

NextStep

Set Up an Activity Code

Last Modified on 01/07/2026 10:40 am EST

Path: Maintenance and Setup > Activity Codes > Activity Codes

About

An Activity Code is a unique way to represent Services performed during a client visit and an easy way for a clinician to select what was done during the visit. Activity Codes are linked to Procedure Codes so that once the Billing Engine converts Services into Line Items, the Procedure Codes will be attached to claims. Activity Codes need to have Service Rates entered for the different Disciplines in your Agency, Insurance Coverage must be associated with each Party Type, and Places of Services considered billable for the code must be set in order to bill without a **Bill Status** error.



Note: NextStep has two types of billing modules. One is known as VFO and the other is VPO. The example screenshots below include both module types if the screens shown are different.

The steps below are intended to be followed in order to complete the setup.

Step 1: Add a New Activity Code

1. Navigate to the Master Activity Code List:**Maintenance and Setup > Activity Codes > Activity Codes**
2. Click the **Ok** button. The Master Activity Code Form is displayed.
3. Click the **Add** button.

VFO

Master Activity Code Form - (MSTACTL)

Activity Code	<input type="text"/>		
Description	<input type="text"/>		
Revenue Code	<input type="text"/>		
Type (Direct / Indirect)	<input type="checkbox"/>		
Billable Activity	<input type="checkbox"/>		
Minimum Time To Bill	00 : 00	Maximum Time To Bill	00 : 00
NDC	<input type="text"/>		
Units	<input type="text"/>		
Unit Of Measure	<input type="text"/>		
Group Flag	<input type="checkbox"/>		
Service Cost (Direct)	\$0.00		
Service Cost (Indirect)	\$0.00		
Modifier	<input type="text"/>		
Case Management	<input type="checkbox"/>		
One Charge For Same Activity Code/DateTime/Staff	<input type="checkbox"/>		
User Id	<input type="text"/>		
Control Date/Time / / : : AM			
Add Edit Delete Exit (Esc) < < > > Act Code List			
48 records loaded			

VPO



Master Activity Code Form - (MSTACTL)

Activity Code: Description:

Type (Direct / Indirect / Staff / Attendance): Revenue Code:

Billable Activity: Minimum Time To Bill: 00 : 00 Maximum Time To Bill: 00 : 00

DCH Cross Reference:

NDC:

Units:

Unit Of Measure:

Program Element:

Program Sub-Element:

Group Flag: CSM Only Assessment

Allow Unregistered Client: Allow Bypass Program Open Edit: Override IPS Required Edit:

Client Number Required: Allow Service Transfer To CR: Allow Authorizations:

Exclude On Line Items Auto Pay / Adjustment Form: Case Management: One Charge For Same Activity Code/DateTime/Staff:

Modifier:

Service Cost (Direct): \$0.00 Service Cost (Indirect): \$0.00

User Id: Control Date/Time: / / : : AM

Add | Edit | Delete | Exit (Esc) | < < > > | 8 records loaded | Act Code List

4. Complete the fields below. While there are several items that define an Activity Code, the Code, Description, and Billable Activity are the most commonly used fields. Required fields are marked with an asterisk.

- ***Activity Code:** Unique code set by your Agency for a specific Service.
- ***Description:** Description of the Activity Code/what it represents. This is displayed in the Master Activity Code List (Activity Code Description section).
- ***Type (Direct/Indirect):** D (Direct) is set as default. Do not change.
- **Revenue Code:** Enter a value for Institutional/UBs claims. This will only show on institutional claims.
- **Billable Activity:** Select the checkbox to make this Activity Code billable.
- **Minimum/Maximum Times To Bill:** This sets the time boundaries for what is considered billable. If the documented time of visit is outside of these limits, a Bill Status error is displayed when converting Services to Line items. For example, if there is a Minimum Time to Bill setting of 8 minutes, anything under 8 minutes would not be billable and throw a Bill Status error.
- **NDC Code:** If applicable, enter the National Drug Code, numeric identifier for a medication.
- **Units/Units of Measure:** If applicable, add the units/units of measure for a medication.
- **Modifier:** This is strictly used for modifiers that will always show up with this Activity Code. Activity Codes can be added at a more granular level per Party Type, see the section below: **Step 3: Add Activity Code Insurance Coverage**

5. Click the **Save** button.

6. Return to the Master Activity Code List by clicking the **Act Code List** button and proceed to **Step 2: Add Activity Code Service Rates**.

Master Activity Code Form - (MSTACTL)

Activity Code: 90791 Description: INITIAL EVALUATION

Type (Direct / Indirect): D

Billable Activity:

Minimum Time To Bill: 00 : 00 Maximum Time To Bill: 00 : 00

NDC:

Units:

Unit Of Measure:

Group Flag:

Service Cost (Direct):

Service Cost (Indirect):

Modifier:

Case Management: One Charge For Same Activity Code/DateTime/Staff: Show Referring Provider as Ordering Provider on Prof 837:

User Id: dmhanna Control Date/Time: 03/17/2021 08:54:04 AM

Add | Edit | Delete | Exit (Esc) | < < > > | 48 records loaded | Act Code List

VPO





SS Master Activity Code Form - (MSTACTL)

Activity Code	90791	Description	INITIAL EVALUATION
Type (Direct / Indirect / Staff / Attendance)	D	Revenue Code	
Billable Activity	<input checked="" type="checkbox"/>	Minimum Time To Bill	00 : 00
DCH Cross Reference		Maximum Time To Bill	00 : 00
NDC			
Units			
Unit Of Measure			
Program Element			
Program Sub-Element			
Group Flag	<input type="checkbox"/> CSM Only	<input type="checkbox"/> Assessment	<input type="checkbox"/>
Allow Unregistered Client	<input type="checkbox"/>	<input type="checkbox"/> Override IPS Required Edit	<input type="checkbox"/>
Client Number Required	<input type="checkbox"/>	<input type="checkbox"/> Allow Service Transfer To CR	<input type="checkbox"/>
Exclude On Line Items Auto Pay / Adjustment Form	<input type="checkbox"/>	<input type="checkbox"/> Allow Authorizations	<input type="checkbox"/>
Modifier		<input type="checkbox"/> Case Management	<input type="checkbox"/> One Charge For Same Activity Code/DateTime/Staff
Service Cost (Direct)		Service Cost (Indirect)	
User Id	mzlanley	Control Date/Time	09/27/2024 01:16:41 PM
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Exit (Esc)"/> <input type="button" value="Act Code List"/>			
<input type="button" value="<"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value=">"/> 178 records loaded			

Step 2: Add Activity Code Service Rates

For **each** Discipline in your Agency, you will need to set the Service Rate (cost per unit) for the Activity Code.

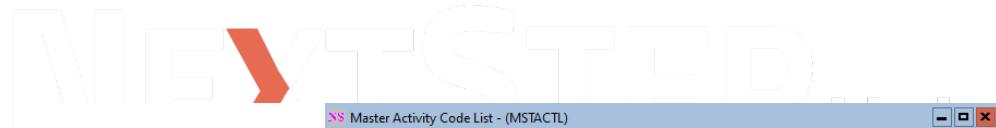
1. From within the Master Activity Code List, click the **Srv Rates** button.

VFO

SS Master Activity Code List - (MSTACTL)

<input checked="" type="radio"/> By Act Code ID	<input type="radio"/> By Act Code Desc																																																								
Locator	90791																																																								
<table border="1"> <thead> <tr> <th>Act Code ID</th> <th>Activity Code Description</th> <th>Type</th> <th>Group</th> </tr> </thead> <tbody> <tr><td>90791</td><td>INITIAL EVALUATION</td><td>D</td><td>N</td></tr> <tr><td>90792</td><td>Psych diag eval w/med services</td><td>D</td><td>N</td></tr> <tr><td>90832</td><td>Base Ind Therapy 30min</td><td>D</td><td>N</td></tr> <tr><td>90833</td><td>Psychotherapy w/ E&M Services</td><td>D</td><td>N</td></tr> <tr><td>90834</td><td>Ind psychotherapy, Pt and family, 45 min</td><td>D</td><td>N</td></tr> <tr><td>90836</td><td>Psychotherapy w/ E&M Services</td><td>D</td><td>N</td></tr> <tr><td>90837</td><td>Ind psychotherapy, 60 min</td><td>D</td><td>N</td></tr> <tr><td>90839</td><td>Psychotherapy for crisis, initial 60 min</td><td>D</td><td>N</td></tr> <tr><td>90840</td><td>Crisis Services Each Addl 30 Mins</td><td>D</td><td>N</td></tr> <tr><td>90846</td><td>Family Counseling w/o pt</td><td>D</td><td>N</td></tr> <tr><td>90847</td><td>Family Counseling w/ pt</td><td>D</td><td>N</td></tr> <tr><td>90849</td><td>IBHRS: Multiple-Family group psychothera</td><td>D</td><td>N</td></tr> <tr><td>90853</td><td>Group psychotherapy</td><td>D</td><td>N</td></tr> </tbody> </table>		Act Code ID	Activity Code Description	Type	Group	90791	INITIAL EVALUATION	D	N	90792	Psych diag eval w/med services	D	N	90832	Base Ind Therapy 30min	D	N	90833	Psychotherapy w/ E&M Services	D	N	90834	Ind psychotherapy, Pt and family, 45 min	D	N	90836	Psychotherapy w/ E&M Services	D	N	90837	Ind psychotherapy, 60 min	D	N	90839	Psychotherapy for crisis, initial 60 min	D	N	90840	Crisis Services Each Addl 30 Mins	D	N	90846	Family Counseling w/o pt	D	N	90847	Family Counseling w/ pt	D	N	90849	IBHRS: Multiple-Family group psychothera	D	N	90853	Group psychotherapy	D	N
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<input type="button" value="Srv Rates"/> <input type="button" value="Ins Coverage"/> <input type="button" value="Act Code Ins Exclusion"/> <input type="button" value="Act Code Groups"/> <input type="button" value="Unbundled Act Codes"/>																																																									
<input type="button" value="Rev Code Override By Diag"/> <input type="button" value="Rev Code Override By Ins"/> <input type="button" value="TOB By Ins"/> <input type="button" value="Ok"/> <input type="button" value="Cancel"/>																																																									

VPO



Master Activity Code List - (MSTACTL)

Locator: 90791

By Act Code ID (radio button selected)

By Act Code Desc (radio button)

Act Code ID	Activity Code Description	Type	Group
90791	INITIAL EVALUATION	D	N
90792	Psych diag eval w/med services	D	N
90832	Base Ind Therapy 30min	D	N
90833	Psychotherapy w/ E&M Services	D	N
90834	Ind psychotherapy, Pt and family, 45 min	D	N
90836	Psychotherapy w/ E&M Services	D	N
90837	Ind psychotherapy, 60 min	D	N
90839	Psychotherapy for crisis, initial 60 min	D	N
90840	Crisis Services Each Addl 30 Mins	D	N
90846	Family Counseling w/o pt	D	N
90847	Family Counseling w/ pt	D	N
90849	IBHRS: Multiple-Family group psychothera	D	N
90853	Group psychotherapy	D	N

Buttons: Att Rates, Srv Rates (highlighted with a red box), Ins Coverage, Program Edits, Act Code Groups, TOB By Ins, Unbundled Act Codes, Ok, Cancel, Act Code Ins Exclusion, Rev Code Override By Diag, Rev Code Override By Ins

- Click the **Ok** button in the Activity Code Rate List for Services window.
- Click the **Add** button.
- Select the **Activity Code**.
- Select the **Agency ID**.

Note: If you have multiple Agencies (multiple Tax IDs) then you will need to add a rate for each Agency for each Activity Code.

- Select the **Discipline** you want to set the Service rate for.
- Enter the **Rate** for the Activity Code for the selected Discipline.
- (Optional) Enter **Effective From** and **Effective To** dates.
- Select the **Allow Service For This Discipline** checkbox. If left unchecked, you will get a Bill Status error when converting Services into Line Items.

VFO

Activity Code Rate Form For Services - (ACTSRTL)

Activity Code	90791	INITIAL EVALUATION
Agency ID	1	Primary Agency
Discipline	1	Provider
Rate(\$)	200.00	
Effective From		
Effective To		
<input checked="" type="checkbox"/> Allow Service For This Discipline?		<input type="button" value="Override By Proc Code"/> <input type="button" value="Override By PI Of Cont"/> <input type="button" value="Override By Ins"/>
User Id	mzanley	Control Date/Time 09/27/2024 01:32:59 PM
<input type="button" value="Save"/> <input type="button" value="Revert"/> <input type="button" value="Delete"/> <input type="button" value="Exit (Esc)"/>		<input type="button" value="Save"/> <input type="button" value="Revert"/> <input type="button" value="Delete"/> <input type="button" value="Exit (Esc)"/>
<input type="button" value="1 <"/> <input type="button" value="< <"/> <input type="button" value="> >"/> <input type="button" value="1 >"/>		
1 record loaded		

VPO



10. Click the **Save** button.

Note: Within the Activity Code Rate Form For Services, if you need to set a different Activity Code Service Rate for a particular Insurance, Place of Contact, or Procedure Code, select one of the Override buttons:

- **Override By Proc Code:** Set an override for a specific procedure code.
- **Override By PI Of Contact:** Set an override for a specific place of contact.
- **Override By Ins:** Set an override for a specific insurance payer.

11. Click the **Exit (Esc)** button to return to the Master Activity Code List and proceed to [Step 3: Add Activity Code Insurance Coverage](#).

Step 3: Add Activity Code Insurance Coverage

If an Activity Code is billable for a particular Party Type, there needs to be an entry in the Activity Code Insurance List for that Party Type. Repeat the steps for all Party Types the Activity Code is billable for.

1. From within the Master Activity Code List, click the **Ins Coverage** button.

VFO

Act Code ID	Activity Code Description	Type	Group
90791	INITIAL EVALUATION	D	N
90792	Psych diag eval w/med services	D	N
90832	Base Ind Therapy 30min	D	N
90833	Psychotherapy w/ E&M Services	D	N
90834	Ind psychotherapy, Pt and family, 45 min	D	N
90836	Psychotherapy w/ E&M Services	D	N
90837	Ind psychotherapy, 60 min	D	N
90839	Psychotherapy for crisis, initial 60 min	D	N
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VPO

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Att Rates Srv Rates **Ins Coverage** Program Edits Act Code Groups TOB By Ins Unbundled Act Codes

Ok Cancel Act Code Ins Exclusion Rev Code Override By Diag Rev Code Override By Ins

2. Click the **Ok** button in the Activity Code Insurance List.
3. Click the **Add** button.
4. Select the **Activity Code**.
5. Select the **Party Type** this Activity Code is for.
6. Select the **Billing Rate Code**. This is a hardcoded list of calculation rules for the number of units.
7. Select the **Procedure Code** you want to associate with this Activity Code. [How to Add, Edit, and Delete Procedure Codes](#)
8. *(Optional)* Select a **Modifier** for the Activity Code for this particular Party Type.
9. *(Optional)* Enter the **Screen** amount, which is the allowed amount (fee schedule).
10. *(Optional)* Select the **Skip if Primary** checkbox so that the system skips the primary payer and moves to the secondary payer in the list for this code.
11. *(Optional)* Select the **Stop if Primary** checkbox to apply a Bill Status (Do Not Bill) for primary insurance for this code.
12. Click the **Save** button and proceed to **Step 4: Add Activity Code Billable Place of Service**

Note: Within the Activity Code Insurance Form, if you need to set a different Activity Code Insurance Coverage for a particular insurance payer within a Party Type, select the **Override By Insurance** button > **Ok button** > **Add button** If you need to set a different Screen amount for a specific insurance payer within a Party Type, select the **Screen Override By Ins/Disc** button > **Ok button** > **Add button**. Once finished in one of those screens, click the **Exit (Esc)** button to return to the Activity Code Insurance Form and proceed to the next section.

Step 4: Add Activity Code Billable Place of Service

The last step is to set up the billable Place(s) of Contact (Service) associated with an Activity Code.

1. From within the Activity Code Insurance Form, select **Contacts Billable**.

VFO and VPO

Activity Code Insurance Form - (ACTINSL)

Activity Code: 90791 INITIAL EVALUATION

Party Type: 1 Medicare

Billing Rate Code: 1 Flat Rate Line Item Billable

Procedure Code ID: 90791 Initial

Modifier:

Screen: \$0.00

Auth Required For Billing:

Inactive: Override By Insurance

Skip If Primary: Screen Override By Ins/Disc

Stop If Primary:

User Id: mzanley Control Date/Time: 09/27/2024 02:18:22 PM

Contacts Billable LA Not Billable

Add Edit Delete Exit (Esc) << << >> >> 5 records loaded Insurance List

1. Click the **Ok** button.
2. Click the **Add** button.
3. Select the **Activity Code** you want to set up the billable Place of Service for.
4. Select the **Party Type** this is for.
5. Select the Place of Service from the **Contact** drop-down menu.
6. Select the **Billable As CSW/CP?** checkbox to allow this code to be billable if the clinician is a CSW/CP. If this box is not selected, you will get a Bill Status error when trying to convert Services into Line Items, see [Bill Status 104](#).

VFO and VPO

Contact Types Billable Form - (CONBILL)

Activity Code: 90791 INITIAL EVALUATION

Party Type: 1 Medicare

Contact Type: 11 Office

Place Code # For Invoice:

Billable As Incident To Phys?

Billable As CSW / CP?

Primary Billed Insurance Procedure Code Override:

Non Primary Billed Insurance Procedure Code Override:

Non Primary Insurance Billed As Primary Procedure Code Override:

User Id: mzanley Control Date/Time: 09/27/2024 02:20:54 PM

Add Edit Delete Exit (Esc) << << >> >> 3 records loaded Billable List

2. (Optional) Select a **Primary Billed Insurance Procedure Code Override**, **Non Primary Billed Insurance Procedure Code Override**, and/or **Non Primary Insurance Billed as Primary Procedure Code Override**
3. Click the **Save** button.
4. Click the **Exit (Esc)** button or **X** to close all windows.