# Bundle Services Overview

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## About

Bundle Services lets NextStep Billing users combine multiple Activities or Services into a single Bundled service for billing. Review the topics below before using the Activity Code Bundle Setup.

### Base vs. Bundled Activity Code

Each bundle needs two types of Activity Codes:

- **Base Activity Code**: the code the provider selects in NextStep Clinical.
- **Bundled Activity Code**: a separate code used only in NextStep Billing to identify the bundled service.

Setup requirements:

- Both Activity Codes must be configured to pass through Services Recalc, including Service Rates, Insurance Coverage, and Contacts Billable. See Set Up an Activity Code
- The Base Activity Code does not need a rate.
- The Bundled Activity Code must have a different name from the Base Activity Code.
- Do not add the Bundled Activity Code to the Clinical billing setup. It is used only in Billing.

### Bundling Services

Base Activity Code services are not billed on their own. Instead, they are held until you combine them into a single Bundled service in the Services Preprocessor. The Bundled service is what gets billed, and the original Base line items are closed.

What happens automatically:

1. A service for a Base Activity Code comes to NextStep Billing from NextStep Clinical.
2. When Services Recalc runs, the Base line item is created with **Print Status = N** (will not be sent on an 837). The line stays open until the bundled line is created.

Creating the bundled service:

1. Confirm that every service to be bundled has passed Services Recalc and shows a **Bill Status of 0** (the line passed all billing edits).
2. Open the **Services Preprocessor**. *Learn more about the Services Preprocessor here.*
3. Enter Date filters and then click **Preview** and spot-check the lines to be bundled to make sure they look accurate.
4. Click **Generate**. This creates the Bundled service(s) and **closes** the Base line items.
5. Run **Services Recalc** on the new Bundled service(s). This runs the standard Recalc checks and creates a line item if it shows a Bill Status of 0.

**If the Bundled service doesn't pass Recalc:** Treat it like any other Recalc failure. Fix the issue shown by the Bill Status code and recalc again. You don't need to regenerate the bundle.