Correct Bundled and Base Line Items

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> **Path: File > Billing > Line Items**

About

If your agency uses the Bundling Workflow, you may need to correct a Line Item that was bundled by the Services Preprocessor.

- **"Bundled" Line Items** can be edited, but we recommend deleting and recreating them instead. Recreating the bundle makes sure all information tied to the bundle activity code updates correctly.
- **"Base" Line Items** can never be edited. To fix an error that comes from a "Base" Service, delete the related Line Items first. Then you can edit the "Base" Service.

This workflow requires Security Permissions in NextStep Billing. If you're not sure whether you have this permission, contact your administrator or NextStep Support.

Deleting Line Items

1. Each workflow below uses these steps to delete Line Items. You can delete several Line Items at once or one at a time.

   Option A: Multi-select (recommended)

   1. In the **Line Items List** grid, check the box next to each Line Item you need to delete.
   2. Click **Delete**.
   3. Confirm the deletion when prompted.

   Option B: One at a time

   1. Select a Line Item and click **Ok**.
   2. When the **Line Items Form** opens, click **Delete**.
   3. Click the **Line Items List** button to go back to the grid.
   4. Repeat for each Line Item you need to delete.

Correct a "Bundled" Line Item

Delete and recreate the "Bundled" Line Item instead of editing it. This way, all information connected to the bundle activity code updates correctly.

1. Using the navigation path above, open the **Line Items List**.
2. Enter your Line Item Form Filters.
3. Delete the "Bundled" Line Items that need to be corrected (see **Deleting Line Items** above).
4. Navigate to the **Services Form**.
5. Enter your Services Form Filters.
6. Select the "Bundled" Service that needs to be corrected and click **Delete**.
   - **Note:** This automatically reopens the "Base" Line Items. They must be Open to appear in the Services Preprocessor.
7. Continue with the Services Preprocessor workflow to recreate the bundle.

Fix a "Base" Service

Use this when the error comes from one of the “Base” Services in the bundle, for example a wrong date, units, or service code. “Base” Line Items can never be edited, so delete the “Bundled” and “Base” Line Items first. Then correct the “Base” Service.

1. Using the navigation path above, open the **Line Items List**.
2. Enter your Line Item Form Filters.
3. Delete the “Bundled” Line Item and all of its “Base” Line Items (see **Deleting Line Items** above).
    - **Tip:** With multi-select, you can select the “Bundled” and “Base” Line Items together and delete them all at once.
4. Navigate to the **Services Form**.
5. Enter your Services Form Filters.
6. Select the “Bundled” Service and click **Delete**.
7. Select the “Base” Service that needs to be corrected, make your changes, and click **Save**.
8. Repeat step 7 for any other “Base” Services that need correcting.
9. Continue with the Services Preprocessor workflow.

Alternative Workflow for Pre-Existing Data (Before the 7.12.1 Release)

For data bundled before the 7.12.1 Release (5/5/25), deleting the “Bundled” Service does not reopen the “Base” Line Items, so they must be deleted as well.