Service Code Revamp
User Guide

November 2021

Table of Contents:

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

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.**

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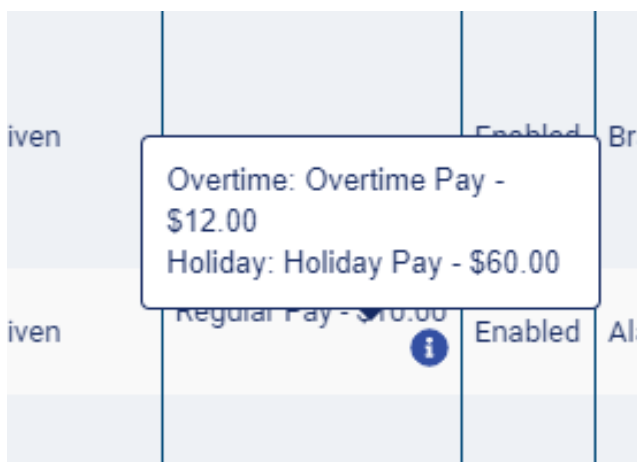
You can filter on the list of configured service codes by **Department, Rating methodology**, or **Status.** You can also search for service codes by their **Name & description**.

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

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.

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

Service code details

Name*

Description

Department
Not set

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.

Scheduling details

Duration

‐   Min

☐ Visits can overlap   ☐ Disregard in employee capacity

☐ Allow virtual care

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:

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.

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.

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

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.

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.

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

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.

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.

Editing a Service Code

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

You can then make your changes, as seen below.

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**.

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.**

Disabling a Service Code

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

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