Lock a note and automatically change the billing status

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DrChrono provides a setting that will add automation to your practice's workflow. The setting provides you the option to have your notes automatically updated to a billing status of your choice when they are signed and locked so that the billing process can begin as quickly as possible.

The options you can choose from are:

For Apollo Plus clients

- **No status:** This will require someone to manually change the status after the clinical note is locked so the billing process will begin.
- **Ready to Bill**: This is used when the practice adds its own ICD-10/CPT/HCPCS/modifier codes to the claim. The DrChrono biller will review for items required for billing and will send the claim to the clearinghouse.
- **Ready to Code**: This is used when DrChrono coders review your signed and locked note and enter the appropriate ICD-10/CPT/HCPCS/modifier codes. Once it is coded, the DrChrono coder will refer the claim to the DrChrono biller so it can be prepared and sent to the clearinghouse for processing.

With this setting enabled, you'll be able to easily pass off your charting work to the next step in the billing process without having to manually move each appointment.

For other service plan clients

- You have additional status options available, including creating custom billing statuses depending on your office workflow.
- To add a customized status, please refer to this article. Once added, it will be available in the drop-down menu.

Feature Details

- This feature will not override an already-set billing status. This feature will only transition an appointment's billing status if the status is blank.
- This feature will not undo the billing status change if the note is unlocked.
- Already locked notes will not be impacted. This setting only affects notes that are locked after the setting is enabled.
- Enabling this setting will enable this feature for both the DrChrono mobile EHR and the DrChrono web EHR.
- If no billing status is selected in the setting, no change will occur.

1. To turn on the feature, navigate to **Account > Provider Settings > Medical Billing tab**.

2. Scroll down to the Miscellaneous section. The option is labeled **Auto Set Billing Status**. The option is the fourth one listed; **Change the billing status to ... when the note is locked and the billing status is blank**.

3. Select the drop-down and choose the status that you would like your signed/locked notes to be moved to.

4. Once you've made your selection, be sure to scroll down and select **Update Entire Profile** for your changes to be saved.