Import Activity Code Service Rates in Bulk

Last Modified on 08/14/2026 5:35 pm EDT

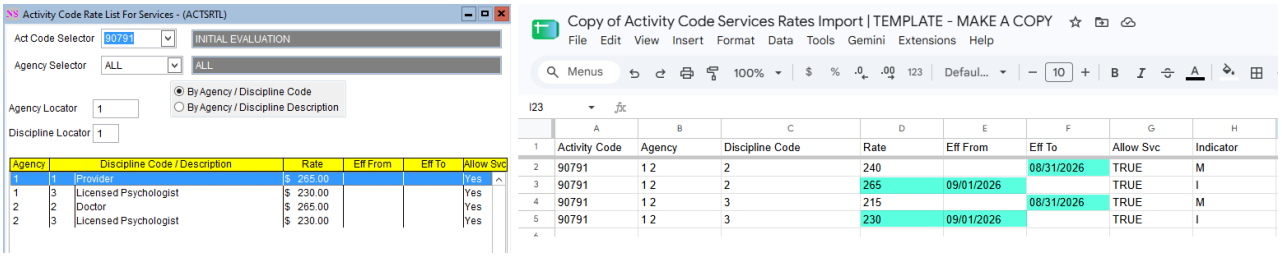
Path: Maintenance and Setup > Imports > Activity Code Service Rates

About

This import enables 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 or updated service rates.



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.

The green highlights show what is being changed. Lines 2 and 4 of the spreadsheet show what is being modified in an existing billing record, and lines 3 and 5 show what is being inserted.

- 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.
  - 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.
  - The "Indicator" column should be formatted with an "A", "M", or "I".
    - A (Add): Adds a brand-new record for an activity code, agency, and discipline combination that does not already exist in the system.
    - M (Modify): Modifies an existing activity codes with an **Effective To** date.
    - I (Insert): Inserts a new entry for an existing activity code with an updated **Rate** and new **Effective From** date.
    - Note: "M" and "I" should be used in unison.

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

	A	B	C	D	E	F	G	H
1	90791	1 2	2	240		8/31/2026	TRUE	M
2	90791	1 2	2	265	9/1/2026		TRUE	I
3	90791	1 2	3	215		8/31/2026	TRUE	M
4	90791	1 2	3	230	9/1/2026		TRUE	I

- After the formatting is complete, save the file.

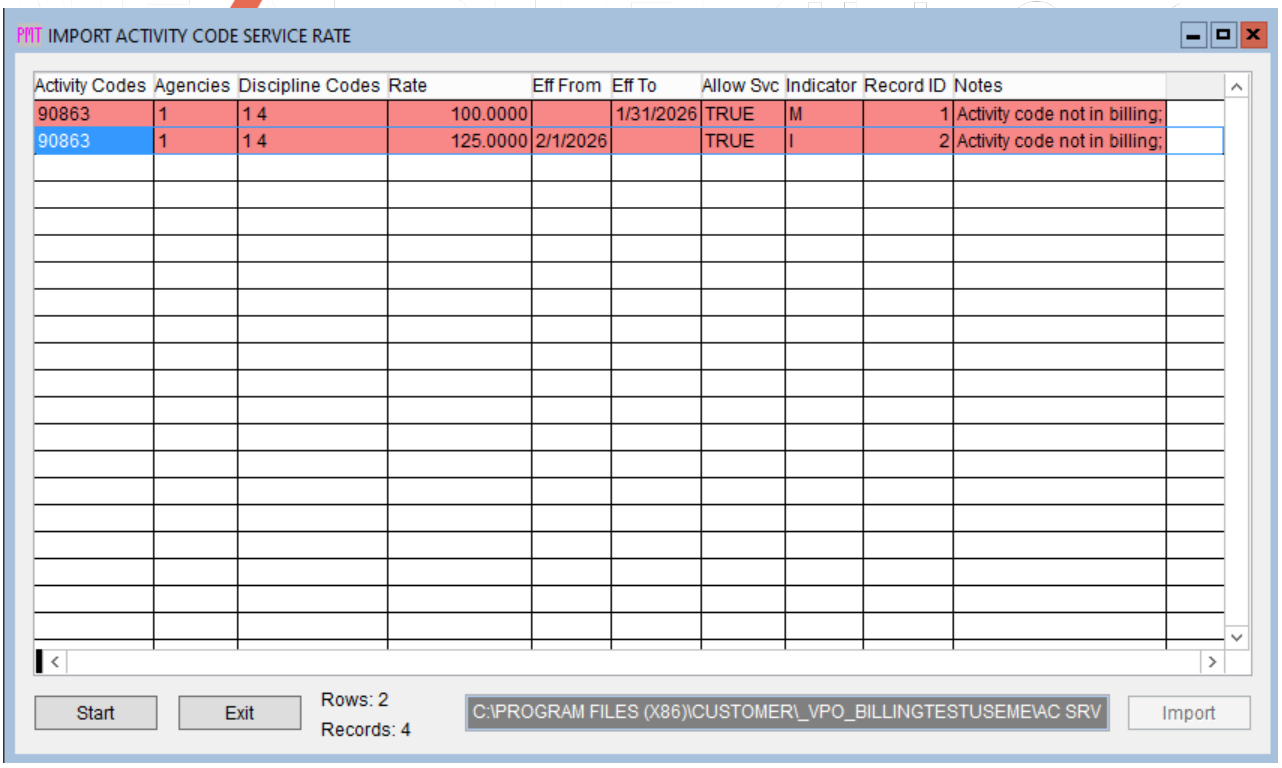
Step 4: Upload your CSV File into Parallels/NextStep Billing

- 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 aboutUploading Using Parallels

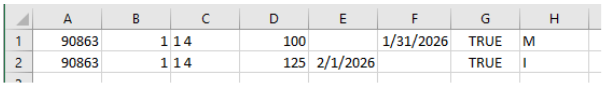
Step 5: Import your records

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

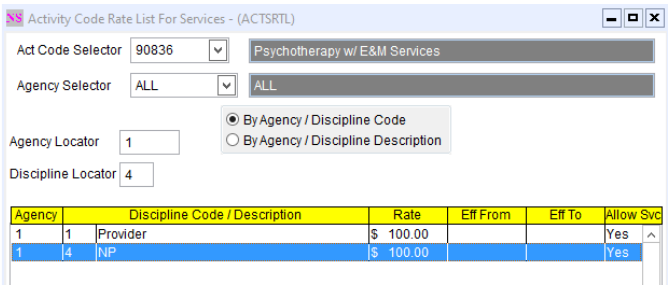
- Click Start and open the uploaded file
- After opening the file, you will see accepted lines in white, warning lines in yellow, or unaccepted lines in red. If there are no red lines, click Import
  - After importing, there will be a pop-up letting you know "Process complete! X keys imported."
  - You 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.



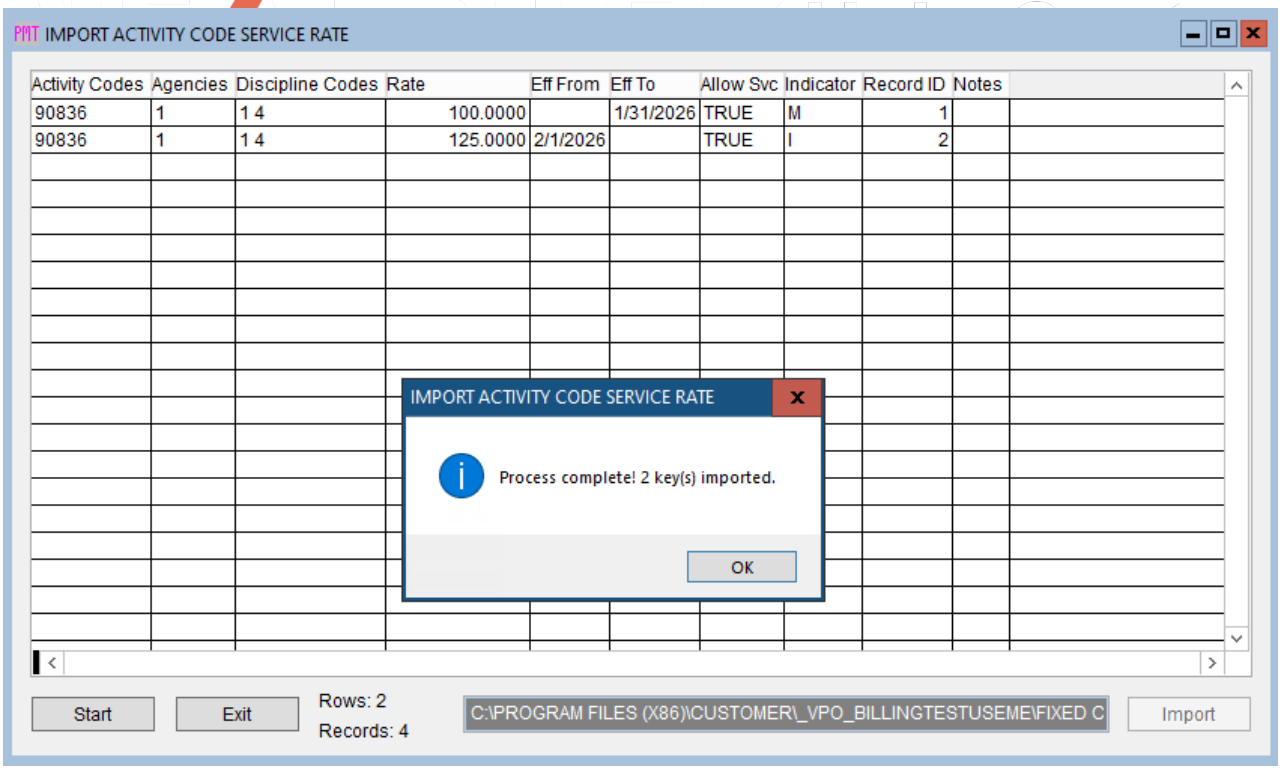
In the example above, the Activity Code was mistyped as "90863" instead of "90836"; therefore, the system does not recognize the Activity Code.



	A	B	C	D	E	F	G	H
1	90863	1	1 4	100		1/31/2026	TRUE	M
2	90863	1	1 4	125	2/1/2026		TRUE	I



I fixed the Activity Code in the Excel CSV file and saved it. Then, I reuploaded the file to ParallelsThe file was without error, so I could click Import and receive the confirmation pop-up.



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

