Set Up an Activity Code

Last Modified on 09/02/2026 5:25 pm EDT

Path: Maintenance and Setup > Activity Codes > Activity Codes

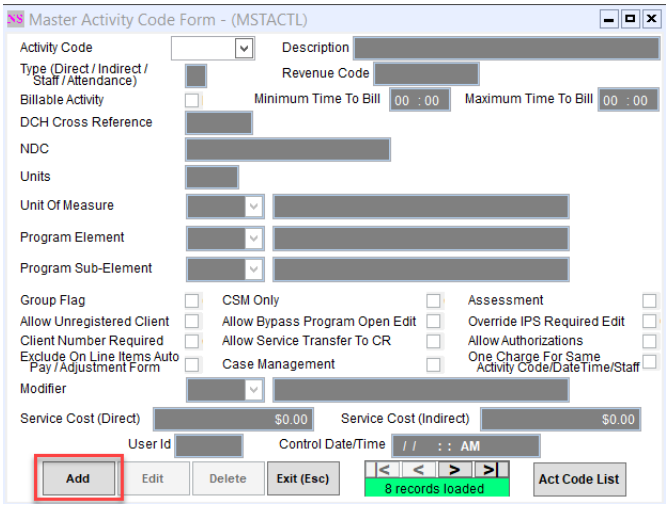
About

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.

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 using the path above.
2. Click the **Ok** button. The Master Activity Code Form is displayed.
3. Click the **Add** button.

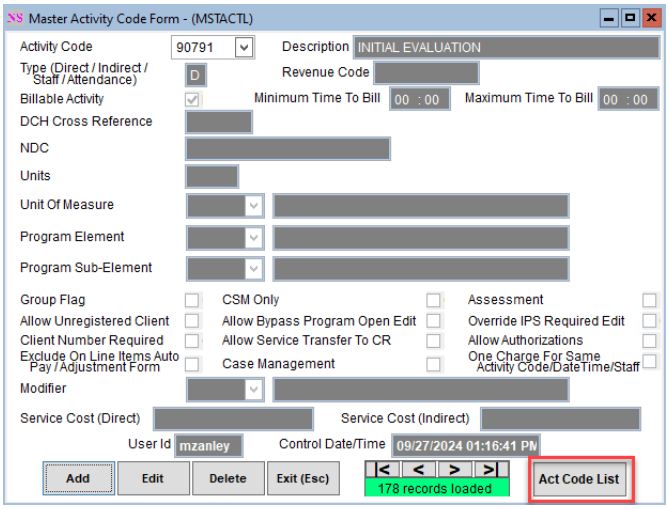


4. Complete the fields below. While there are several items that define an Activity Code, the Code, Description, and Billable Activity are the most commonly used fields. Required fields are marked with an asterisk.

- ***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).
  Note: The Description is what will be seen on the Clinical side in the Activity Code dropdown.
- ***Type (Direct/Indirect/Staff/Attendance)**: D (Direct) is set as default. Do not change.
- *(optional)* **Revenue Code:** Enter a value for Institutional or UB-04 claims. This will only show on institutional claims.
- **Billable Activity**: Select the checkbox to make this Activity Code billable.
- *(optional)* **Minimum** and **Maximum Time 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.
- *(optional)* **NDC Code**: If applicable, enter the National Drug Code, numeric identifier for a medication.

- *(optional)* **Units/Units of Measure**: If applicable, add the units/units of measure for a medication.
- *(optional)* **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**.

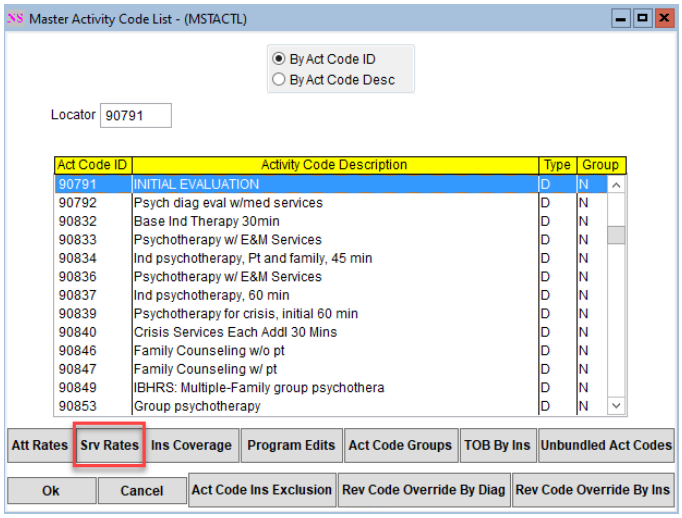
5. Click the **Save** button.
6. Return to the Master Activity Code List by clicking the **Act Code List** button and proceed to **Step 2: Add Activity Code Service Rates**.



Step 2: Add Activity Code Service Rates

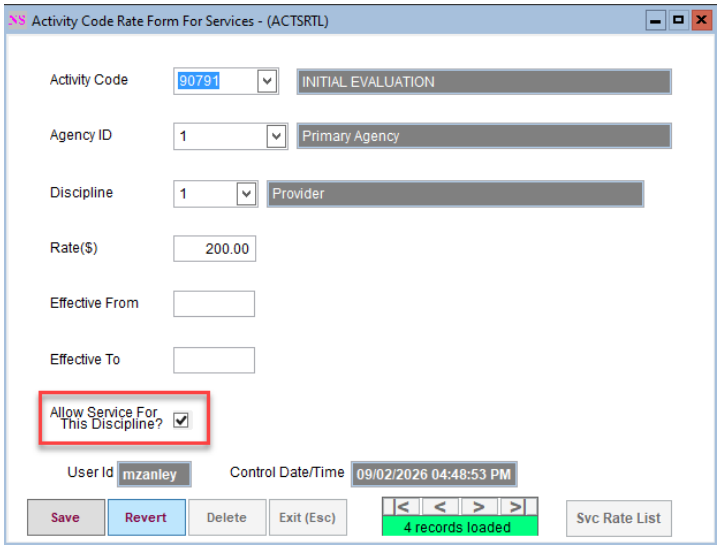
For **each** Agency and Discipline in your billing setup, you will need to set the Service Rate (cost per unit) for the Activity Code.

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



2. Click the **Ok** button in the Activity Code Rate List for Services window.
3. Click the **Add** button.
4. Select the **Activity Code**.
5. Select the **Agency ID**.
6. Select the **Discipline** you want to set the Service rate for.
7. Enter the **Rate** for the Activity Code for the selected Discipline.
8. *(Optional)* Enter **Effective From** and/or **Effective To** dates.
9. Select the **Allow Service For This Discipline** checkbox. If left unchecked, you will get a Bill Status error when converting

Services into Line Items.



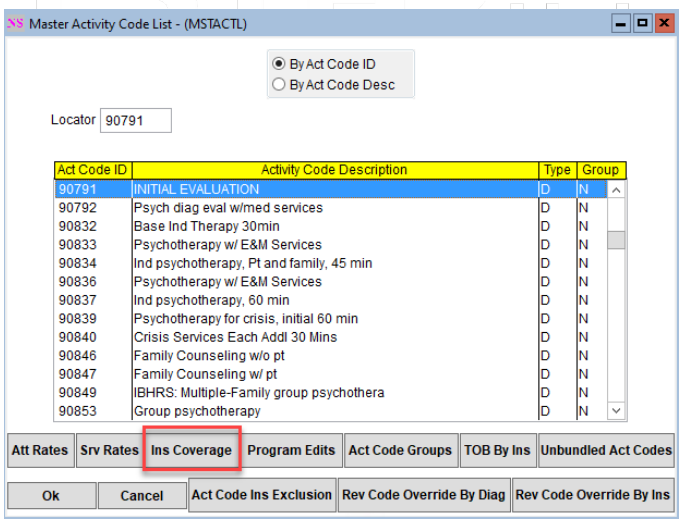
10. Click the **Save** button.
11. Click the **Exit (Esc)** button to return to the Master Activity Code List and proceed to **Step 3: Add Activity Code Insurance Coverage**.

> **Note**: On the Activity Code Rate List For Services, if you need to set a different Activity Code Service Rate for a particular Program (VPO only), Party Type, Insurance, Place of Contact, or Procedure Code, select one of the options from the **Override Selector**:
>
> - **Override By Program**: Set an override for a specific program (VPO billing module versions only).
> - **Override By Party Type**: Set an override for a specific party type umbrella category.
> - **Override By Insurance**: Set an override for a specific insurance payer.
> - **Override By Place Of Contact**: Set an override for a specific place of contact.
> - **Override By Procedure Code**: Set an override for a specific procedure code.

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.



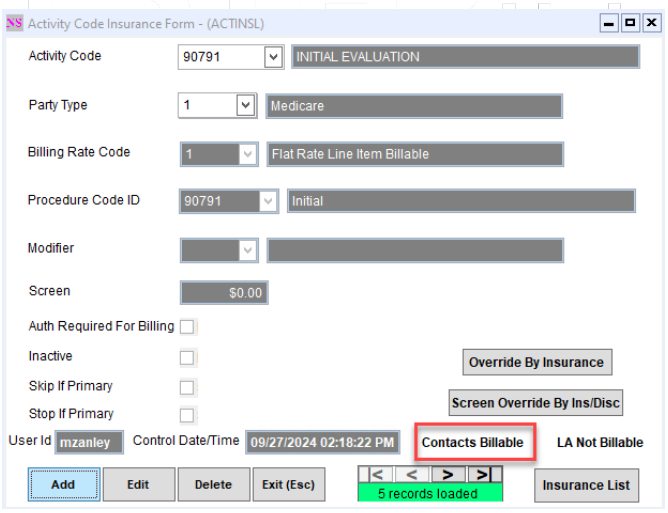
2. Click the **Ok** button in the Activity Code Insurance List.
3. Click the **Add** button.
4. Select the **Activity Code**.
5. Select the **Party Type** this Activity Code is for.
6. Select the **Billing Rate Code**. This is a hardcoded list of calculation rules for the number of units.
7. Select the **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.

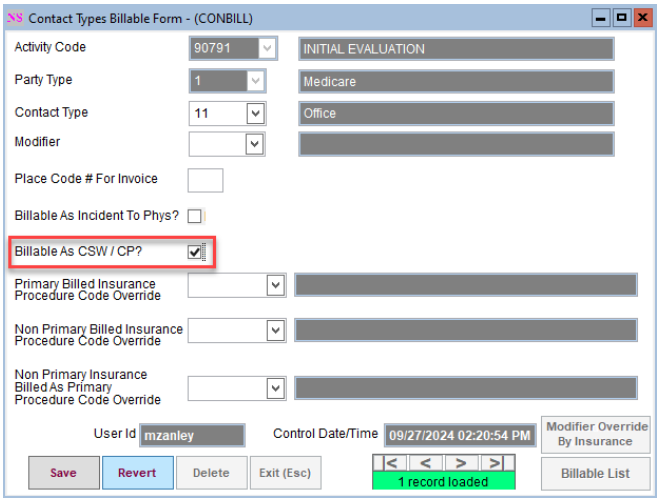
Step 4: Add Activity Code Billable Place of Service

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**.



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 Type** drop-down menu.
6. *(Optional)* Select a Modifier from the drop-down menu if a Place of Service-related modifier is required for this Activity Code/Party Type/Contact Type combination.
7. 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**.



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.

> **Note**: Within the Contact Types Billable Form, if you need to set a different place of service Modifier for a particular insurance payer, select the **Modifier Override By Insurance button > Ok button > Add button**

4. Click the **Exit (Esc)** button or **X** to close all windows.