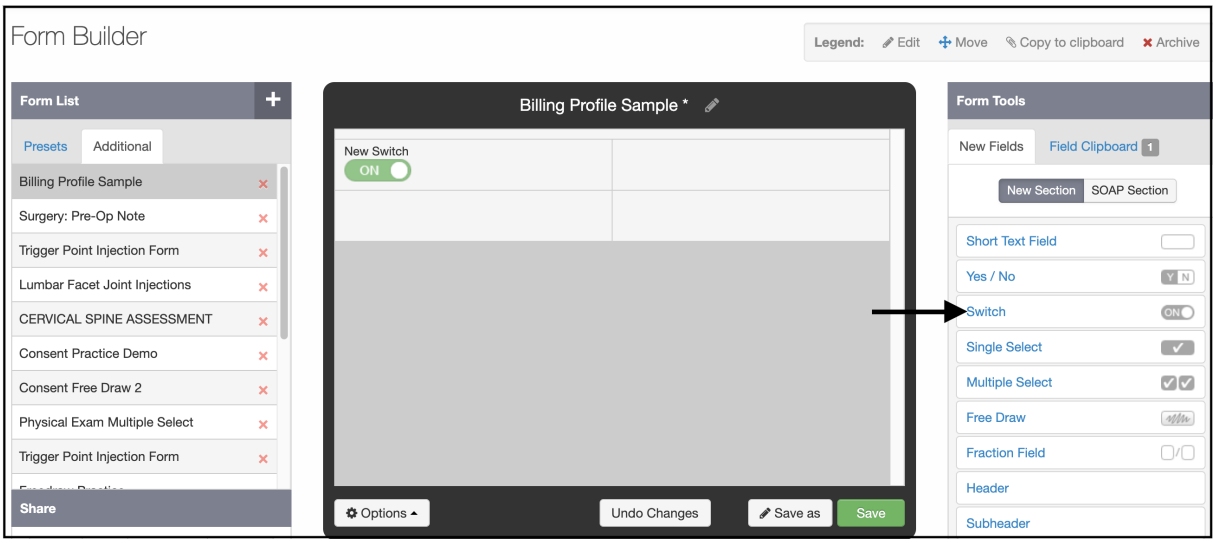
Adding Billing Profiles in the Form Builder

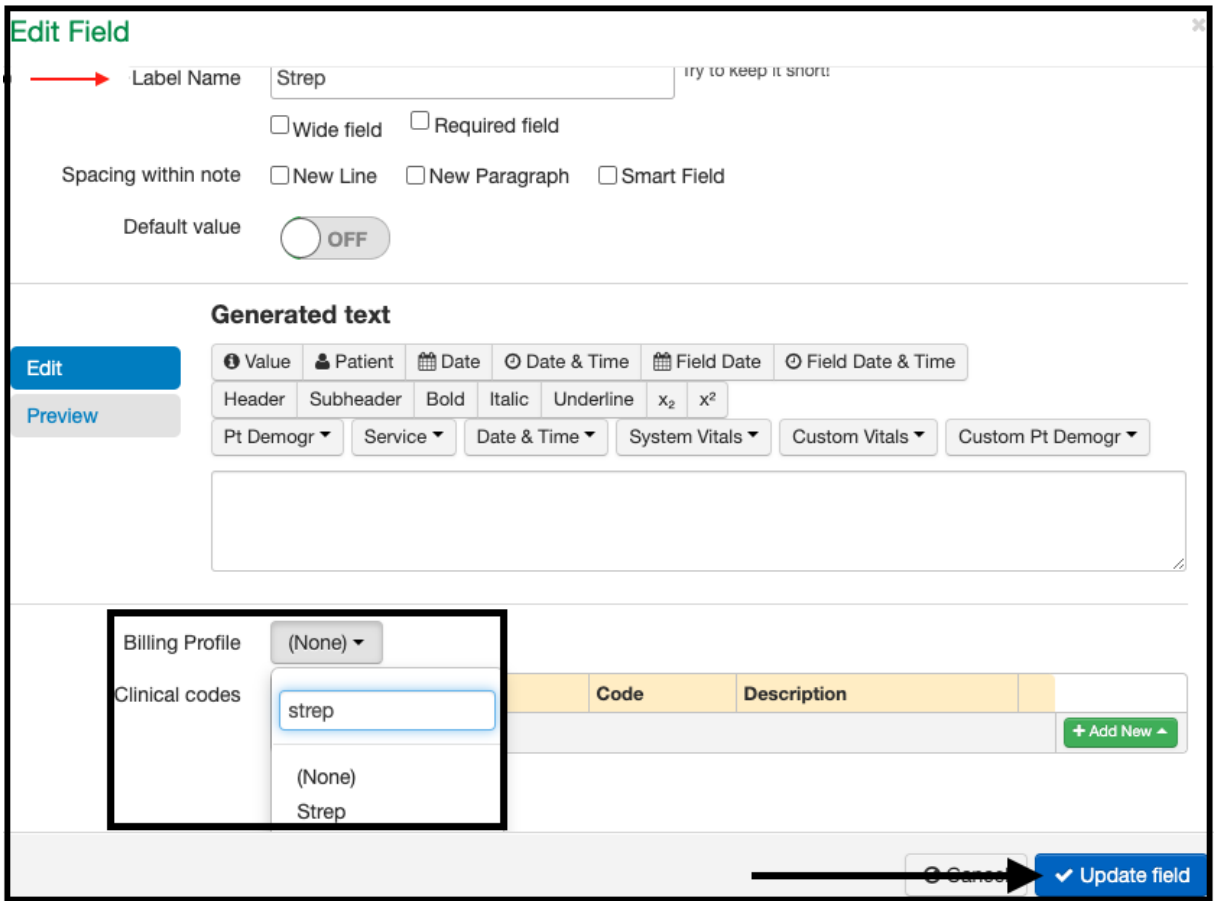
Last modified on 11/01/2024 9:45 am EDT

Utilizing billing profiles allows you to efficiently add ICD-10, CPT, HCPCS, and/or Custom codes to common visit types. Here is how you can add them from the form builder.

1. Navigate to **Clinical** > **Form Builder**.
2. Select the form you would like to add the profile to and add a **Switch**.



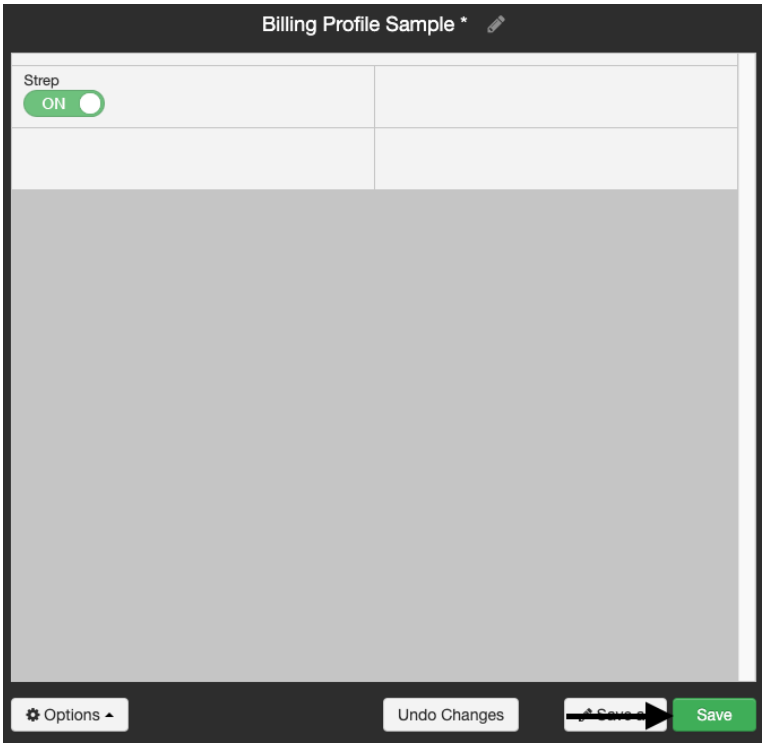
3. Enter a name for the switch in the **Label Name** field.
4. Go to the **Billing Profile** menu and select the profile.
5. Select **Update Field**.

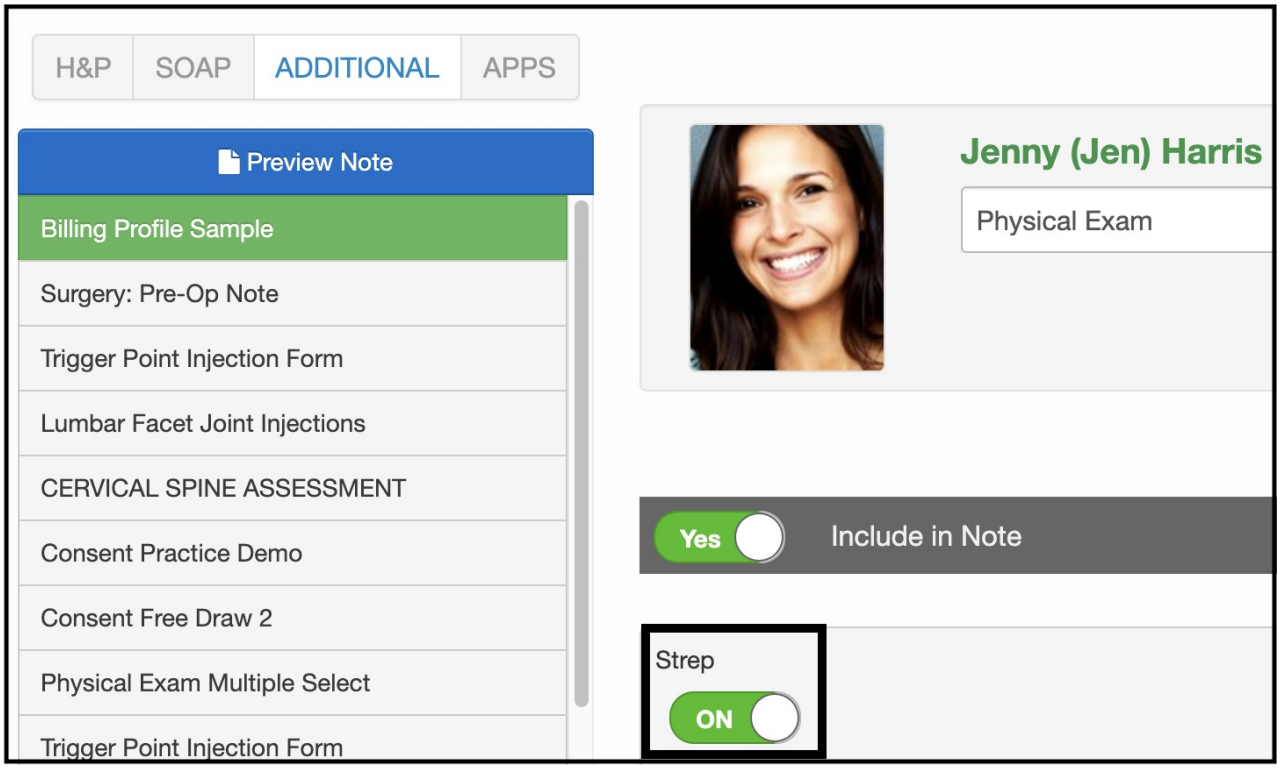


6. Click **Save** to save the changes to your form.

7. In the clinical note, activate the switch to apply the **Billing Profile.**

All patient data listed in this article is sample data. This is not a real person or real patient data.


Billing Profile Sample *
Strep
ON
Options
Undo Changes
Save


H&P
SOAP
ADDITIONAL
APPS
Preview Note
Billing Profile Sample
Surgery: Pre-Op Note
Trigger Point Injection Form
Lumbar Facet Joint Injections
CERVICAL SPINE ASSESSMENT
Consent Practice Demo
Consent Free Draw 2
Physical Exam Multiple Select
Trigger Point Injection Form
Jenny (Jen) Harris
Physical Exam
Yes
Include in Note
Strep
ON