

Service Codes - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create, view, edit, or deactivate service codes.

*Please note: Cost Center and Funding Source must be created prior to the Service Code. Service Codes added cannot be deleted, but the status may be changed to inactive when making edits in the form wizard.

Role Required: Super User

Permission Required: Funding Source Admin

Create Service Code

1. Log in to DCI
2. Select **Settings** on the main menu
3. Select **Funding Sources** on the submenu
4. Use filters to search for funding source and click **Search**
5. Click anywhere in the funding source row to open
6. Click **Actions**
7. Select **New Service Code** and complete the form wizard

- a. Funding Source: **Auto-populates** from the funding source used to create the service code. The field is locked.
 - i. If a service code is added directly from the funding source tab without first opening a funding source, the field is unlocked, and a funding source can be selected from the drop-down.
- b. Account Type (**required**): The type of program or service correlated with this service code.
 - i. Hourly – **One to one** service
 - ii. Residential Program – Client lives at the program
 - iii. Day Program – Client travels to the program
 - iv. Group Service – **Two** or more clients
 - v. Parenting Program - Client lives at the program
 - vi. Transportation – **Transportation** to and from the day program
 - vii. Client Transportation – Used in conjunction with an hourly service
 - viii. Vendor (FI only) – Vendor payments
- c. Service Code Name (**required**): User-friendly name. Employees will select when adding a punch.
- d. Funding Type: Select whether the authorization is for units or dollars
- e. Billing Details: Click the blue **plus sign (+)** icon to expand the billing options
 - i. Bill Code (**required**): Unique identifier provided by the funding source
 - ii. Bill Code Modifiers: Optional field allowing up to four bill code modifiers
 - iii. Billable: Defaults to yes. Select no if this is a non-billable service.
 - iv. Billing Unit (**required**): The increment in which the funding source requires the service to be billed
 - v. Billing Multiplier (**required for hourly**): Use to define hourly units for billing. Options are:
 1. Hourly – 60 minutes
 2. Half Hourly – 30 minutes
 3. Quarter Hourly – 15 minutes
 - vi. Default Billing Modifier (optional): Optional modifier which appears on the billing file
 - vii. Rounding Increment (**required**): Select by minutes
 1. None – No rounding
 2. 15 – Round by 15 minutes
 3. 30 - Round by 30 minutes
 4. 60 - Round by 60 minutes
 - viii. Rounding Type (**required if the rounding increment is 15, 30, 60**) – Select how to round
 1. Round – To the nearest
 2. Truncate – Round down
 3. Increment – Round up
 - ix. Billing Rollup Type (**required**): Entries will be reported by billing rollup ID by the client
 1. None – Each entry has a unique billing rollup id
 2. Daily – Entries with the same date and client have the same billing rollup id
 3. Weekly - Entries in the same week and for the same client have the same billing rollup id
 4. Monthly - Entries in the same month and for the same client have the same billing rollup id
- f. Payroll Details: Click the blue **plus sign (+)** icon to expand the payroll options
 - i. Payable: If yes, all employee time entries associated with this service code will appear on the payroll file. If no, the employee will not be paid for time clocked against this service.
 - ii. Overtime Exempt: If yes, employee time entries associated with this service code will not count towards the accumulation of 40 hours to calculate overtime.
 - iii. Payback/Rebill (only for dollars-based): If Yes, overtime automatically reallocates to the correct date of service in the pay period.
 - iv. Default Pay Rate (optional): Entering a pay rate here will autofill the pay rate in all service accounts created with this service code.
 1. Default Pay Rate can be edited on the Service Account

- v. Has Max Pay Rate (optional): Defaults to no. If yes, this service code will have a max pay rate for any employee providing the service. This includes overtime.
 - vi. Max Pay Rate (optional): If **Has Max Pay Rate** is yes, this field unlocks and becomes required.
 - g. Show Remaining Balance: Defaults to no. If yes, when an employee creates a punch, the remaining authorization balance displays in units or dollars in the web portal, and displays total available time in the mobile app.
 - a. Please note: For dollars-based service codes, the remaining balances are **estimates** as they can be impacted by several factors such as overtime, changes in employee pay rates, or having multiple employees with different pay rates working for the same client.
 - h. Remaining Balance Details: Click the blue **plus sign (+)** to expand the section
 - i. Show Monthly Balance: If yes, the remaining monthly balance displays as time when employees create a punch in the mobile app.
 - ii. Show Weekly Balance: If yes, the remaining weekly balance displays as time when employees create a punch in the mobile app.
 - iii. Show Daily Balance: If yes, the remaining daily balance displays as time when employees create a punch in the mobile app.
 - i. Allow Diagnosis Code: Defaults to yes. If no, this field will not appear when an employee adds an entry for this service code.
 - j. Allow Accrued Time Entries: If yes, accrued time entries are permitted.
 - k. Require EVV Location: Defaults to no. If yes, all entries will require an EVV location.
 - i. When the setting is enabled, employees will be required to select an EVV location at clock in and clock out for punch entries.
 - ii. If an EVV location is not selected, the user will receive an alert and the clock in or clock out cannot occur until the location is selected.
 - l. EVV Required: If yes, EVV will be required on all punches associated with this service code. EVV must be enabled to activate Phone EVV and/or FOB functionality.
 - m. Enable Geofencing: If yes, this service can only be provided within an established radius from approved locations.
 - i. If the punch fails geofencing, it is flagged for review, not rejected.
 - n. Require Care Notes: Only for Hourly account type when the Care Management module is enabled, and the task is required. If yes is selected, employees cannot clock out in the mobile app without publishing care notes.
 - o. Has Daily Rate: Defaults to yes, meaning the funding source will switch to a daily rate for this service after a specified number of hours is reached in a day. Click the blue **plus sign (+)** icon to expand the **daily rate** options.
 - i. Daily Max (**required**): The maximum number of hours this service can be provided in a day before switching to the daily rate.
 - ii. Daily Bill Rate: Bill rate when converted to a daily rate
 - iii. Daily Bill Code: Bill code when converted to daily rate
 - iv. Include Daily Pay Hours in OT Calculations: When converted to the daily rate, selecting yes means hours are included in overtime calculations.
 - p. Default Auth Specs (optional): If this service code has a standard billing rate, daily max, weekly max, and/or monthly max, mark yes and complete the fields that are made visible. All new authorizations under this service code will auto-populate these figures.
 - q. Reference Fields (optional): Data entered in fields Service Code Reference 1, 2, and 3 Data is defined by the user and appear on the billing file.
 - r. GL Code (optional): Field for integration with GL system
 - s. Description (optional): Additional information as needed
 - t. Status: Defaults to active. Select inactive when no longer a valid service code.
 - u. Canned Statements (optional): Click the blue **plus sign (+)** icon to add canned statements (acknowledgments) that the employee can select at clock out.
 - v. Default CPT Code and Default HCPCS Code (optional): The default code for this service. Only one or the other may be entered.
 - i. CPT and HCPCS codes appear on client funding accounts and may be edited.
 - w. Certification Template (optional): Select if there are a set of certification requirements specific to this service code. **Part of the Training Module.**
 - x. EVV Aggregation Required (account type only - hourly, client transportation, group service) Yes or no options, defaults to no. If yes, punches for this service code will be aggregated to the funding source.
 - y. Is Travel Time (account type only - hourly): Yes or no options, defaults to no.
 - z. Display Monthly Budget Link (instance level setting): Monthly budget report will be linked to the authorizations of individuals receiving this service and available for viewing on employer and case worker profiles
8. Select **Save** to continue and **Yes** to confirm

View, Edit, or Deactivate Service Code

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use filters to search for funding source and click **Search**
5. **Click anywhere in the funding source row** to open
6. Scroll down the page and select the **Service Codes** tab
7. **Click anywhere in the row of the service code** to be viewed, edited, or deactivated.
8. Click **Actions**
9. Select **Edit Service Code** from the drop-down menu
10. View or make edits in the Service Code form wizard
 - a. To deactivate, change the status to **Inactive**.
11. Click **Save** and **Yes** to confirm

Related articles

- [Business Rule List](#)
- [Business Rules](#)
- [Service Codes - Create, View, Edit, or Deactivate](#)

- [Authorization Remaining Balances as Time in the Mobile App](#)
- [System Set-Up - Admin Guide](#)