

# NextStep... Import Activity Code Service Rates in Bulk

Last Modified on 01/08/2026 8:45 pm EST

**Path: Maintenance and Setup > Imports > Activity Code Service Rates**

## About

This import will enable NextStep Billing users to import new service rates in bulk. Review the steps below to complete the import without error.

## Step 1: Make a copy of the attached template

- **Activity Code Services Rates Import | TEMPLATE - MAKE A COPY**
  - Use this template to enter the Activity Codes, Agency(s), Discipline(s), and Rates that require new service rates.

The screenshot shows two side-by-side windows. The left window is the 'Master Activity Code List - (MSTACTL)' application. It has a menu bar (File, Edit, Maintenance and Setup, Utilities, Reports, Window, Help) and a toolbar. The main area contains a form with 'Act Code Selector' set to '90791' and 'INITIAL EVALUATION'. Below this are 'Agency Selector' (ALL) and 'Agency Locator' (2). There are radio buttons for 'By Agency / Discipline Code' (selected) and 'By Agency / Discipline Description'. A table at the bottom lists activity codes, agencies, disciplines, rates, and 'Allow Svc' status. The right window is a Google Sheets spreadsheet titled 'Copy of Activity Code Services Rates Import | TEMPLATE - MAKE...'. It has a menu bar (File, Edit, View, Insert, Format, Data, Tools, Extensions, Help, Gemini) and a toolbar. The spreadsheet has columns A through G: Activity Code, Agency, Discipline Code, Rate, Eff From, Eff To, and Allow Svc. It contains data for Activity Code 90791 across two agencies (1 and 2) for two disciplines (Doctor and Licensed Psychologist) with different rates.

Activity Code	Agency	Discipline Code	Rate	Eff From	Eff To	Allow Svc
90791	1	2	265.00			TRUE
90791	1	3	230.00			TRUE

In the example pictured above, I want to increase the rates for the Activity Code 90791 for both Agency 1 and 2, as well as for the Doctor and the Licensed Psychologist. In this case, the two disciplines have different rates.

- Rules to keep in mind while filling out the template:
  - Activity Codes, Agency, and Discipline Codes listed in the spreadsheet must already exist in NextStep Billing.
  - If the Discipline Codes listed in the template spreadsheet currently exist, they will override and replace the existing disciplines and rates for that Activity Code.
  - For efficiency, all agencies and/or disciplines for the specified activity codes should be listed on a single line with a single space between if listing multiple agencies or disciplines.
  - The "Allow Svc" column should be formatted as TRUE or FALSE. You will likely want to use "TRUE" to allow services for the listed disciplines.

## Step 2: Create a CSV File

After entering the information to import from Step 1, create a CSV file.

- In Google Sheets, click File > Download > Comma Separated Values (.csv).
- The CSV file can be opened from your Downloads folder.

## Step 3: Scrub the CSV File before importing

- Open the CSV file from your Downloads and review the following formatting requirements:
  - Remove any currency formatting



# NextStep Billing

- Remove all commas
- Remove the header or any added columns that are not a part of the original template

	A	B	C	D	E	F	G
1	90971	1 2	2	265			TRUE
2	90971	1 2	3	230			TRUE
3							

- After the formatting is complete, save the file.

## Step 4: Upload your CSV File into Parallels/NextStep Billing

- In NextStep Billing, upload the CSV file to your customer folder
  - Click the Upload button on the bottom right side of your Parallels screen. Select your saved CSV file, then click Open
  - Next, you'll be prompted with a "Save As" pop-up. Navigate to your customer folder by following this path:
    - This PC > Local Disc C: > Program Files (x86) > Customer > customer name
    - \*Use this article for more information about [Uploading Using Parallels](#)

## Step 5: Import your records

Navigate to Maintenance and Setup > Import > Activity Code Service Rates

- Click Start and open the uploaded file
- After opening the file, you will see accepted lines or unaccepted lines that will be highlighted in red. If there are no red lines, click Import
  - After importing, there will be a pop-up letting you know "Process complete! X files have been imported."
  - You can exit the form.
- If there are red highlighted errors, the validation error must be corrected on the CSV spreadsheet and then reuploaded to NextStep Billing to try the import again. (Repeat steps 3-5)
  - Possible validation errors:
    - Duplicates in CSV
    - The Activity Code in CSV does not exist in billing
    - The Agency in CSV does not exist in billing
    - The Discipline Code in CSV does not exist in billing
    - Effective To date is before the Effective From date
    - Any overlapping of the Effective Date ranges with an existing override for the same agency/activity/discipline (including entirely nested dates)
      - Note: An empty From Effective Date will be treated as always in effect until the To Effective Date. An empty To Effective Date will be treated as never-ending.

In this example, the Activity Code was mistyped as "90971" instead of "90791"; therefore, the system does not recognize the Activity Code.



	A	B	C	D	E	F	G
1	90791	1 2	2	265			TRUE
2	90791	1 2	3	230			TRUE
3							

I fixed the Activity Code in the Excel CSV file and saved it. Then, I reuploaded the file to Parallels.

**PPT IMPORT ACTIVITY CODE SERVICE RATE**

Activity Codes	Agencies	Discipline Codes	Rate	Eff From	Eff To	Allow Svc	Record ID	Notes
90791	1 2	2	265.0000			TRUE	1	
90791	1 2	3	230.0000			TRUE	2	

Microsoft Visual FoxPro

Process complete! 4 records have been imported.

OK

Start Exit Rows: 2 Records: 4 C:\PROGRAM FILES (X86)\CUSTOMER\ \_VPO\_BILLINGTESTUSEME\6038 IMF Import

The file was without error, so I could click Import and receive the confirmation pop-up.

Note: **Rows** are the number of individual rows on this import screen, while **Records** is the count of each record being inserted into the Service Rate setup.

**Master Activity Code List - (MSTACTL)**

**Activity Code Rate List For Services - (ACTSRTL)**

Act Code Selector: 90791 INITIAL EVALUATION

Agency Selector: ALL ALL

Agency Locator: 2

Discipline Locator: 3

☒ By Agency / Discipline Code  
☐ By Agency / Discipline Description

Agency	Discipline Code / Description	Rate	Eff From	Eff To	Allow Svc
1	2 Doctor	\$ 265.00			Yes
1	3 Licensed Psychologist	\$ 230.00			Yes
2	2 Doctor	\$ 265.00			Yes
2	3 Licensed Psychologist	\$ 230.00			Yes

Ok Cancel Override Selector

Finally, I confirm my import details by spot-checking the records in the Activity Code Rate List For Services matches my imported information.

# NEXT STEP...

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