



# **Service Code Revamp User Guide**

**November 2021**



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## Background & Purpose

**Service codes** are required for billable and payable items tied to **services**, such as **visits**. The **bill code** and **pay code** configurations on the service code will determine how the item is paid or billed.

The service codes list in **Accounting > Accounting Settings > Service Codes** has been redesigned so that you will be able to attach a bill code at the same time that you are creating a new service code. You will no longer have to save the new service code and then go back and add any bill codes that should be attached to it.

The new service codes page also introduces the concept of **rating methodologies**. A rating methodology refers to the type of rules that are used to generate billable items based on one or more bill codes linked to a service.

The only rating methodology currently available is **funder driven**, which represents the current setting requirements in AlayaCare in which bill codes must be linked to a funder, and only one bill code per funder can be linked to a service code. As a result, a single billable item is generated on an invoice/claim per visit for that funder. More rating methodologies will become available later to allow greater flexibility with regards to how billable items are generated based on the bill code configuration linked to a service.



## Permissions

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The following ACLs must be enabled for an employee's role in order to view, add, and edit service codes:

- **Accounting>Accounting General:** this permission is required to view service codes under accounting settings.
- **Accounting>Edit Service Code:** this permission is required to add and edit service codes.



## Adding a New Service Code

Creating a new service code

To create a new service code, go to **Accounting>Accounting Settings>Service Codes**.

| Name                                 | Description | Department     | Rating methodology | Regular pay code          | Status  | Branch     |      |
|--------------------------------------|-------------|----------------|--------------------|---------------------------|---------|------------|------|
| service code                         | --          | --             | Funder driven      | --                        | Enabled | AlayaCare  | Edit |
| Krabby Patties                       | --          | --             | Funder driven      | --                        | Enabled | Branch 2.1 | Edit |
| Assistance With Self-Care Activities | --          | PSW Department | Funder driven      | Regular Pay - \$10.00     | Enabled | AlayaCare  | Edit |
| Krabby Patty                         | --          | --             | Funder driven      | Krabby Employee - \$35.00 | Enabled | Branch 2.1 | Edit |
| Nursing Care                         | --          | Branch 2       | Funder driven      | Holiday LK - \$30.00      | Enabled | Branch 2.1 | Edit |
| Skilled Nursing (100)                | --          | --             | Funder driven      | --                        | Enabled | AlayaCare  | Edit |
| Health Checkup (25)                  | --          | --             | Funder driven      | --                        | Enabled | Branch 1   | Edit |
| Routine blood test (150)             | --          | --             | Funder driven      | --                        | Enabled | Branch 2   | Edit |
| BP test (25)                         | --          | --             | Funder driven      | --                        | Enabled | Branch 2   | Edit |
| Blood Test (30)                      | --          | --             | Funder driven      | --                        | Enabled | AlayaCare  | Edit |

You will be able to see the **Name, Description, Department, Rating methodology, Regular pay code, Status (Enabled or Disabled)**, and **Branch** (if your organization has a multi-office setup),.

If an overtime pay code or holiday pay code has been set up for the service code, these codes and rates will be displayed in the **Regular pay code** column as a tooltip.





You can filter on the list of configured service codes by **Department**, **Rating methodology**, or **Status**. You can also search for service codes by their **Name & description**.

Header of the service code list showing filter options: Name & description, Department, Rating methodology (All), Status (Enabled), and Branch. A '+ Add service code' button is visible in the top right corner.

To add a new service code, click **+Add service code**.

Table showing a list of service codes. A red arrow points to the '+ Add service code' button in the top right corner of the table area.

| Name   | Description  | Department     | Rating methodology | Regular pay code      | Status  | Branch |
|--|--|----------------|--------------------|-----------------------|---------|--------|
| 3.1 - Negative   | -  | PSW Department | Funder driven      | --                    | Enabled | Bra    |
| 3.1 - Par visit/rate/hours (disable billing)                             | -  | -              | Funder driven      | --                    | Enabled | Bra    |
| 3.1 - Zero Rate  | Zero | -              | Funder driven      | --                    | Enabled | Bra    |
| Access Community, Social And Rec Activities - Standard - Weekday Daytime | -  | -              | Funder driven      | --                    | Enabled | Bra    |
| Assistance With Self-Care Activities - Standard - Weekday Daytime        | -  | -              | Funder driven      | --                    | Enabled | Bra    |
| Bathing Service  | -  | -              | Funder driven      | Regular Pay - \$10.00 | Enabled | Bra    |
| BC1 PER RATE (50)  | Abricot  | -              | Funder driven      | --                    | Enabled | Bra    |

You should now see the below. Here you can enter information to determine how visits for this service should be scheduled, approved, billed, and paid.

Form titled 'Add service code' with three main sections: Service code details, Scheduling details, and Payroll details.

**Service code details:**

- Name\* (text input)
- Description (text input)
- Department (dropdown menu, currently 'Not set')

**Scheduling details:**

- Duration (input with 'Min' label)
- Visits can overlap
- Disregard in employee capacity
- Allow virtual care

**Payroll details:**

- Regular pay code (input with search icon) and Rate (dropdown, currently '--')
- Overtime pay code (input with search icon) and Rate (dropdown, currently '--')
- Holiday pay code (input with search icon) and Rate (dropdown, currently '--')
- Expense code (input with search icon) and Rate (dropdown, currently '--')
- Overtime exempt

Buttons: Cancel, Next



First, enter a **Name** for the service code. The service code name will be used throughout the application.

You also have the option to enter a **Description** for the service code and select an employee **Department** (for example, Nursing, Therapy, Personal Support, etc.). Setting a department on the service code is optional, but if you set it, you will only be able to assign employees that belong to that department to visits for that service, unless you use the employee finder to remove the department filter.

In the **Scheduling details** section, enter the default visit **Duration** you wish to set for this service code. Note that this default duration can be changed at the time of scheduling a visit.

Check the box next to **Visits can overlap** if you wish to allow visits with this service code to overlap for the same employee. If the service code of the visit you are scheduling does not have this box checked, you will receive a warning when trying to schedule overlapping visits.

Check the box next to **Disregard in employee capacity** if visits of this service code should not count toward an employee's total hours and therefore will not impact their daily or weekly capacity.

If you are using AlayaCare's **virtual care** module, check the box next to **Allow virtual care** to allow visits with this service code to be conducted virtually. Note that you will only see this option if the virtual care feature is enabled in your environment.



In the **Payroll details** section, you can select the pay codes and expense code you wish to use for this service. The following pay code types are available to configure for a service code:

| Payroll details                              |      |
|--|------|
| Regular pay code                             | Rate |
| <input type="text" value="Start typing..."/> | -    |
| Overtime pay code                            | Rate |
| <input type="text" value="Start typing..."/> | -    |
| Holiday pay code                             | Rate |
| <input type="text" value="Start typing..."/> | -    |
| Expense code                                 | Rate |
| <input type="text" value="Start typing..."/> | -    |
| <input type="checkbox"/> Overtime exempt     |      |

### Pay code types

**Regular pay code:** the pay code assigned to payable items with this service code that are not eligible for overtime or holiday pay when payroll is run.

**Overtime pay code:** the pay code that will be used when payroll is run if a visit with this service code goes into overtime.

**Holiday pay code:** if a visit with this service code occurs on a holiday and the employee is eligible for holiday pay, this pay code will be used when payroll is run. Note that if a visit qualifies for both overtime and holiday pay, only the holiday pay code will be used.

**Expense pay code:** when this service code is used for a service provided by a supplier, the expense code will be used for expense accrual and reconciliation.

To select a configured pay code/expense code for each field, simply start typing. After selecting a code, the associated **Rate** will be displayed.



Check the box next to **Overtime exempt** if a visit with this service code should not count toward the assigned employee's total hours and therefore should not impact their eligibility to be paid overtime. For example, an ON-CALL service code could be created with this option checked to ensure that the employee is paid for on-call hours but set with this option checked so that the hours do not count as overtime.

Once you have completed the necessary fields on this screen, click **Next** to enter the billing details for the service code.

| Regular pay code        | Rate                 |
|-------------------------|----------------------|
| Regular Pay             | \$10.00 per amount   |
| Overtime pay code       | Rate                 |
| Overtime Pay            | \$12.00 per amount   |
| Holiday pay code        | Rate                 |
| Holi-101 - Holiday Pay  | \$60.00 per visit    |
| Expense code            | Rate                 |
| HQE - HQ Branch Expense | \$2,332.00 per visit |

Overtime exempt

Cancel **Next**

In the next screen, select a **Rating methodology**.

Currently, the only option available to select will be **funder driven**, meaning that the rates applied to billable items linked to this service code will be determined by the funder-bill code combination.

Rating methodology\*

Not set

Cancel Previous Save



After selecting **funder driven**, you will be able to add bill codes to the service code by selecting **+Add bill code**.

**Add service code** ✕

Rating methodology\*  
Funder driven

Bill code details

⚠ Service code configured with the funder driven rating methodology must be configured with at least 1 bill code.

+ Add bill code

| Funder        | Bill code | Effective rate |
|---------------|-----------|----------------|
| No data found |           |                |

Cancel Previous Save

Start typing to select the **Funder** you wish to use for this service code. The funder you select will determine which Bill codes will be available to select in the next field.

**Add service code** ✕

Rating methodology\*  
Funder driven

Bill code details

+ Add bill code

| Funder            | Bill code | Effective rate |
|-------------------|-----------|----------------|
| Start typing... 🔍 | Not set   | -              |

Confirm

Cancel Previous Save

After adding a funder and selecting a bill code, the **Effective rate** will be displayed in the third column. Click **Confirm** to add the bill code to service code.

**Add service code** ✕

Rating methodology\*  
Funder driven

Bill code details

+ Add bill code

| Funder            | Bill code | Effective rate   |
|-------------------|-----------|------------------|
| Blue Cross - CI 🔍 | CI-Rate   | \$10.00 per rate |

Confirm

Cancel Previous Save



Select **+Add bill code** again to add more bill codes to the service code.

**Add service code** ✕

Rating methodology\*  
Funder driven

**Bill code details**

| Funder          | Bill code | Effective rate   |      |
|-----------------|-----------|------------------|------|
| Blue Cross - CI | CI-Rate   | \$10.00 per rate | Edit |

**+ Add bill code**

Cancel Previous Save

If you wish to make changes to a bill code, select the **Edit** button, or select the downward arrow next to **Edit** and select **Delete** to remove the bill code from the service code.

**Add service code** ✕

Rating methodology\*  
Funder driven

**Bill code details**

| Funder          | Bill code | Effective rate   |      |
|-----------------|-----------|------------------|------|
| Blue Cross - CI | zero-rate | \$12.00 per hour | Edit |

**+ Add bill code**

Delete

Cancel Previous Save

If you wish to go back and review the information you entered for the service code before saving, select **Previous**. Otherwise, click **Save** to add the new service code to the system.

**Add service code** ✕

Rating methodology\*  
Funder driven

**Bill code details**

| Funder          | Bill code | Effective rate   |      |
|-----------------|-----------|------------------|------|
| Blue Cross - CI | CI-Rate   | \$10.00 per rate | Edit |

**+ Add bill code**

Cancel Previous Save



## Editing a Service Code

To edit the **name, description, department, scheduling details, or payroll details** for a service code, select the **Edit** button.

| Department     | Rating methodology | Regular pay code      | Status  | Branch     |      |
|----------------|--------------------|-----------------------|---------|------------|------|
| PSW Department | Funder driven      | --                    | Enabled | Branch 3.1 | Edit |
| --             | Funder driven      | --                    | Enabled | Branch 3.1 | Edit |
| Zero           | Funder driven      | --                    | Enabled | Branch 3.1 | Edit |
| --             | Funder driven      | --                    | Enabled | Branch 1.1 | Edit |
| PSW Department | Funder driven      | Regular Pay - \$10.00 | Enabled | AlayaCare  | Edit |

You can then make your changes, as seen below.

**Edit service code**

**Service code details**

Name\*  
Assistance With Self-Care Activities

Description

Department  
PSW Department

**Scheduling details**

Duration  
120 Min

Visits can overlap  Disregard in employee capacity

**Payroll details**

|                   |                         |      |                      |
|-------------------|-------------------------|------|----------------------|
| Regular pay code  | - Regular Pay           | Rate | \$10.00 per amount   |
| Overtime pay code | - Overtime Pay          | Rate | \$12.00 per amount   |
| Holiday pay code  | Holi-101 - Holiday Pay  | Rate | \$60.00 per visit    |
| Expense code      | HQE - HQ Branch Expense | Rate | \$2,332.00 per visit |

Overtime exempt

Cancel Save

If you wish to make changes to the **rating methodology** or **bill codes** on the service code, click the downward arrow next to **Edit** and select **Edit billing detail**.

|               |                       |         |            |      |
|---------------|-----------------------|---------|------------|------|
| Funder driven | --                    | Enabled | Branch 1.1 | Edit |
| Funder driven | Regular Pay - \$10.00 | Enabled | AlayaCare  | Edit |
| Funder driven | --                    | Enabled | Branch 1.1 | Edit |

Dropdown menu for 'Edit' button:  
Edit billing detail  
Disable



You will be able to add and edit bill codes from the service code in the resulting dialogue. **Note that once a service code is saved, upon editing, you cannot delete a Funder as it may be in use for a visit. However, you can edit the bill code that is linked to any Funder.**

**Edit billing detail** ✕

Rating methodology\*  
Funder driven ▾

**Bill code details**

+ Add bill code

| Funder          | Bill code | Effective rate   |                                  |
|-----------------|-----------|------------------|----------------------------------|
| Blue Cross   CI | CI-Rate   | \$10.00 per rate | <span>Edit</span> <span>▾</span> |

Cancel Save



## Disabling a Service Code

---

To disable a service code, click the downward arrow next to **Edit** and select **Disable**.

|               |                       |         |            |        |
|---------------|-----------------------|---------|------------|--------|
| Funder driven | --                    | Enabled | Branch 1.1 | Edit ▼ |
| Funder driven | Regular Pay - \$10.00 | Enabled | AlayaCare  | Edit ▼ |
| Funder driven | --                    | Enabled | Branch 1.1 | Edit ▼ |

A red arrow points from the 'Regular Pay - \$10.00' cell to the 'Disable' option in the dropdown menu of the 'AlayaCare' row. The 'Disable' option is highlighted with a red box.

In the dialogue, click **Save** to confirm that you wish to proceed with disabling the service code.

### Disable service code

Are you sure you want to disable: Assistance With Self-Care Activities

Cancel Save