

NEWTSTED

Services Preprocessor

Last Modified on 09/04/2024 4:41 pm EDT

Path: File > Services > Services > Services - Preprocessor Form

About

The Services Preprocessor Form uses the rules entered into the [Activity Code Bundle Setup](#) to create a new billable service for open Line items associated with the **Base Activity Code**.

The only required filters are the **Beginning** and **Ending** date range. Other filter options are available by clicking the **Filters** button. The Services Preprocessor will only combine services within the entered date range so be sure to be exclusive or inclusive here.



Services that have a Base Activity Code added to the Activity Code Bundle Setup must have a Bill Status of 0 to appear in the Services Preprocessor previewed list. The user must Recalc in the Services Form **before** Generating in the Services Preprocessor.



The screenshot shows the 'Services Preprocessor' application window. At the top, there are input fields for 'Beginning' (05/01/2024) and 'Ending' (05/31/2024), a 'Filters' button, and 'Preview' and 'Generate' buttons. Below these is a section titled 'Records To Be Bundled' with a table containing two rows of data. A yellow box below the table indicates '2 Record(s) found.' Below this is a section titled 'Base Records' with a table containing one row of data. A yellow box below this table indicates '1 Record(s) found.'

Client ID	First Date	Last Date	Base Code or Group	Base Description
4420	05/12/2024 10:00:00 AM	05/12/2024 10:30:00 AM	9302	AOD Sub-Acute Detox OutPt
4420	05/12/2024 10:00:00 AM	05/12/2024 10:30:00 AM	9302	AOD Sub-Acute Detox OutPt

Client Name	Start Date	End Date	Base Code	Base Description	Ur
Molly Test	05/12/2024 10:00:00 AM	05/12/2024 10:30:00 AM	9302	AOD Sub-Acute Detox OutPt	30

Preview in the Services Preprocessor

After entering your Filters, click **Preview**.

The form displays two grids:

- The top grid, labeled **Records To Be Bundled** shows the final/substituted codes.
- The bottom grid, labeled **Base Records** displays which Line Items are included in the Records To Be Bundled.

Generate in the Services Preprocessor

After reviewing the Previewed Records, click **Generate**. A pop-up will let you know how many Records have been Generated.

⚠ To complete the process for the new Bundled Activity Code, the Services must be Recalced to a Bill Status of 0 to create a Line Item for the Bundled Activity Code.



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