



# 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 **AltitudeAssist™**, 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**.

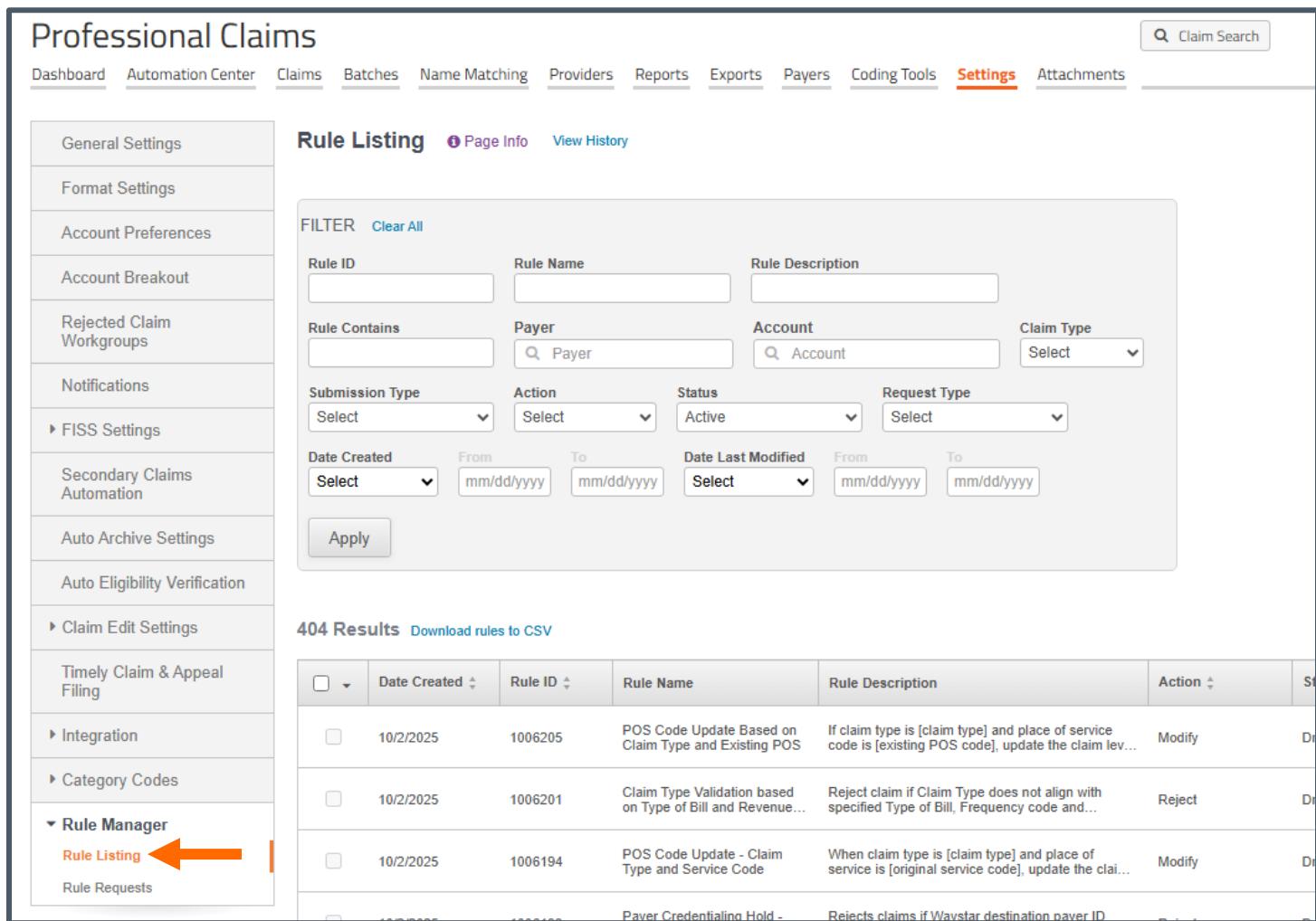
The Rule Listing screen will open.

- 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 ID	Date Created	Rule Name	Rule Description	Action
3/24/2025	1003067	Rev Code & Procedure Code Mismatch	Rejects claims when the revenue code starts with a specific value and the procedure code matches...	Reject
3/24/2025	1003064	Code 99212 to 99213	This rule modifies procedure codes. Specifically, if the procedure code is 99212, it will be...	Modify
3/20/2025	1003048	Payer SKNV0 Claim Hold		

**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.



The screenshot shows the Waystar Professional Claims interface. The top navigation bar includes links for Dashboard, Automation Center, Claims, Batches, Name Matching, Providers, Reports, Exports, Payers, Coding Tools, **Settings**, and Attachments. A search bar is located in the top right corner. The left sidebar has a tree view with sections like General Settings, Format Settings, Account Preferences, Account Breakout, Rejected Claim Workgroups, Notifications, FISS Settings, Secondary Claims Automation, Auto Archive Settings, Auto Eligibility Verification, Claim Edit Settings, Timely Claim & Appeal Filing, Integration, Category Codes, and Rule Manager, with 'Rule Listing' selected. The main content area displays a 'Rule Listing' table with four rows of data. The table columns are: Date Created, Rule ID, Rule Name, Rule Description, Action, and Status. The first row's Rule Name is 'POS Code Update Based on Claim Type and Existing POS'. The second row's Rule Name is 'Claim Type Validation based on Type of Bill and Revenue...'. The third row's Rule Name is 'POS Code Update - Claim Type and Service Code'. The fourth row's Rule Name is 'Payer Credentialing Hold - Rejects claims if Wavstar destination payer ID...'. An orange arrow points to the 'Rule Listing' link in the sidebar.

Date Created	Rule ID	Rule Name	Rule Description	Action	Status
10/2/2025	1006205	POS Code Update Based on Claim Type and Existing POS	If claim type is [claim type] and place of service code is [existing POS code], update the claim lev...	Modify	Dr
10/2/2025	1006201	Claim Type Validation based on Type of Bill and Revenue...	Reject claim if Claim Type does not align with specified Type of Bill, Frequency code and...	Reject	Dr
10/2/2025	1006194	POS Code Update - Claim Type and Service Code	When claim type is [claim type] and place of service is [original service code], update the clai...	Modify	Dr
		Payer Credentialing Hold -	Rejects claims if Wavstar destination payer ID...		

## 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.

The screenshot shows the 'Rule Listing' page. At the top, there are buttons for 'Create New Rule' and 'View History'. Below that is a 'FILTER' section with various search criteria. The 'Apply' button is highlighted with an orange arrow. At the bottom, it says '404 Results' and 'Download rules to CSV'.

Rule ID	Rule Name	Rule Description
<input type="text"/>	<input type="text"/>	<input type="text"/>

Rule Contains	Payer	Account	Claim Type
<input type="text"/>	<input type="text"/> Payer	<input type="text"/> Account	<input type="button" value="Select"/>

Submission Type	Action	Status	Request Type
<input type="button" value="Select"/>	<input type="button" value="Select"/>	<input type="button" value="Active"/>	<input type="button" value="Select"/>

Date Created	From	To	Date Last Modified	From	To
<input type="button" value="Select"/>	<input type="text"/> mm/dd/yyyy	<input type="text"/> mm/dd/yyyy	<input type="button" value="Select"/>	<input type="text"/> mm/dd/yyyy	<input type="text"/> mm/dd/yyyy

- **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.

The screenshot shows the 'Professional Claims' section of the Waystar interface. At the top, there's a navigation bar with tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS, and ACCOUNT. Under 'CLAIMS PROCESSING', there are sub-tabs: Dashboard, Claims, Batches, Name Matching, Providers, Reports, Exports, Payers, Coding Tools, Settings (which is highlighted in red), MIPS Quality, and Attachments. Below this, a sidebar on the left has buttons for General Settings, Format Settings (with a red arrow pointing to it), Account Preferences, and Account Breakout. The main area is titled 'Rule Listing' with a 'Page Info' link. It includes a 'Create New Rule' button and a 'View History' link. At the bottom, there's a 'FILTER' section with 'Clear All' and three columns: Rule ID, Rule Name, and Rule Description.

## 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.

The screenshot shows the 'Rule Manager' section under 'Auto Eligibility Verification'. On the left, there's a sidebar with buttons for Auto Eligibility Verification, Claim Edit Settings, Timely Claim & Appeal Filing (with a red arrow pointing to it), Integration, Category Codes, and Rule Manager (which is expanded). Rule Manager contains 'Rule Listing' and 'Rule Requests'. The main area shows a table with 707 results. The table has columns: Status (dropdown with a red arrow pointing to it), Date Created, Rule ID, Rule Name, Rule Description, and Action (with icons for Rej, Mod, Del, and Info). The first two rows of the table are visible.

## 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.

The screenshot shows a table of rule results. At the top, there are date filters and an 'Apply' button. Below the table, the text '314 Results' is followed by a blue link 'Download rules to CSV' with an orange arrow pointing to it. The table columns include Rule ID, Rule Name, Rule Description, Claim Type, Date Created, and Date Last Modified. Two rows are visible: one for rule 1000317 and another for rule 1000202.

Rule ID	Rule Name	Rule Description	Claim Type	Date Created	Date Last Modified
1000317	My Payer Name -...	If My Payer Name CONTAINS A Both	Both	10/5/2023	11/14/2023
1000202	Revenue code 250	rxv code 250	Professional	01/10/2023	11/14/2023

## Determining a manually created or AI-assisted rule

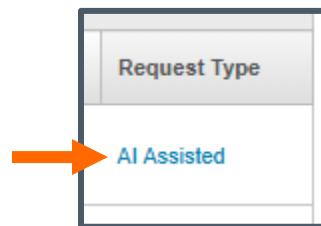
To determine if a rule was created manually using Rule Wizard or was AI-assisted using Rule Builder with AltitudeAssist:

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

The screenshot shows a table of rule results with a header 'Status'. The 'Request Type' column is highlighted with an orange box. The first row, 'Test Rule for OOB', has a 'Request Type' of 'Manual'. The second row, 'Rule for procedure and modifier', has a 'Request Type' of 'AI Assisted' with an orange arrow pointing to it. Other columns include Date Created, Rule ID, Rule Name, Rule Description, Action, Status, Claim Type, Accounts, Date Last Modified, and Request ID.

Status	Date Created	Rule ID	Rule Name	Rule Description	Action	Status	Claim Type	Accounts	Date Last Modified	Request ID	Request Type
	10/22/2024	1001589	Test Rule for OOB	This is a test rule for the dacpac OOB changes	Reject	Test	Both	ZirMed Test Account	10/22/2024	1079	Manual
	10/10/2024	1001533	Rule for procedure and modifier	Institutional Claims, all submissions, account 4520, if revenue code is 360 and procedure code is...	Modify	Deactivated	Institutional				AI Assisted

3. For rules created with AltitudeAssist, 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 options that display will depend on the status of the rule (Deactivated, Incomplete, Draft, Test, or Production).

	Rule ID	Rule Name	Rule Description	Claim Type	Date Created	Date Last Modified	Accounts	Action	Status
<input type="checkbox"/>	1000486	POS 11	If POS is 11 then change to 53	Both	2/12/2024	3/8/2024	10 Accounts	Modify	Test
<input type="checkbox"/>	1000491	Provider not active	Make to stop a claim from going out for provider XXX	Professional	2/16/2024		America Healthcare FQHC	Reject	Test
<input type="checkbox"/>	1000484	Place of service	If place of service is 11 then	Professional	2/8/2024	2/12/2024	10 Accounts	Reject	Test

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.

404 Results <a href="#">Download rules to CSV</a>				
	Status	Date Created	Rule ID	Rule Name
<input type="checkbox"/>	1/11/2024	1000453	Modify POS 11 to 53	All Submissions: If destination payer ID is not 87726 and procedure code 58671 is present then reject claim with "REJECTED PER CUSTOMER REQUEST - PROCEDURE CODE 58671"
<input type="checkbox"/>	11/9/2023	162	Destination payer and procedure code	All Submissions: If destination payer ID is not 87726 and procedure code 58671 is present the...

# 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 **AltitudeAssist**.

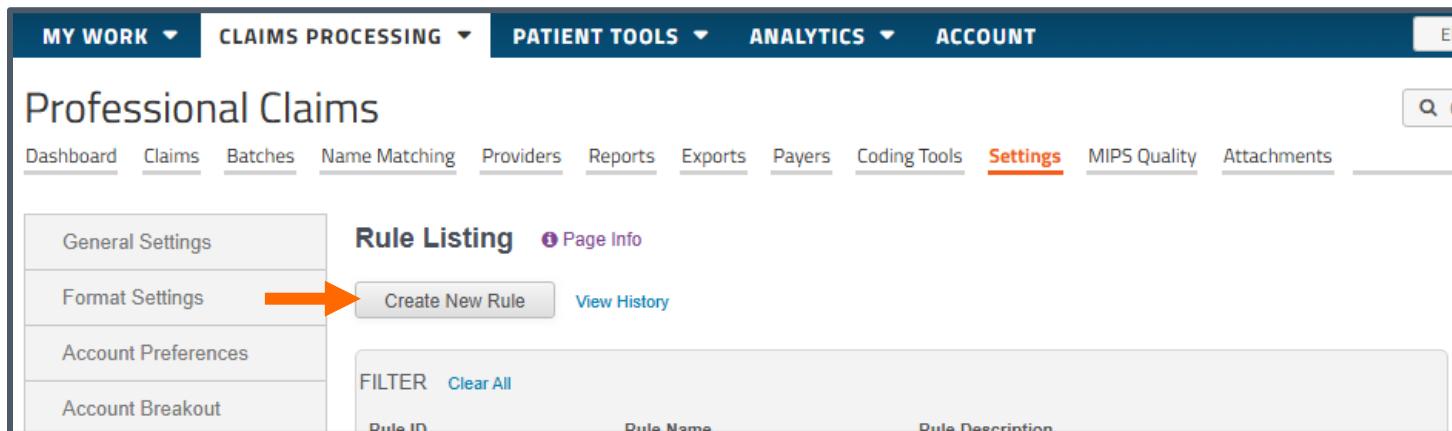
## Using Rule Wizard to manually create a new rule

### 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.

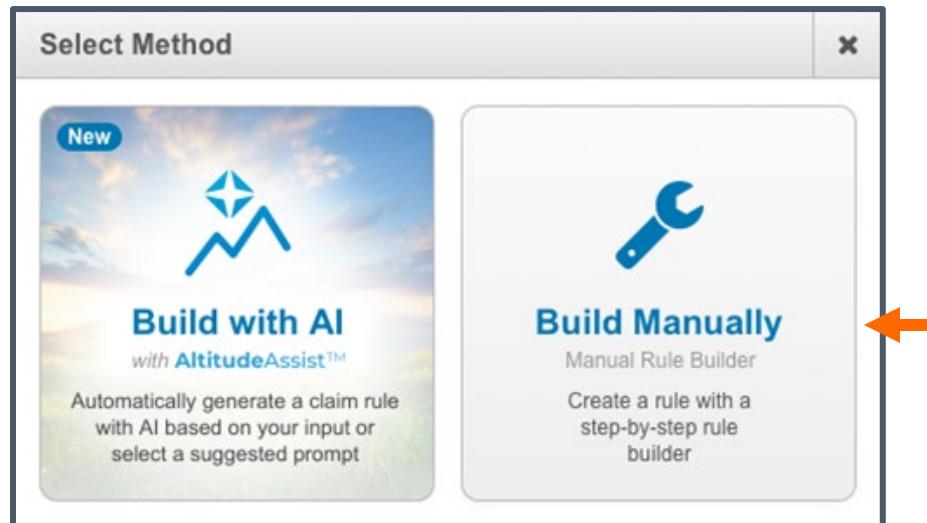
To create a new rule:

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.



The screenshot shows the Waystar Professional Claims interface. At the top, there's a navigation bar with tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS, and ACCOUNT. Under PATIENT TOOLS, the 'Settings' tab is highlighted. Below the navigation bar, the main title is 'Professional Claims'. A secondary navigation bar below the main title includes links: Dashboard, Claims, Batches, Name Matching, Providers, Reports, Exports, Payers, Coding Tools, Settings (which is active), MIPS Quality, and Attachments. On the left, there's a sidebar with options: General Settings (selected), Format Settings, Account Preferences, and Account Breakout. The main content area is titled 'Rule Listing' and contains a 'Page Info' link. Below this, there's a 'Create New Rule' button, which is highlighted with a large orange arrow. Further down, there's a 'FILTER' section with a 'Clear All' link, and columns for Rule ID, Rule Name, and Rule Description.

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



Rule Wizard will open to the Basic Information tab.

The screenshot shows the 'Rule Wizard' interface with the 'Basic Information' tab selected. The top navigation bar includes 'Rule Listing > Rule Manager' and tabs for 'Rule Wizard' and 'Page Info'. Below the tabs is a progress bar with four steps: 'Basic Information' (selected), 'Claim Selector', 'Action Builder', and 'Confirm and Save'. The 'Basic Information' section contains fields for 'Rule Name' (empty), 'Rule Description' (empty), 'Claim Type' (dropdown menu set to 'Select'), 'Submission Type' (dropdown menu set to 'Select'), 'Status' (dropdown menu set to 'Test'), and account selection buttons ('Add Accounts', 'Add All', 'Clear All'). A '0 Accounts' message is displayed above a search bar ('Filter this list') and a list area showing three horizontal ellipsis icons. At the bottom is a 'Continue' button.

## 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:

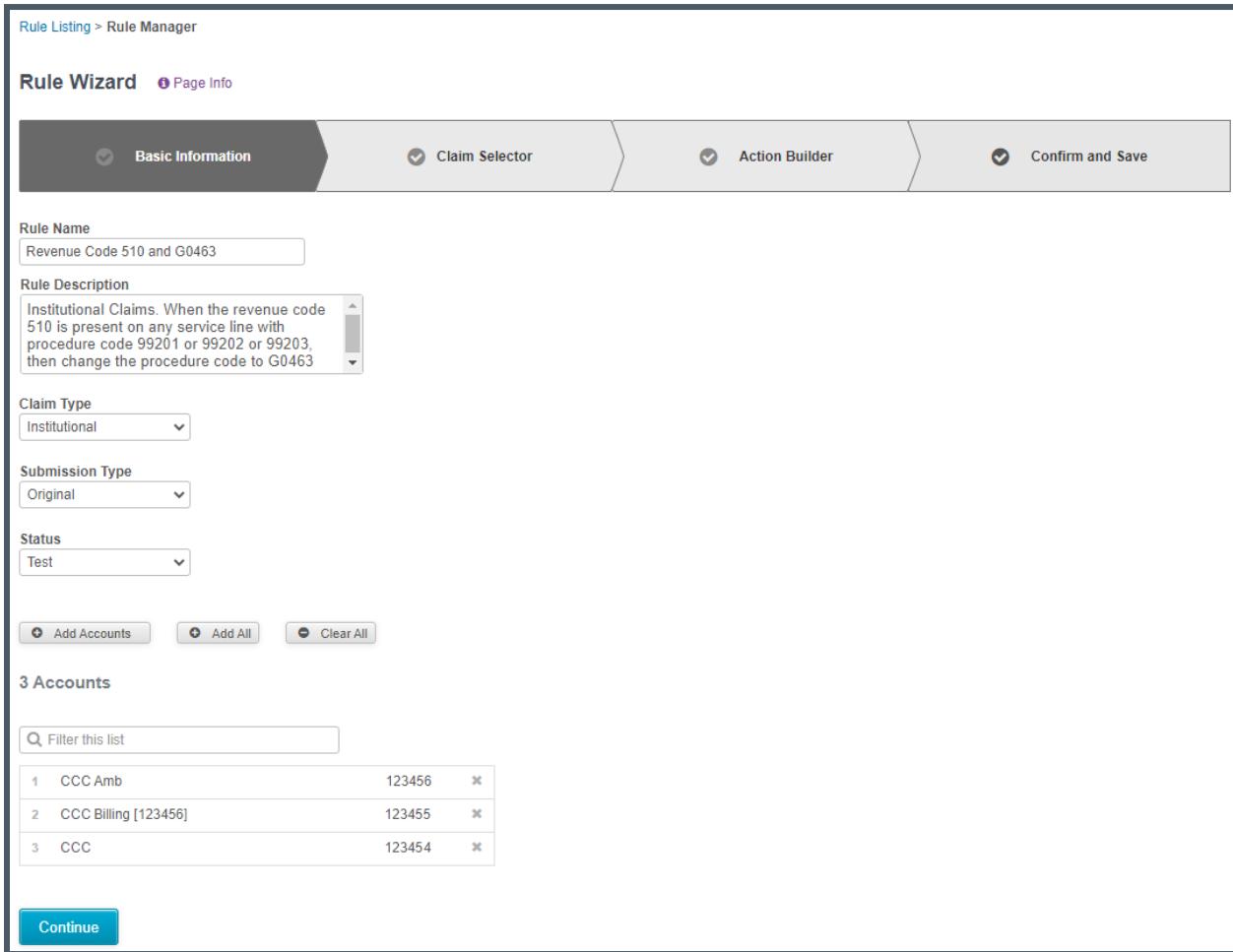
- **Rule Name:** Enter a name for the new rule. For example, **Revenue Code 510**.
- **Rule Description:** Enter a brief description of what is expected of the rule. For example: Institutional Claims. When the revenue code 510 is present on any service line with procedure code 99201 or 99202 or 99203, 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 screenshot shows a modal dialog titled "Add Accounts to Rule". At the top is a search bar with the placeholder "ccc". Below it is a section labeled "Select All Accounts" with a "Select All" link. A list of accounts follows, each with a checkbox. The checkboxes for "CCC Amb (123456)", "CCC Billing [123456] (123455)", and "CCC (123454)" are checked. The checkboxes for "CCC office (123453)" and "CCCTest (123452)" are unchecked. At the bottom of the list is a blue "Save" button.

The following shows the Basic Information tab with example data.



**Rule Listing > Rule Manager**

**Rule Wizard** [Page Info](#)

Basic Information

Rule Name: Revenue Code 510 and G0463

Rule Description: 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: Institutional

Submission Type: Original

Status: Test

Add Accounts: Add All Clear All

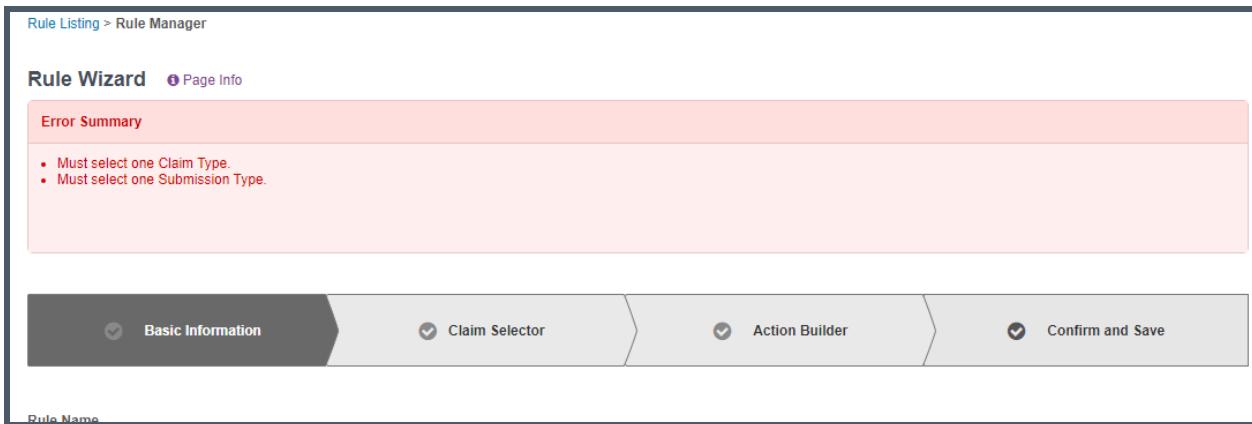
**3 Accounts**

	Account	ID	Action
1	CCC Amb	123456	X
2	CCC Billing [123456]	123455	X
3	CCC	123454	X

**Continue**

- 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.



**Rule Listing > Rule Manager**

**Rule Wizard** [Page Info](#)

Error Summary

- Must select one Claim Type.
- Must select one Submission Type.

Basic Information

Claim Selector

Action Builder

Confirm and Save

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 screenshot shows the Rule Wizard interface on the 'Claim Selector' tab. It displays two 'EDIT RULE' sections. The top section is for 'Revenue Code (Institutional Only)' and the bottom section is for 'Procedure Code'. Both sections have dropdowns for 'IS' and 'Any Of', and a list of codes with checkboxes. The list for Revenue Code includes: 99201, 99202, 99203, 0001A, 0001F, 0001M, 0001T, 0001U. The list for Procedure Code includes: 99201, 99202, 99203, 0001A, 0001F, 0001M, 0001T, 0001U. There are '+ OR statement' and '+ AND statement' links below each section. At the bottom are 'Back' and 'Continue' buttons.

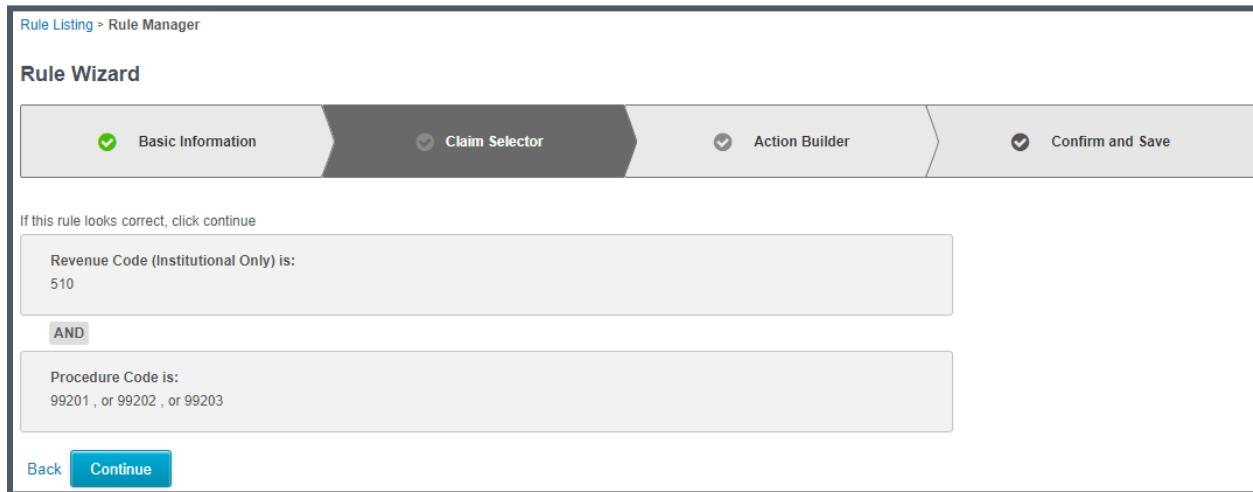
The Claim Selector Summary screen will open.

- 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.



Rule Listing > Rule Manager

**Rule Wizard**

If this rule looks correct, click continue

Revenue Code (Institutional Only) is:  
510

AND

Procedure Code is:  
99201, or 99202, or 99203

Back Continue

- 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.

The screenshot shows the 'Rule Wizard' interface with the 'Action Builder' tab selected. At the top, there's a ribbon with tabs: 'Basic Information' (green checkmark), 'Claim Selector' (green checkmark), 'Action Builder' (gray), and 'Confirm and Save' (gray). Below the ribbon, the 'Action' dropdown is set to 'Modify Claim'. Under 'Action Builder', there's a section for 'Field' (Procedure Code) and 'New Value' (G0463). A 'Delete' icon is next to the New Value input. Below this, there's a 'Add Field' dropdown with 'Select' option. At the bottom left are 'Back' and 'Continue' buttons, with 'Continue' being blue and bold.

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:

- 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.

- 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.

- 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.

Rule Listing > Rule Manager

Rule Wizard

Basic Information    Claim Selector    Action Builder    Confirm and Save

Rule Name: Revenue Code 510 and G0463  
Claim Type: Institutional  
Status: Test  
Rule Description: 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  
Submission Type: Original  
Accounts: 2 Accounts

RULE SUMMARY

For Institutional claims where Revenue Code (Institutional Only) is 510 , and Procedure Code is 99201 , or 99202 , or 99203 , change is Procedure Code to G0463

My Organization takes full responsibility for all modifications or rejections resulting from this rule

Back **Save**

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 AI 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 **AltitudeAssist** 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 AltitudeAssist 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:

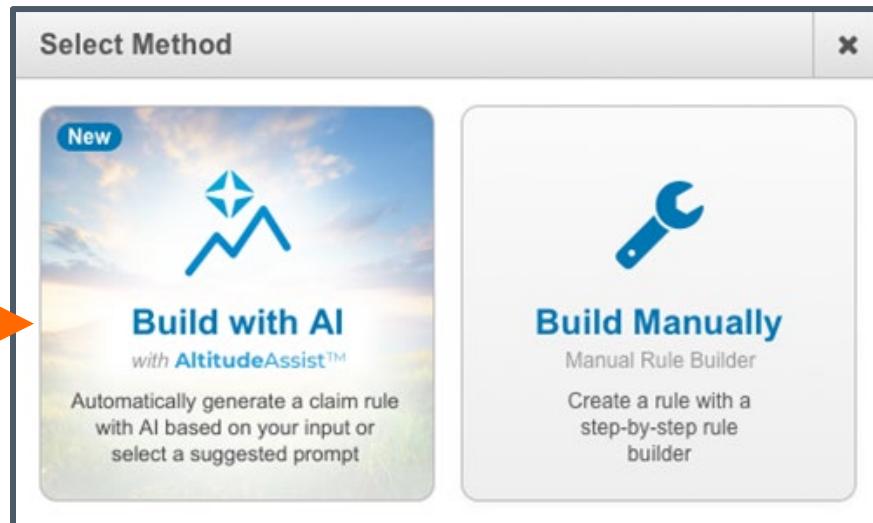
1. [Access the Rule Listing screen](#).

**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.

The screenshot shows the Waystar software interface with a dark blue header bar containing navigation links: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS, and ACCOUNT. Below the header is a sub-navigation bar with links: Dashboard, Claims, Batches, Name Matching, Providers, Reports, Exports, Payers, Coding Tools, Settings (which is highlighted in red), MIPS Quality, and Attachments. The main content area is titled "Professional Claims" and features a sidebar with four categories: General Settings, Format Settings (which has a red arrow pointing to it), Account Preferences, and Account Breakout. The main panel is titled "Rule Listing" and includes a "Page Info" link. It features a "Create New Rule" button, a "View History" link, and a "FILTER" section with "Clear All" options. Below these are columns for Rule ID, Rule Name, and Rule Description.

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



The Rule Builder with **AltitudeAssist** screen will open.

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

The screenshot shows the Waystar Professional Claims interface. The top navigation bar includes 'MY WORK', 'CLAIMS PROCESSING', 'PATIENT TOOLS', 'ANALYTICS', 'MEDICARE', and 'ACCOUNT'. A 'Claim Search' bar is on the right. Below it, the 'Professional Claims' section has tabs for 'Dashboard', 'Automation Center', 'Claims', 'Batches', 'Name Matching', 'Providers', 'Reports', 'Exports', 'Payers', 'Coding Tools', 'Settings' (which is highlighted in red), and 'Attachments'. Under 'Professional Claims', the 'Rule Listing > Rule Builder' path is shown. The 'Rule Builder with AltitudeAssist™' section contains a text input field with placeholder 'Enter text here.', a 'Generate Draft Rule' button, and links for 'Available Claim Fields' and 'Video Tutorial' (which is highlighted with an orange arrow). Below this, the 'Example Prompts' section shows categories for 'Reject Claims' and 'Modify Claims'. Under 'Reject Claims', there are boxes for 'Revenue code & procedure code rejection', 'Missing NDC rejection', 'Place of service rejection', and 'Total charge rejection'. Under 'Modify Claims', there is a box for 'Payer credentialing rejection hold' and 'Type of bill rejection'.

- Powered by AI, the **AltitudeAssist** 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.

- To view what claim fields are available in Rule Builder with **AltitudeAssist**:

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

The Available Claim Fields screen will open.

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

Available Claim Fields	
Claim Field	<a href="#">Clear</a>
<input type="text"/> Filter claim fields below	
<input checked="" type="radio"/> Professional	<input type="radio"/> Institutional
<input type="radio"/> Both	
<b>5 Results</b>	
Claim Note (Professional)	
CLIA Number-Claim Level (Professional Only)	
Diagnosis (Professional Only)	
Diagnosis Code Sequence (Professional Only)	
Modifier (Any)	

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

If an error appears on the screen, see the [Reviewing error messages](#) section.

Rule Listing > Rule Builder

**Rule Builder** with AltitudeAssist™

Describe your rule and click "Generate Draft Rule" button to automatically create a draft rule or try an example prompt below to get started

All Submissions: If destination payer ID is not 87726 and procedure code 58671 is present then reject claim with "REJECTED PER CUSTOMER REQUEST - PROCEDURE CODE 58671"

Generate Draft Rule

[Available Claim Fields](#) [Video Tutorial](#)

[Example Prompts](#)

- AltitudeAssist** 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.

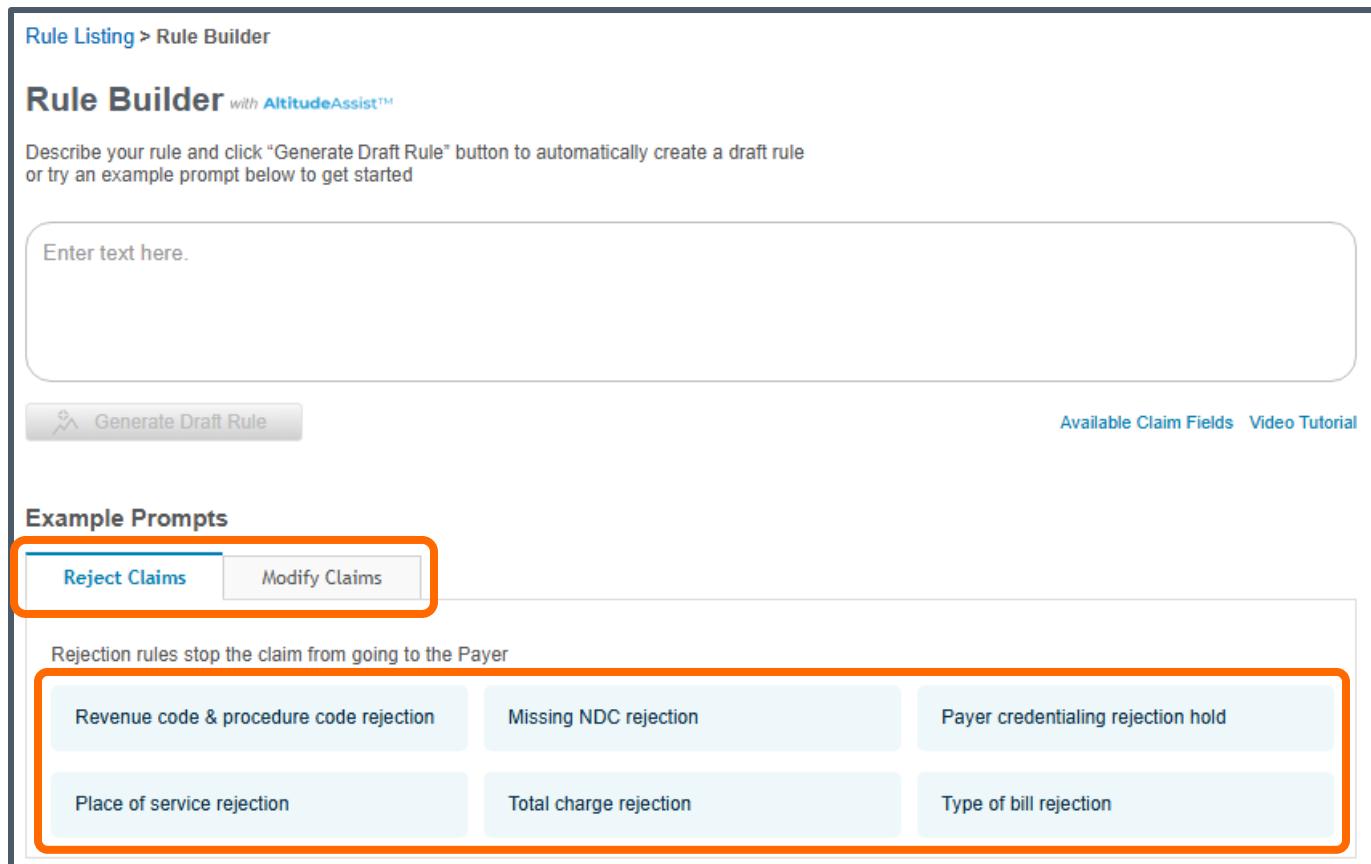
## Using Example Prompts to start your description

**Example Prompts** are available at the bottom of the Rule Builder with **AltitudeAssist** 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 **AltitudeAssist** screen as explained in the [Creating a new rule with a description](#) section.
2. From the Rule Builder with **AltitudeAssist** 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.



The screenshot shows the Waystar Rule Builder interface. At the top, there's a breadcrumb navigation: Rule Listing > Rule Builder. Below that, the title is "Rule Builder with AltitudeAssist™". A descriptive text box says: "Describe your rule and click "Generate Draft Rule" button to automatically create a draft rule or try an example prompt below to get started". There's a large text input field with placeholder text "Enter text here.". Below it is a "Generate Draft Rule" button with a gear icon. To the right are links for "Available Claim Fields" and "Video Tutorial".

**Example Prompts** section:

- Reject Claims** (highlighted with an orange border)
- Modify Claims**

Below this, under "Rejection rules stop the claim from going to the Payer", are six example prompts arranged in a grid:

Revenue code & procedure code rejection	Missing NDC rejection	Payer credentialing rejection hold
Place of service rejection	Total charge rejection	Type of bill rejection

4. Rule Builder, using **AltitudeAssist**, 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.

Rule Listing > Rule Builder

## Rule Builder with AltitudeAssist™

Describe your rule and click "Generate Draft Rule" button to automatically create a draft rule or try an example prompt below to get started

For claim type **enter claim type here**, if procedure code begins with **enter procedure code here** and NDC is empty, reject the claim with rejection message: Review claim for missing NDC code



 [Generate Draft Rule](#) Available Claim Fields [Video Tutorial](#)

### Example Prompts

[Reject Claims](#) [Modify Claims](#)

[Revenue code & procedure code rejection](#)

[Missing NDC rejection](#)

[Payer credentialing rejection hold](#)

[Place of service rejection](#)

[Total charge rejection](#)

[Type of bill rejection](#)

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. **AltitudeAssist** 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.

**Draft Rule**

**Rule draft ready for review and testing**

**RULE SUMMARY**  
For any claim where Type of Bill (Institutional Only) is claim type here, Revenue Code (Institutional Only) starts with enter revenue code here, and Procedure Code is enter procedure code here, reject the claim with rejection message "Review revenue code and procedure code.".

[Move to Test](#) [Keep as Draft](#) [Dismiss Draft](#)

**Details**

\* Rule Name: Rev Code/Procedure Code Mismatch

\* Rule Description:  
If claim type matches and revenue code begins with specified digits, and procedure code matches, reject the claim. Review revenue code and procedure code for accuracy.

\* Claim Type: Both

\* Submission Type: Both

\* Accounts  
Clear All  
1 Accounts  Select All  
Account Name or #  
 ZirMed Test Account (605)  
 Foundation for Advanced ASC LLC, dba Foundation for Advanced ASC LLC, dba Foundation for Advanced  
 ABC billing (65026)  
 ABC TEST (252064)  
 Allergy Partners (108915)  
 Another Place Medical (121964)  
 Authorization Team (Product and QA) Testing (296575)  
 baby child (22400)

**Conditions**

**IF**

**Clear All**

Type of Bill (Institutional Only) IS Any Of claim type here

+ OR statement

Revenue Code (Institutional Only) STARTS WITH Any Of enter revenue code here

+ OR statement

Procedure Code IS Any Of enter procedure code here

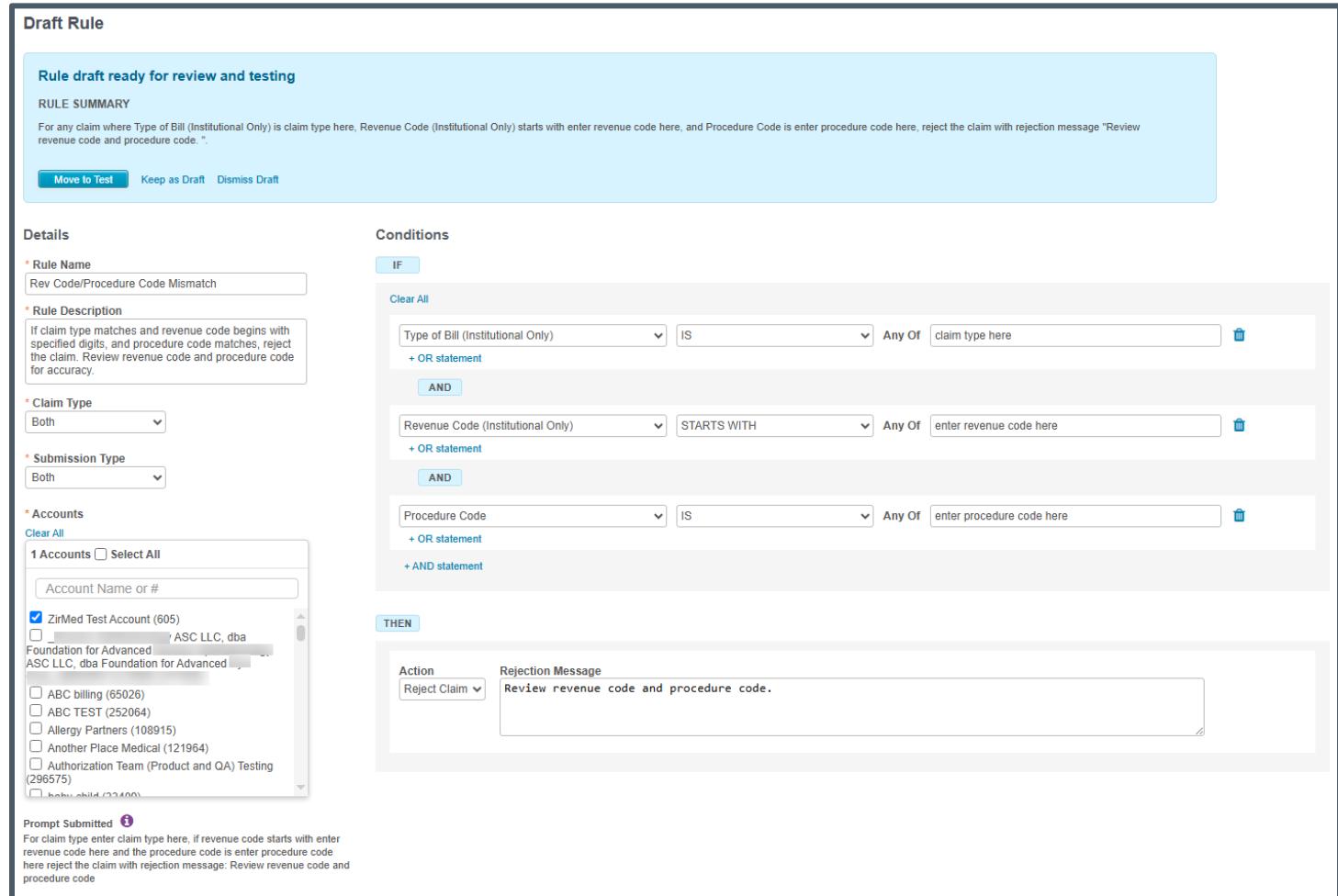
+ OR statement

+ AND statement

**THEN**

Action: Reject Claim  
Rejection Message: Review revenue code and procedure code.

**Prompt Submitted** ⓘ  
For claim type enter claim type here, if revenue code starts with enter revenue code here and the procedure code is enter procedure code here reject the claim with rejection message: Review revenue code and procedure code



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.

<input type="checkbox"/>	Date Created	Rule ID	Rule Name	Rule Description	Action	Status	Claim Type	Acco
<input type="checkbox"/>	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 AltitudeAssist 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.

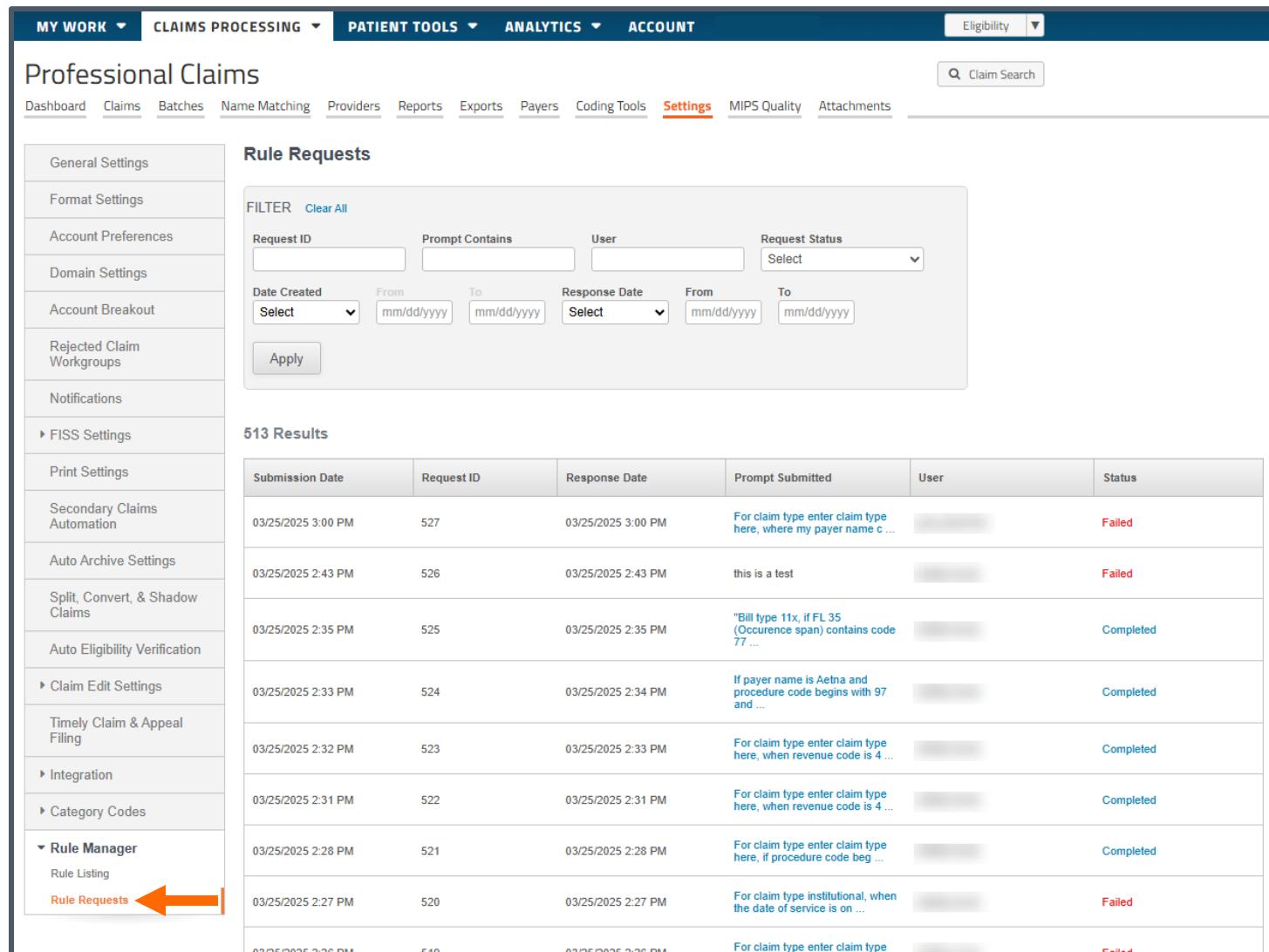
# Reviewing submitted Rule Requests

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.



The screenshot shows the Waystar Platform interface with the following details:

- Top Navigation:** MY WORK ▾, CLAIMS PROCESSING ▾, PATIENT TOOLS ▾, ANALYTICS ▾, ACCOUNT.
- Search Bar:** Claim Search.
- Sub-Header:** Professional Claims.
- Left Sidebar (under Settings):**
  - General Settings
  - Format Settings
  - Account Preferences
  - Domain Settings
  - Account Breakout
  - Rejected Claim Workgroups
  - Notifications
  - FISS Settings
  - Print Settings
  - Secondary Claims Automation
  - Auto Archive Settings
  - Split, Convert, & Shadow Claims
  - Auto Eligibility Verification
  - Claim Edit Settings
  - Timely Claim & Appeal Filing
  - Integration
  - Category Codes
  - Rule Manager
    - Rule Listing
    - Rule Requests** (highlighted with a red arrow)
- Rule Requests Section:**
  - FILTER** Clear All
  - Request ID, Prompt Contains, User, Request Status (Select dropdown).
  - Date Created, From, To, Response Date, From, To (date pickers).
  - Apply button.
- Results Table:** 513 Results
 

Submission Date	Request ID	Response Date	Prompt Submitted	User	Status
03/25/2025 3:00 PM	527	03/25/2025 3:00 PM	For claim type enter claim type here, where my payer name c ...	[REDACTED]	Failed
03/25/2025 2:43 PM	526	03/25/2025 2:43 PM	this is a test	[REDACTED]	Failed
03/25/2025 2:35 PM	525	03/25/2025 2:35 PM	"Bill type 11x, if FL 35 (Occurrence span) contains code 77 ...	[REDACTED]	Completed
03/25/2025 2:33 PM	524	03/25/2025 2:34 PM	If payer name is Aetna and procedure code begins with 97 and ...	[REDACTED]	Completed
03/25/2025 2:32 PM	523	03/25/2025 2:33 PM	For claim type enter claim type here, when revenue code is 4 ...	[REDACTED]	Completed
03/25/2025 2:31 PM	522	03/25/2025 2:31 PM	For claim type enter claim type here, when revenue code is 4 ...	[REDACTED]	Completed
03/25/2025 2:28 PM	521	03/25/2025 2:28 PM	For claim type enter claim type here, if procedure code beg ...	[REDACTED]	Completed
03/25/2025 2:27 PM	520	03/25/2025 2:27 PM	For claim type institutional, when the date of service is on ...	[REDACTED]	Failed
03/25/2025 2:26 PM	519	03/25/2025 2:26 PM	For claim type enter claim type	[REDACTED]	Failed

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

**Rule Requests**

**FILTER** [Clear All](#)

Request ID	Prompt Contains	User	Request Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	Select
Date Created	From	To	Response Date
Select	<input type="text"/> mm/dd/yyyy	<input type="text"/> mm/dd/yyyy	Select
From	<input type="text"/> mm/dd/yyyy	To	<input type="text"/> mm/dd/yyyy
<input type="button" value="Apply"/>			

**512 Results**

- b. When finished entering criteria, click the **Apply** 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.

13 Results <a href="#">Download rules to CSV</a>									
<a href="#">Status</a>									
	Rule ID	Rule Name	Rule Description	Claim Type	Date Created	Date Last Modified	Accounts	Action	Status
<input type="checkbox"/>	1000486	POS 11	If POS is 11 then change to 53	Both	2/12/2024	3/8/2024	10 Accounts	Modify	Test
<input type="checkbox"/>	1000494	Provider not active	Make to stop a claim from	Professional	7/18/2023		America Healthcare	Pending	Test

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).

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

Rule Listing > Rule Manager

Rule Wizard

Basic Information Claim Selector Action Builder Confirm and Save

Rule Name: DLL rejection modifiers

Rule Description: Original Submissions - If 74 is present as a modifier than reject.

Claim Type: Professional

Submission Type: Original

Status: Deactivated

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

- 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.

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

Submission type: Original

Accounts: 2 Accounts

RULE SUMMARY

For Institutional claims where Revenue Code (Institutional Only) is 510 , and Procedure Code is 99201 , or 99202 , or 99203 , change is Procedure Code to G0463

My Organization takes full responsibility for all modifications or rejections resulting from this rule

Back **Save**

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**.

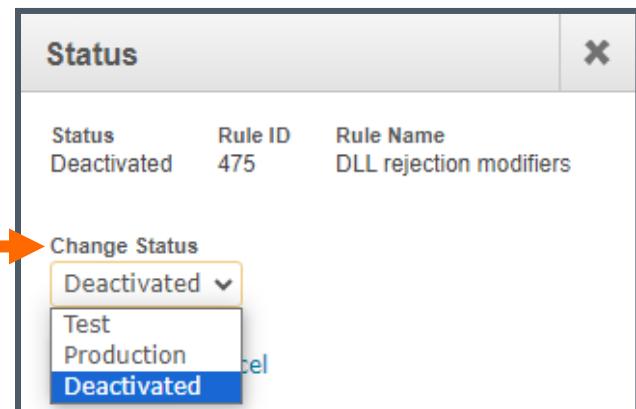
3. Click the **Status** button.

707 Results <a href="#">Download rules to CSV</a>				
	Date Created	Rule ID	Rule Name	Rule Description
<input type="checkbox"/>	3/24/2025	1003067	Rev Code & Procedure Code Mismatch	Rejects claims when the revenue code starts with a specific value and the procedure code matches...
<input type="checkbox"/>	3/24/2025	1003064	Code 99212 to 99213	This rule modifies procedure codes. Specifically, if the procedure code is 99212, it will be... <a href="#">More</a>
<input type="checkbox"/>	3/20/2025	1003048	Payer SKNV0 Claim Hold	<a href="#">Edit</a> <a href="#">Status</a> <a href="#">History</a> <a href="#">Deactivate</a>

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.

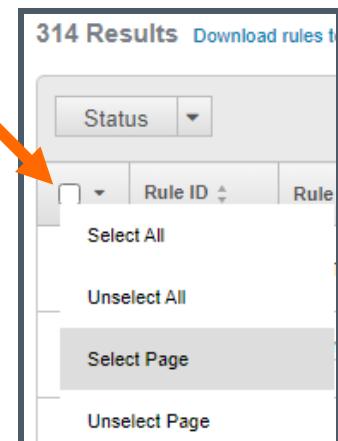
To set multiple statuses:

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**.

A screenshot of the "314 Results" screen. The "Status" dropdown is set to "Test". A second dropdown below it is set to "Production". The table lists several rules. Two specific rows have checkboxes checked in the first column, and an orange box highlights these checkboxes. The first row has a "checkbox" checked, and the second row has two checkboxes checked. The table columns include Name, Rule Description, Claim Type, and Account.

	Name	Rule Description	Claim Type	Account
<input type="checkbox"/>	Payer Name - ...	If My Payer Name CONTAINS ADMIN then ...	Both	272 Ad
<input type="checkbox"/>	1000203	Revenue code 250	Professional	272 Ad
<input checked="" type="checkbox"/>	1000212	DLL rejection modifiers	Original Submissions - If 74 is present as a modifier then reject.	Institutional
<input checked="" type="checkbox"/>	1000213	Billing Provider Tax ID - Reject	If Billing Provider Tax ID is then reject the claim.	Both
<input type="checkbox"/>	1000280	Attending Provider - Modify	If Attending Provider is	Both

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**.

The screenshot shows the 'Rule Wizard' interface with the 'Basic Information' tab selected. The 'Status' dropdown menu is open, displaying five options: 'Test', 'Select', 'Test', 'Production' (which is highlighted in blue), and 'Deactivated'. An orange arrow points to the 'Production' option. Other visible fields include 'Rule Name' (Revenue Code 510 and G0463), 'Rule Description' (Institutional Claims. When the inbound raw payer name is Anthem Medicare and Revenue code 510 is present on any service line, with Procedure code 99201 or 99202 or), 'Claim Type' (Institutional), 'Submission Type' (Original), and a 'Status' dropdown menu.

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.

Status									
	Rule ID	Rule Name	Rule Description	Claim Type	Date Created	Date Last Modified	Accounts	Action	Status
<input type="checkbox"/>	1000471	Modifier test 2	If Modifier is 50 and Procedure code is 77002 Reject per cli...	Both	2/1/2024	3/18/2024	ZirMed Test Account	Reject	Test
Results 1-1 of 1									

Per Page: 10

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.

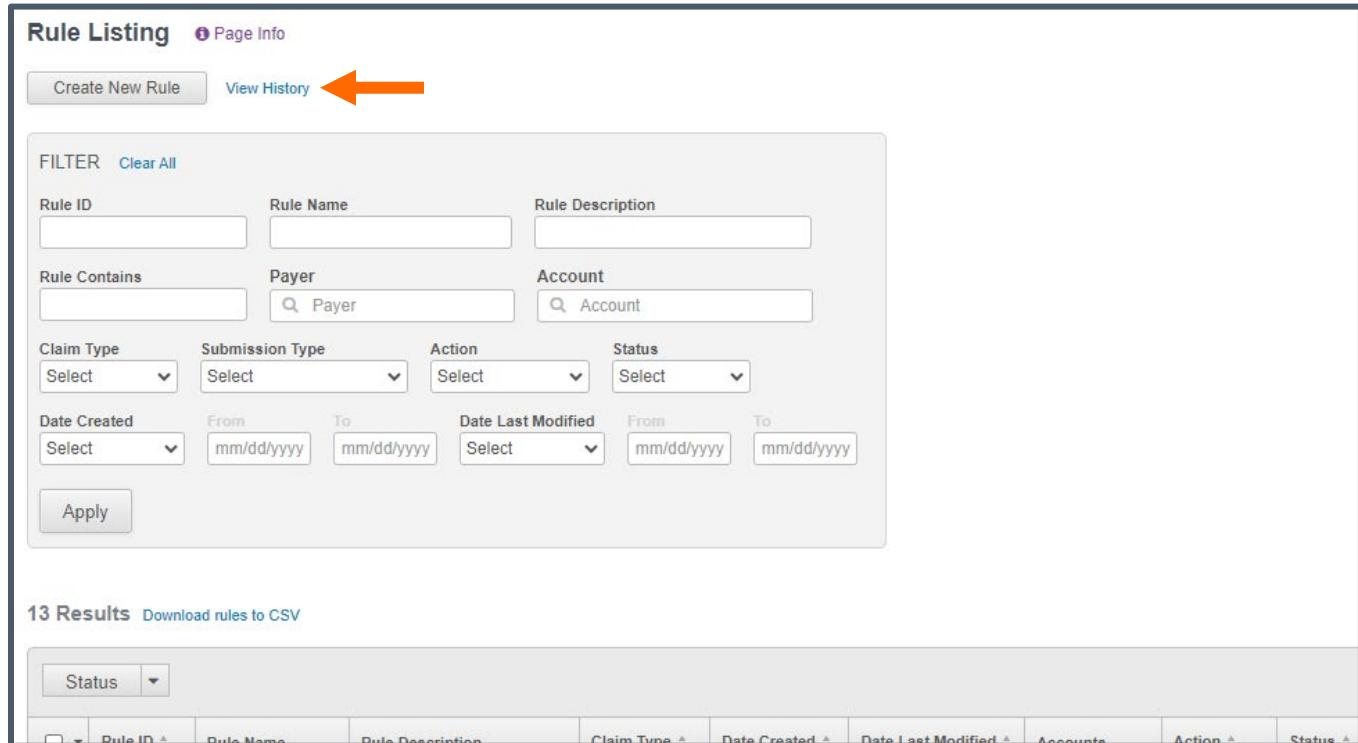
History for Rule ID 1000471				
Date Updated	User	Rule Element	Old Value	New Value
3/18/2024 3:52:31 PM		Submission Type	Both	Resubmission

- 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

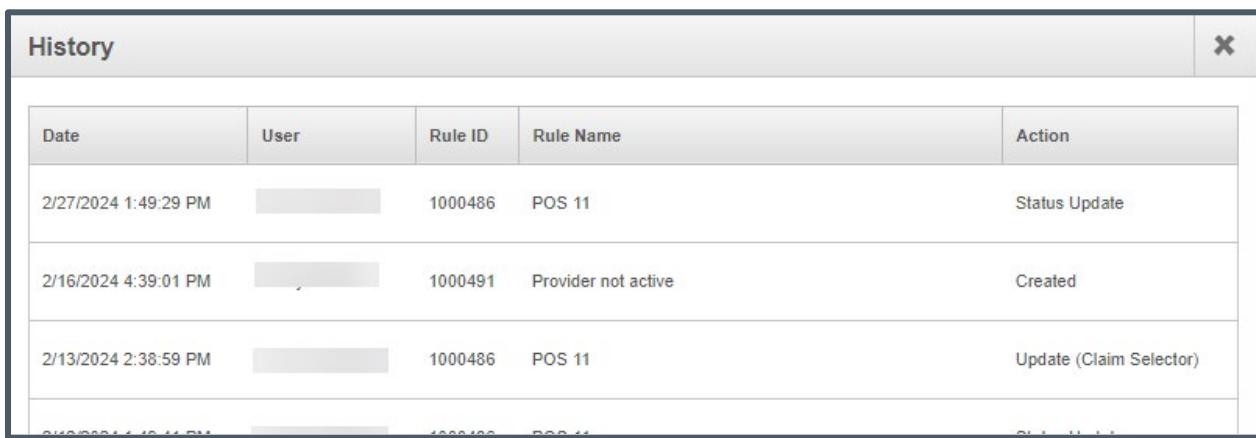
To see an overview of the changes made to rules from the Rules Listing screen:

1. [Access the Rule Listing screen and search for a rule.](#)
2. Click the **View History** link.



The screenshot shows the 'Rule Listing' page. At the top, there are two buttons: 'Create New Rule' and 'View History'. A large orange arrow points to the 'View History' button. Below these buttons is a 'FILTER' section with various search fields: Rule ID, Rule Name, Rule Description, Rule Contains, Payer, Account, Claim Type, Submission Type, Action, Status, Date Created, and Date Last Modified. There is also an 'Apply' button. At the bottom of the page, it says '13 Results' and 'Download rules to CSV'.

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



The screenshot shows the 'History' screen. It has a header row with columns for Date, User, Rule ID, Rule Name, and Action. Below this are four data rows:

Date	User	Rule ID	Rule Name	Action
2/27/2024 1:49:29 PM	[redacted]	1000486	POS 11	Status Update
2/16/2024 4:39:01 PM	[redacted]	1000491	Provider not active	Created
2/13/2024 2:38:59 PM	[redacted]	1000486	POS 11	Update (Claim Selector)

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	<ul style="list-style-type: none"> <li>Updated the “Rule Builder with <b>AltitudeAssist</b>” screenshots</li> <li>Added information about the video tutorial to the “Using Rule Builder with AltitudeAssist to create a new rule” section</li> <li>Added information about the Available Claim Fields link and screen to the “Creating a new rule with a description” section</li> <li>Added the “Viewing the full rule from the Rule Listing screen” section</li> </ul>	10
April 2025	<ul style="list-style-type: none"> <li>Retitled to Rule Manager and AltitudeAssist Guide</li> </ul>	9
March 2025	<ul style="list-style-type: none"> <li>Reorganized/edited the “Using the Rule Listing screen” section</li> <li>Added the “Using Rule Builder with AltitudeAssist to create a new rule” section</li> </ul>	8
March 2025	Maintenance	7
October 2024	Added a note to the Overview section	6
July 2024	<ul style="list-style-type: none"> <li>Added link to the Claim Fields and Claim Form Locator document</li> <li>Updated formatting</li> </ul>	5
March 2024	Corrected document links	4
March 2024	<ul style="list-style-type: none"> <li>Updated screenshots of action menu throughout</li> <li>Added the <b>Viewing a history of rules</b> section</li> </ul>	3
January 2024	Updated processes throughout	2