Set Up Procedure Code for Institutional Claims

Last Modified on 01/21/2026 10:48 am EST

Path: Maintenance and Setup > Procedure Codes > Procedure Codes

About

Specific Procedure Codes can be set up so that they are sent to all payers institutionally rather than professionally. Or, some payers may want to see the Procedure Code professionally while others want it to be filed institutionally. Steps on how to set up Procedure Codes for these two scenarios are found below.

> **Note**: A Revenue Code is needed if filing an Institutional claim and can be added in the Master Activity Code Form. See **Setup an Activity Code** for more detail on where to add this.

In this article:

- Set Up Procedure Code as Institutional for All Payers
- Set Up Procedure Code as Institutional for Some Payers

Set Up Procedure Code as Institutional for All Payers

1. Navigate to the Master Procedures Codes List by following the path above.
2. Select the Procedure Code you wish to edit, and click the **Ok** button. If you are adding a Procedure Code for the first time, follow the steps **here**.
3. Click the **Edit** button.
4. In the **837 Format (P/I/D)** field enter "I" for institutional.

5. *(Optional)* Select the **CLIA ID Required** checkbox to have the CLIA ID displayed on claims for the CPT Code.
6. Click the **Save** button.

> **Note**: When you go to file an 837, select Institutional from the Transaction Set drop-down menu in order for any Activity Codes with this Institutional procedure code to send.
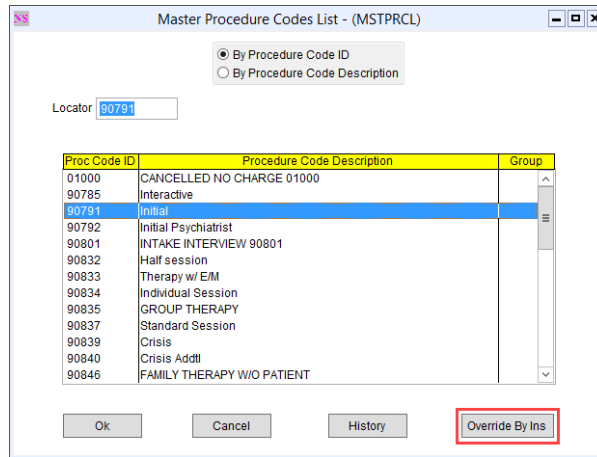
Set Up Procedure Code as Institutional for Some Payers

Add a new Procedure Code as you normally would by following the steps **here**, and set the 837 Format (P/I/D) field to a P for professional. Next, follow the steps below to add insurance-level Procedure Code institutional overrides.

1. Navigate to the Master Procedure Codes List: **Maintenance and Setup > Procedure Codes > Procedure Codes.**
2. Click the **Override by Ins** button.

3. Click the **Ok** button.
4. Click the **Add** button.
5. From the **Proc Code ID** drop-down menu, select the Procedure Code you want to set up as institutional.
6. From the **Insurance** drop-down menu, select the Insurance Payer this override is applicable to.
7. In the **837 Format** field, type "I" for institutional.

> **Note**: When you go to file an 837, select Institutional from the Transaction Set drop-down menu in order for any Activity Codes with this institutional procedure code to send.