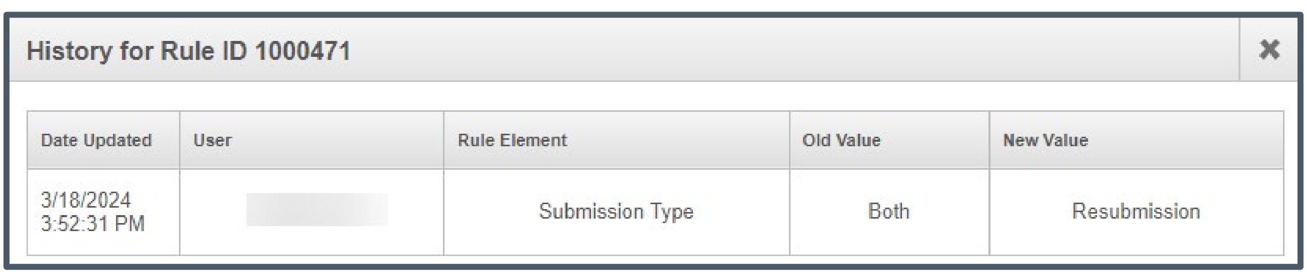
   The action menu will open below the row.



3. Select the **History** button.

   The History for Rule screen will open. Changes are listed in order of newest to oldest.

   - When a rule value is updated, you will see the following:
     - The date the rule was updated.
     - The user who completed the update.
     - The element of the rule that was updated.
     - The old value of the rule element before the change.
     - The updated value of the element after the change.

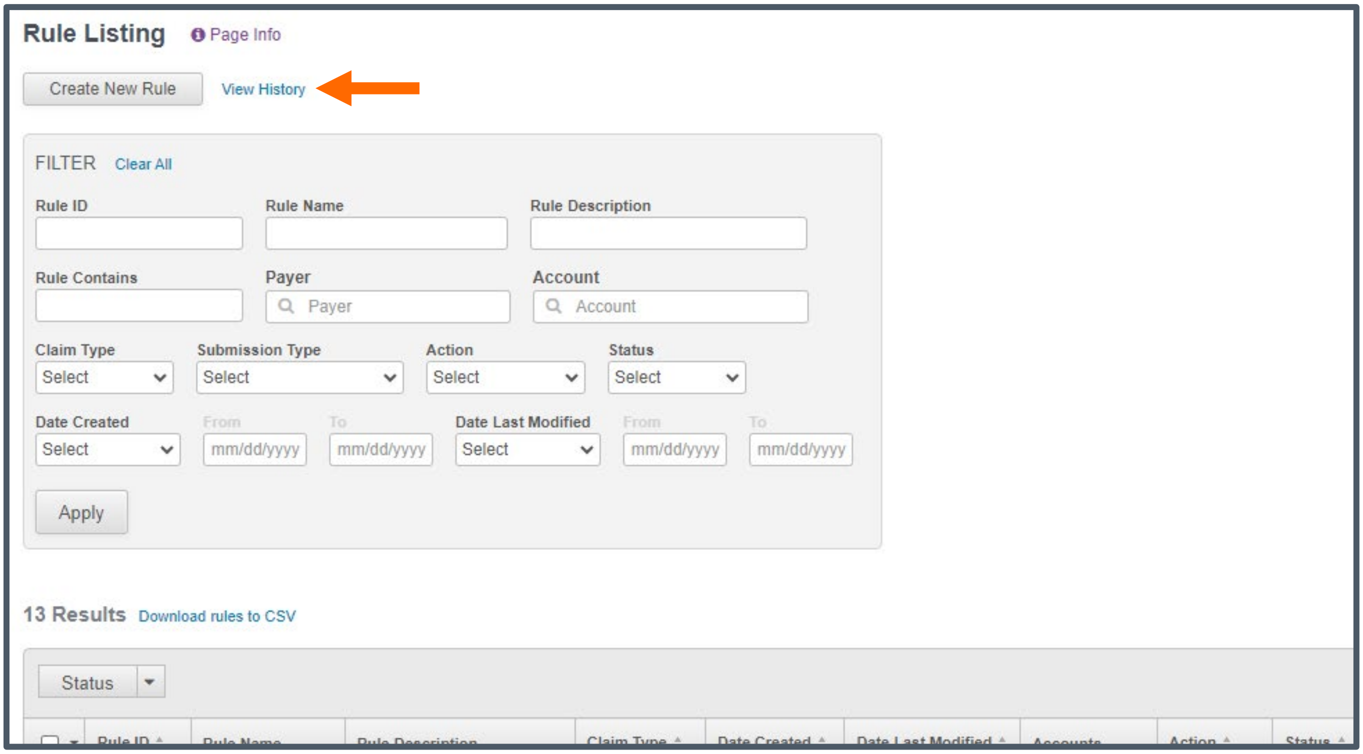


   - When a rule is moved from one account to another, you will see the old and new accounts listed.

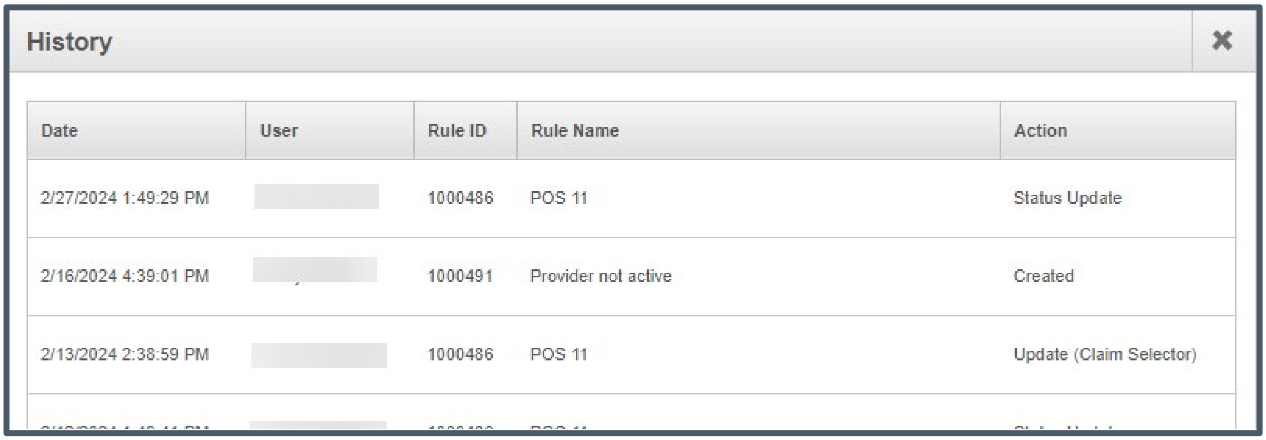
Viewing the history of the Rules Listing screen

To see an overview of the changes made to rules from the Rules Listing screen:

1. Access the Rule Listing screen and search for a rule.
2. Click the **View History** link.



The History screen will open showing all changes made in order of newest to oldest.



You will see:

- The date the rule was updated.
- The user who completed the update.
- The rule ID and name.
- The action that was taken at a screen level.
- To view a more detailed history of a rule's changes, view the individual history.

Revision log

Date	Description	Version
October 2025	• Updated the “Rule Builder with **Altitude**Assist” screenshots • Added information about the video tutorial to the “Using Rule Builder with AltitudeAssist to create a new rule” section • Added information about the Available Claim Fields link and screen to the “Creating a new rule with a description” section • Added the “Viewing the full rule from the Rule Listing screen” section	10
April 2025	• Retitled to Rule Manager and AltitudeAssist Guide	9
March 2025	• Reorganized/edited the “Using the Rule Listing screen” section • Added the “Using Rule Builder with AltitudeAssist to create a new rule” section	8
March 2025	Maintenance	7
October 2024	Added a note to the Overview section	6
July 2024	• Added link to the Claim Fields and Claim Form Locator document • Updated formatting	5
March 2024	Corrected document links	4
March 2024	• Updated screenshots of action menu throughout • Added the **Viewing a history of rules** section	3
January 2024	Updated processes throughout	2