

Services Bundler

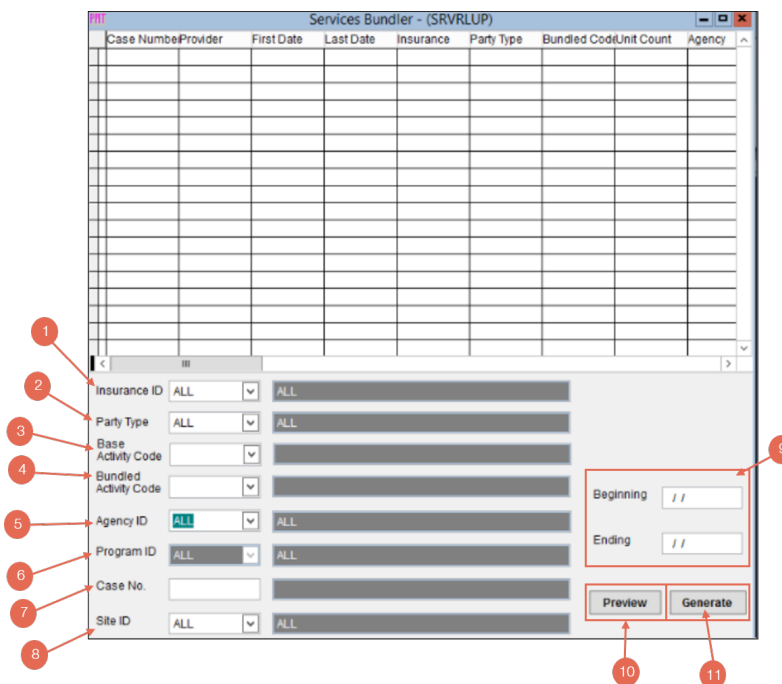
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Path: File > Services > Services > Services - Bundle

About

The Service Bundler Tool uses the data entered into the Activity Code Bundle form and uses it to create a new billable service for open Line items associated with the base activity code.

Services Bundler



Number	Section	Description
1	Insurance ID	This gives you a drop down of all Insurance IDs. Select the Insurance ID of the line items you would like to bundle into a new bundled service.
2	Party Type	This gives you a drop down of all Party Types. Select the Party type of the line items you would like to bundle into a new Bundled Service.
3	Base Activity Code	This gives you a drop down of All Activity Codes. Select the Activity code that is associated with line items you are bundling into a new bundled service.
4	Bundled Activity Code	This gives you a drop down of All Activity Codes. Select the Bundled Activity code that will be associated with the new bundled service, based on the Activity Code Rollup (or Bundle) set up.
5	Agency ID	This gives you a drop down of all the Agencies in NSS Billing. Select the agency that is associated with the line items you are bundling into a new bundled service.

6	Program ID	This gives you a drop down of all the Programs associated with the Agency that is populated in the Agency field. This drop down only becomes active if an Agency is chosen. Select the Program that is associated with the line time you are bundling into a new bundled service.
7	Case No.	This is a free text field to enter the case no for a client associated with the line items you are bundling into a new bundled service.
8	Site ID	This gives you a drop down of all the Locations in NSS Billing. Select the Site ID that is associated with the line items you are bundling into a new bundled service.
9	Beginning and Ending Date fields	These fields allow you to enter a date range for the line items you want bundled into the new bundled service. One bundled service will be created for the line items associated with the date range entered. Unless the Daily checkbox is checked in the Activity Code form, then one bundled service will be created per day for the date range entered if a line item exists for that day.
10	Preview Button	After entering the appropriate data into the fields in the Service Bundle tool, clicking this button will show you a preview of the new service/services in the top grid.
11	Generate Button	After entering the appropriate data into the fields in the Service Bundle tool, clicking this button will generate the new bundled service. Clicking the Generate button will also Close the line items that were bundled into the new service.