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## Set Up Billable Staff

When new staff joins your team, it is necessary to set them as a billable staff member within the Billing Engine if they are rendering billable services within your Agency. The staff member profile you have created for the user in NSS will create an Employee and Staff entry within the Billing Engine. However, you must complete the following 3 steps to make them a recognized billable staff member in the Billing Engine:

### Step 1: Employee Contractor Form Setup

1. Navigate to the Employee/Contractor List: **Maintenance and Setup > Employees > Employee/Contractor > Employee/Contractor**.
2. Select the staff member you want to make billable, and click the **OK** button.  
**Note:** The list defaults to sort by Staff #, but you can change the radio button to sort by Last Name. Use the Locator box to type in the Staff # or Last name, depending on search criteria.
3. Click the **Edit** button.
4. On Page 1, enter the NPI into the **NPI No.** field.
5. In the **837 Code Qualifier** field, type **XX**. This field indicates there is an NPI # to go on claims.
6. Click the **Save** button, and proceed to the next step, Staff Form Setup.

### Step 2: Staff Form Setup

1. Navigate to the Staff List: **Maintenance and Setup > Employees > Staff > Staff**.
2. Select the same staff member, and click the **OK** button. The Staff Form is displayed.
3. Click the **Edit** button and complete the following fields:
  - **Discipline Code:** Select from the drop-down menu.
  - **License Type:** Select from the drop-down menu.
  - *(Optional)* **Taxonomy Code:** Click into the text field and type in a provider taxonomy code.

- (Optional) **Supervisor ID:** Depending on your Agency's setup, this may or may not be required if the billable staff member is billed under a Supervising clinician. Select from the drop-down menu.  
**Note:** Typical workflow to capture this information is through NSS Clinical via Form routing.
- (Optional) **Department ID:** Select from the drop-down menu. This field is informational and is used on the Transactions Report.

4. Click the **Save** button, and proceed to the next step, Staff Enrollment Setup.

### Step 3: Staff Enrollment Setup

Staff enrollments need to be set up for each of the Party Types.

1. While still in the Staff Form, click the **Staff List** button to return to the Staff List. If you left the window, navigate back to the Staff List: **Maintenance and Setup > Employees > Staff > Staff**.
2. Select the same staff name, if not already selected, and click the **Auto Enroll** button. This functionality enrolls the staff member in all Party Types.
3. A window is displayed, Process Complete! Click the **OK** button.
4. To review or edit any of the information for each Party Type, click the **Enrollment List button > Select Party Type > Ok button > Edit button**.

**Note:** You can add a Modifier within the Staff Enrollment Form if this particular staff member has a modifier associated with them.

5. Click the **Save** button.

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## Set Up Activity Codes

An Activity Code is a unique way to represent activity or activities performed during a client visit. Activity Codes are linked to Procedure Codes so that once Services become Line Items, the Procedure Codes will be attached to claims. Activity Codes need to have Service Rates entered for the different Disciplines in your Agency, Insurance Coverage must be associated with each Party Type, and Places of Services considered billable for the code must be set in order to bill without a Bill Status error.

### Step 1: Add a New Activity Code

1. Navigate to the Master Activity Code List: **Maintenance and Setup > Activity Codes > Activity Codes**.
2. Click the **OK** button and then the **Add** button.

**Note:** If you try to add an Activity Code that already exists, a Duplicate Record prompt is displayed.

3. Complete the following:

- **Activity Code:** Unique code set by your Agency for a specific Service.

- **Description:** Description of the Activity Code/what it represents.
- **Revenue Code:** Add for Institutional/UBs claims.
- **Type (Direct/Indirect):** D (Direct) is set as default.
- **Billable Activity:** Select the checkbox to make this Activity Code billable.
- **Minimum/Maximum Times To Bill:** This sets the time boundaries for what is considered billable. If the documented time is outside of these limits, an error is presented. For example, if there is a Minimum Time to Bill setting of 8 minutes, anything under 8 minutes would not be billable.
- **NDC Code:** National Drug Code, numeric identifier for a medication. Add if applicable.
- **Units/Units of Measure:** Add the units/units of measure for a medication, if applicable.
- *(Optional)* **Modifier:** Select from the drop-down menu. This is strictly used for modifiers that will always show up with this Activity Code. Activity Codes can be added at a more granular level per Party Type. See **Add Activity Code Insurance Coverage** below.

**Note:** While there are several items that define an Activity Code, the Code, Description, and Billable Activity are the fields most commonly entered.

3. Click the **Save** button.

## Step 2: Add Activity Code Service Rates

For each Discipline in your Agency, you will want to set the Service Rate (cost per unit) for the Activity Code.

1. While still in the Master Activity Code Form, click the **Act Code List** button to return to the Master Activity Code List. If you left the window, navigate back to the Master Activity Code List: **Maintenance and Setup > Activity Codes > Activity Codes**.
2. With the Activity Code selected, click the **Srv Rates** button. The Activity Code Rate List for Services window is displayed.
3. Click the **OK** button and then the **Add** button.
4. Complete the following fields:
  - **Activity Code:** The Activity Code you selected in step 2, is displayed here.
  - **Agency ID:** If this is associated with a particular Agency, select from the drop-down menu.
  - **Discipline:** Select the Discipline you want to set the Service Rate for.
  - **Rate:** Enter the rate for this specific Discipline for the Activity Code.
  - **Effective From** and **Effective To:** Add effective dates, if applicable.
  - **Allow Service For This Discipline:** Select the checkbox to allow Service for this Discipline. If left unchecked, you will get a Bill Status error.
5. Click the **Save** button.

6. (Optional) Within the Activity Code Rate Form For Services, if you need to set a different Activity Code Service Rate for a particular Insurance, Place of Contact, or Procedure Code, select one of the Override buttons.
- **Override By Proc Code:** Set an override for a specific procedure code.
  - **Override By PI Of Contact:** Set an override for a specific place of contact.
  - **Override By Ins:** Set an override for a specific insurance.
- Note:** These buttons can also be found directly on the Activity Code Rate List for Services.

### Step 3: Add Activity Code Insurance Coverage

If an Activity Code is billable for a particular Party Type, there needs to be an entry in the Activity Code Insurance List.

1. While still in the Activity Code Form for Services, click the **Exit (Esc)** button to return to the Master Activity Code List. If you left the window, navigate back to the Master Activity Code List: **Maintenance and Setup > Activity Codes > Activity Codes**.
2. With the Activity Code selected, click the **Ins Coverage** button. The Activity Code Insurance List is displayed.
3. Click the **OK** button and then the **Add** button.
4. Complete the following fields:
  - **Activity Code:** The Activity Code you selected in step 2, is displayed here.
  - **Party Type:** Select the Party Type you want to make the Activity Code billable for.
  - **Billing Rate Code:** This is a hardcoded list of calculation rules for the number of units. Select from the drop-down menu.
  - **Procedure Code ID:** To link a specific Procedure Code to the Activity Code, select from the drop-down menu.  
**Note:** This is what goes on the Line Item.
  - **Modifier:** To add a Modifier at the Party Type level, select from the drop-down menu.
  - **Screen:** Enter the Fee Schedule. This will show on Line Items and reports.
  - **Skip If Primary:** Select the checkbox so that the system skips primary payer and moves to next payer in list for this code.
  - **Stop If Primary:** Select the checkbox to apply a Bill Status (Do Not Bill) for primary insurance for this code.
5. Click the **Save** button.

**Note:** If you want to add a Modifier or override information at an insurance payer level, within the Activity Code Insurance Form click the **Override by Insurance** button or from the Activity Code Insurance List, click the **Override by Insurance** button. Complete the information as necessary for a specific insurance payer. It is important to note that Modifiers are additive. Any Modifier added in the Override form will be in addition to any Modifier set at the Party Type level.

## Step 4: Add Activity Code Billable Place of Service

1. While still in the Activity Code Insurance Form, click the **Contacts Billable** button. The Contacts Billable List is displayed. If you left the window, navigate back to the Activity Code Insurance List: **Maintenance and Setup > Activity Codes > Activity Codes > Select Activity Code > Insurance Coverage > Select Party Type > Contacts Billable** button.
2. Click the **OK** button and then click the **Add** button.
3. Complete the following fields:
  - **Activity Code:** Select from the drop-down menu.
  - **Party Type:** Select from the drop-down menu.
  - **Contact Type:** Select the Place of Service from the drop-down menu.
  - **Billable As CSW/CP?** Always select this checkbox.  
**Note:** If the staff member has a Provider Type of CSW or CP and this box is not selected for the Activity Code, you will get a Bill Status error.
  - **Primary Billed Insurance Procedure Code Override:** Select from the drop-down menu, if applicable.
  - **Non Primary Billed Insurance Procedure Code Override:** Select from the drop-down menu, if applicable.
  - **Non Primary Insurance Billed as Primary Procedure Code Override:** Select from the drop-down menu, if applicable.
4. Click the **Save** button.
5. Click the **Exit (Esc)** button or **X** to close all windows.

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## Add a New Insurance Payer

When your Agency goes live with NSS, there is a set of payers already imported into the software. However, if your Agency starts accepting new insurance, you may need to add an insurance payer record into the Billing Engine.

### Add a New Insurance Payer

1. Navigate to the Master Insurance List: **Maintenance and Setup > Insurance > Insurance**.  
**Note:** Open two instances of the Master Insurance List to allow for copying information from an existing Payer.
2. Click the **OK** button and then the **Add** button.  
**Note:** If you opened a second instance of the Master Insurance List to copy from, select a plan similar to the insurance you're adding in the other instance (e.g. same Party Type/Format Type) and click the **OK** button.
3. In the Master Insurance Form, complete the fields on Page 1:
  - **Insurance ID:** Type into the field.

- **Party Type:** Select from the drop-down menu.
- **Format Type/Format Type 2:** Select from the drop-down menus. The most commonly used Format Types are listed below:

Party Type	Paper Claim Format	Electronic Claim Format
Other Insurance	8: HCFA 1500 - OTHER	21: HIPAA 837 Other Insurance
BCBS	2: HCFA 1500 - BCBS	19: HIPAA 837 BCBS
Medicaid	7: HCFA 1500 - Medicaid CW	16: HIPAA 837 Medicaid Children's Waiver
Medicare	9: HCFA 1500- MC B Form	20: HIPAA 837 Medicare B

**Note:** If you need to print institutional claims, the paper claim Format Types are: 40- UB04 Medicaid, 41- UB04 BCBS, 42- UB04 Other, and 43- UB04 Medicare.

- **Insurance Name and Address:** Type into the fields.
- Complete the rest of the fields in this window as necessary for this insurance payer.
 

**Note:** To set that Prior Authorization is required at the insurance level, select the **Prior Authorization Required** checkbox. This will auto-check the Prior Authorization Required? checkbox in Client Insurance Form.
  - Click the **Page 2** tab. Copy information and settings from the existing Payer window. **Do not** copy Payer ID and Payer Name fields, as these should be different.
 

**Note:** You can check the settings in this window against your Clearinghouse's Companion Guide.
  - (Optional)* Click on **Page 3**. Add override information if insurance always needs to render under a specific provider.
  - (Optional)* Click the **Display Provider Info in 837 2300 NTE** checkbox to add the Provider and Provider NPI from the Staff ID field to the 2300 loop NTE and Line Item 19.
  - (Optional)* Click the **Include 837 CN1 Segment** checkbox to add the Contract Number from the Program associated with the service into the CN1 segment.
  - Click the **Save** button.

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## Add a New Modifier

Just like with Payers, there is an existing set of Modifiers available in the Billing Engine when your Agency goes live. However, there may be times when it is necessary to add a new Modifier.

### Add a New Master Activity Code Modifier

1. Navigate to the System Codes List: **Maintenance and Setup > System Codes**.
2. Type **ACMOD** into the **Code Type Locator** field. The first ACMOD entry will be highlighted. Review all entries for ACMOD to make sure you are not adding a duplicate.  
**Note:** In this example, we are adding a Master Activity Code Modifier to the system so that it will show as an option in the drop-down menu in the Master Activity Code Form. If you need to add Modifier options in other forms, click the Edit button within the form and select the Modifier drop-down. In the lower left-hand corner of the Billing Engine you will see **Code Type = “ ”**. This is the Code Type associated with the drop-down (e.g. Activity Code Insurance Form Modifier drop-down menu is associated with the code type PCMOD.) You can also see the different Code Types by navigating to **Maintenance and Support > Code Types**.
3. Click the **OK** button and then click the **Add** button.
4. Complete the following fields:
  - **Code Type:** Type **ACMOD** into the field.  
**Note:** To add a different Modifier than the one on the Master Activity Code Form, remember to use the specific Code Type in this step.
  - **Code Value:** Type one or more Modifiers into the field.  
**Note:** Multiple Code Values must be separated by a colon.
  - **Code Xref:** May be left blank.
  - **Short Description:** May be left blank.
  - **Long Description:** Type in description of Modifier. This is displayed in the Code Description column in the System Codes List.
5. Click the **Save** button.

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