

Next Step... 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.

The screenshot shows the 'Master Procedure Codes Form - (MSTPRCL)' window. The 'Procedure Code' dropdown is set to '90791'. The 'Description' field contains 'Initial'. The '837 Format (P/I/D)' field is highlighted with a red box and contains 'I'. Other fields include 'Code Xref', 'Group', 'CLIAID Required' (checkbox), and 'Don't Bundle' (checkbox). The bottom of the window shows the user 'jdougher', control date/time '05/11/2022 01:55:03 PM', and a status bar with '75 records loaded'.

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.

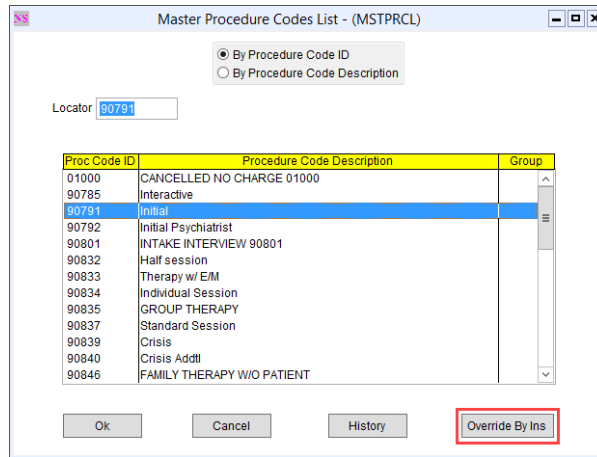
Set Up Procedure Code as Institutional for Some Payers



NEXT STEPS


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.



Proc Code ID	Procedure Code Description	Group
01000	CANCELLED NO CHARGE 01000	
90785	Interactive	
90791	Initial	
90792	Initial Psychiatrist	
90801	INTAKE INTERVIEW 90801	
90832	Half session	
90833	Therapy w/ E/M	
90834	Individual Session	
90835	GROUP THERAPY	
90837	Standard Session	
90839	Crisis	
90840	Crisis Addtl	
90846	FAMILY THERAPY W/O PATIENT	

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.

