

Set Up an Activity Code

Last Modified on 05/27/2022 1:19 pm EDT

Path: Maintenance and Setup > Activity Codes > Activity Codes

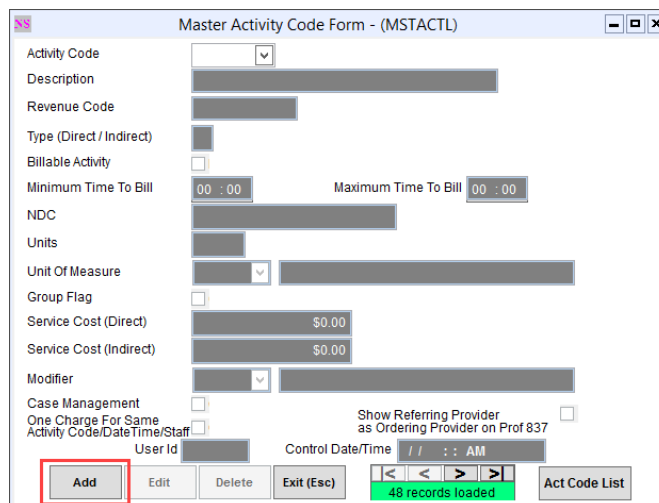
About

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



The screenshot shows the 'Master Activity Code Form - (MSTACTL)' window. It contains the following fields and controls:

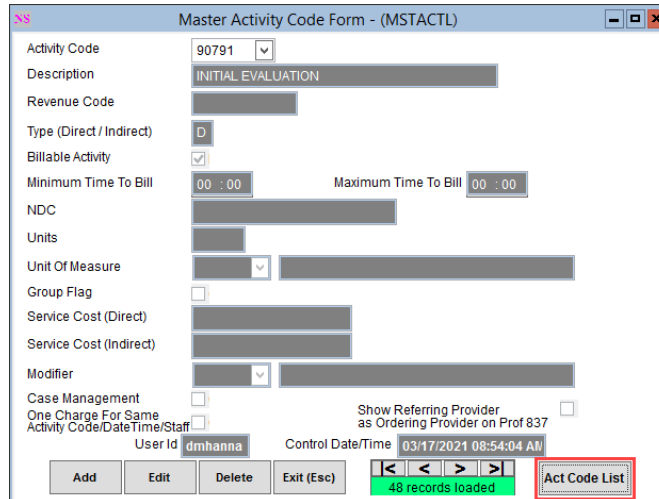
- Activity Code:** A dropdown menu.
- Description:** A text input field.
- Revenue Code:** A text input field.
- Type (Direct / Indirect):** A radio button control.
- Billable Activity:** A checkbox.
- Minimum Time To Bill:** A time input field (00 : 00).
- Maximum Time To Bill:** A time input field (00 : 00).
- NDC:** A text input field.
- Units:** A text input field.
- Unit Of Measure:** A dropdown menu.
- Group Flag:** A radio button control.
- Service Cost (Direct):** A text input field (\$0.00).
- Service Cost (Indirect):** A text input field (\$0.00).
- Modifier:** A dropdown menu.
- Case Management:** A checkbox.
- One Charge For Same Activity Code/Date/Time/Staff:** A checkbox.
- Show Referring Provider as Ordering Provider on Prof 837:** A checkbox.
- User Id:** A text input field.
- Control Date/Time:** A date and time input field (/ / : : AM).
- Buttons:** Add (highlighted with a red box), Edit, Delete, Exit (Esc).
- Footer:** Navigation arrows, '48 records loaded', and 'Act Code List' 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.

- **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).
- **Revenue Code:** Enter a value for Institutional/UBs claims. This will only show on institutional claims.
- **Type (Direct/Indirect):** D (Direct) is set as default. Do not change.
- **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](#).

- Click the **Save** button.
- Return to the Master Activity Code List by clicking the **Act Code List** button and proceed to [Step 2: Add Activity Code Service Rates](#).

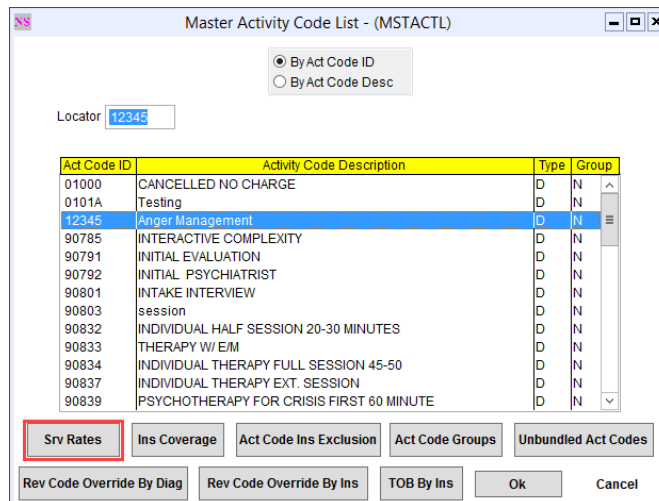


The screenshot shows the 'Master Activity Code Form - (MSTACTL)' window. It contains various fields for defining an activity code, such as 'Activity Code' (90791), 'Description' (INITIAL EVALUATION), 'Revenue Code', 'Type (Direct / Indirect)' (D), 'Billable Activity' (checked), 'Minimum Time To Bill' (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/Date/Staff', and 'Show Referring Provider as Ordering Provider on Prof 837'. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Exit (Esc)', and 'Act Code List'. A status bar at the bottom indicates '48 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.

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



The screenshot shows the 'Master Activity Code List - (MSTACTL)' window. It has a 'Locator' field with the value '12345'. Below it is a table with columns 'Act Code ID', 'Activity Code Description', 'Type', and 'Group'. The table lists various activity codes, with '12345' highlighted. At the bottom, there are buttons for 'Srv Rates', 'Ins Coverage', 'Act Code Ins Exclusion', 'Act Code Groups', 'Unbundled Act Codes', 'Rev Code Override By Diag', 'Rev Code Override By Ins', 'TOB By Ins', 'Ok', and 'Cancel'. The 'Srv Rates' button is highlighted with a red box.

Act Code ID	Activity Code Description	Type	Group
01000	CANCELLED NO CHARGE	D	N
0101A	Testing	D	N
12345	Anger Management	D	N
90785	INTERACTIVE COMPLEXITY	D	N
90791	INITIAL EVALUATION	D	N
90792	INITIAL PSYCHIATRIST	D	N
90801	INTAKE INTERVIEW	D	N
90803	session	D	N
90832	INDIVIDUAL HALF SESSION 20-30 MINUTES	D	N
90833	THERAPY W/E/M	D	N
90834	INDIVIDUAL THERAPY FULL SESSION 45-50	D	N
90837	INDIVIDUAL THERAPY EXT. SESSION	D	N
90839	PSYCHOTHERAPY FOR CRISIS FIRST 60 MINUTE	D	N

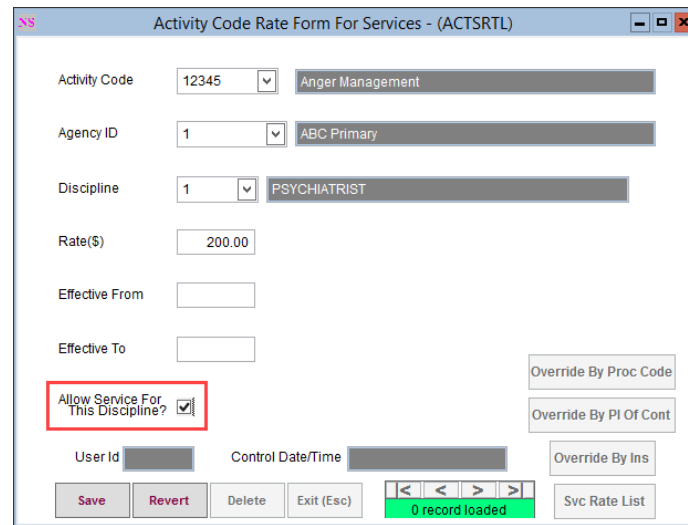
- Click the **Ok** button in the Activity Code Rate List for Services window.
- Click the **Add** button.
- Select the **Activity Code**.
- Select the **Agency ID**.



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.

7. Enter the **Rate** for the Activity Code for the selected Discipline.
8. *(Optional)* Enter **Effective From** and **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.

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:

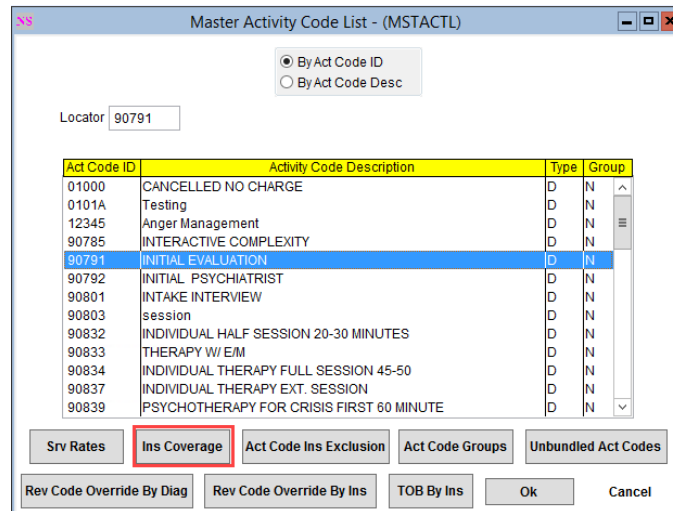
- **Override By Proc Code:** Set an override for a specific procedure code.
- **Override By PI Of Contact:** Set an override for a specific place of contact.
- **Override By Ins:** Set an override for a specific insurance payer.

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.



Master Activity Code List - (MSTACTL)

☒ By Act Code ID
☐ By Act Code Desc

Locator: 90791

Act Code ID	Activity Code Description	Type	Group
01000	CANCELLED NO CHARGE	D	N
0101A	Testing	D	N
12345	Anger Management	D	N
90785	INTERACTIVE COMPLEXITY	D	N
90791	INITIAL EVALUATION	D	N
90792	INITIAL PSYCHIATRIST	D	N
90801	INTAKE INTERVIEW	D	N
90803	session	D	N
90832	INDIVIDUAL HALF SESSION 20-30 MINUTES	D	N
90833	THERAPY W/ E/M	D	N
90834	INDIVIDUAL THERAPY FULL SESSION 45-50	D	N
90837	INDIVIDUAL THERAPY EXT. SESSION	D	N
90839	PSYCHOTHERAPY FOR CRISIS FIRST 60 MINUTE	D	N

Srv Rates **Ins Coverage** Act Code Ins Exclusion Act Code Groups Unbundled Act Codes

Rev Code Override By Diag Rev Code Override By Ins TOB By Ins Ok Cancel

- Click the **Ok** button in the Activity Code Insurance List.
- Click the **Add** button.
- Select the **Activity Code**.
- Select the **Party Type** this Activity Code is for.
- Select the **Billing Rate Code**. This is a hardcoded list of calculation rules for the number of units.
- Select the **Procedure Code** you want to associate with this Activity Code.
- (Optional) Select a **Modifier** for the Activity Code for this particular Party Type.
- (Optional) Enter the **Screen** amount, which is the allowed amount (fee schedule).
- (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.
- (Optional) Select the **Stop if Primary** checkbox to apply a Bill Status (Do Not Bill) for primary insurance for this code.
- Click the **Save** button and proceed to **Step 4: Add Activity Code Billable Place of Service**

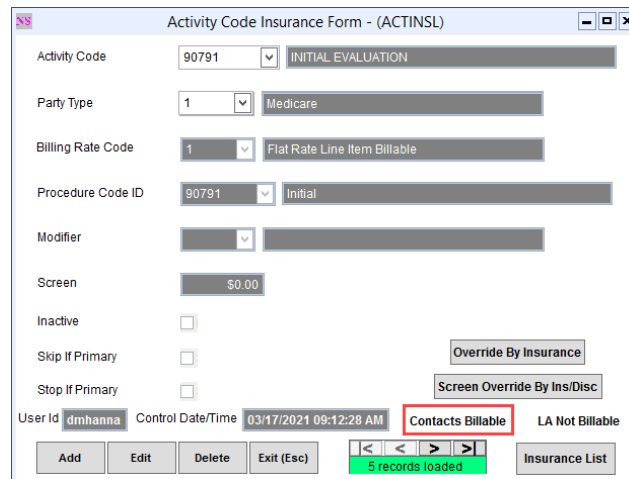


Note: Within the Activity Code Insurance Form, if you need to set a different Activity Code Insurance Coverage for a particular insurance payer within a Party Type, select the **Override By Insurance button > Ok button > Add button**. If you need to set a different Screen amount for a specific insurance 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.

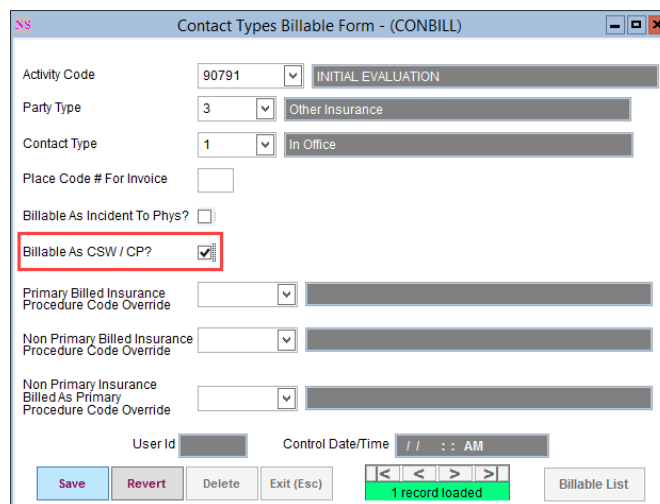
Step 4: Add Activity Code Billable Place of Service

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

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



2. Click the **Ok** button.
3. Click the **Add** button.
4. Select the **Activity Code** you want to set up the billable Place of Service for.
5. Select the **Party Type** this is for.
6. Select the Place of Service from the **Contact** drop-down menu.
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](#).



8. (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**.
9. Click the **Save** button.
10. Click the **Exit (Esc)** button or **X** to close all windows.