***How to create an Exception on Recon Page***

*Why do we need to make an exception? MBAT can remove an item within a Line of Service (LOS) or Cost Center (Cc) if it is found too not be chargeable. This way, the user does not have to apply a task to that item each time is seen in that LOS/Cc.*

***Step 1:***

Open the Reconciliation page that has the non-chargeable event.

Prior to creating the rule, click the CE: data information button and verify which data source received the event you are going to create the exception for. The rule is based on the *unique data field*.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Facilities: Westchester, MidHudson, Charity's, BSMG and APS | | | | |
|  | Software | Data Source Name | Data Source Id | Data Field |
|  | Cerner | Cerner SurgiNet | 3 | Service Line Code |
|  | Cerner | Cerner Tasks | 9 | Catalog Code |
|  | Cerner | Cerner Orders | 10 | Catalog Code |
|  |  |  |  |  |
| Facilities: Health Alliance and Margaretville | | | | |
|  | Software | Data Source Name | Data Source Id | Data Field |
|  | Paragon | Paragon SurgiNet | 25 | Service Line Code |
|  | Paragon | Paragon Orders | 26 | Catalog Code |

Then based on the facility, and the data source is their information in the “Data Field”? Yes, commence to step 2 of the process.

*****Step 2*:**

An exception can be applied on the Reconciliation page by clicking on the green plus icon.

The rule type box displays with "Clinical Event Exception". Click “**NEXT**”.

The Rule Editor screen displays. The system will auto fill the Rule Name (Patient Location – Description) along with the Exception Flag. If the data field has the necessary information for that data source the criteria will auto populate. However, if there is no information in the data field, please create a ticket for assistance.

The screen for the Rule Editor displays. With the Rule Name (Patient Location – Description) and the Exception Flag already filled in, the system will do the rest. The criteria will be filled in automatically if the data field has the right data for that data source. However, if Null is in the data box, please make a ticket for help.

Check that the rule information below "*Rules List*" is right. If it is, click "**SAVE**." The save button changes to , and in the upper left part of the Rule Editor screen, the system will show that it has been . To finish the process, click the "**CLOSE**" button.

**Note:**  The ‘exception’ workflow whereby will only work if it’s a **zero-dollar amount** (the user will not see the charge in the UI).

If a **charge amount** exists and an **exception** was created, the user will see the charge in the UI even though it’s an exception, with a small icon of an x or similar.

\*\* As a reminder, the rule will go into effect the day after it was created. \*\*