

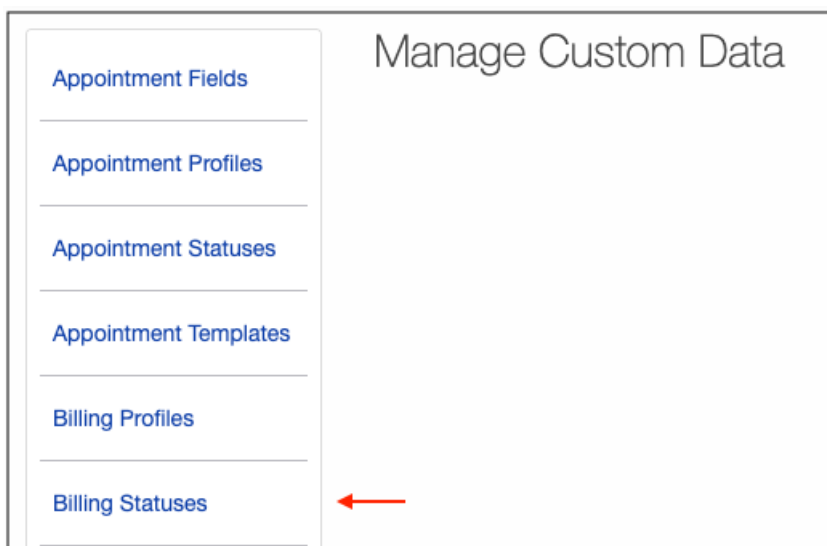
Creating and Archiving Custom Billing Statuses

Last modified on 06/13/2025 2:47 pm EDT

Custom billing statuses are a great way to customize your practice's billing. If your practice has a specific workflow for billing, you can make custom billing statuses to keep track of each step in the process.

Archiving | Demo

1. Hover over **Account** on your navigation bar and select **Custom Fields**.
2. Select **Billing Statuses** on the left-hand navigation bar.



3. On the Custom Billing Statuses page, you can view all your custom billing statuses.

Custom Billing Statuses

Sort (A-Z) + Add New Status

Reserved Billing Status: Auto Accident Claim, Balance Due, Bill Insurance, Bill Secondary Insurance, Cancelled, Durable Medical Equipment Claim, Internal Review, No Show, Paid In Full, Rescheduled, Settled, Worker's Comp Claim.

	Description	Color	Appointments	Updated	Created	
≡	Coding Clarification		0			Edit Archive
≡	Ready to Bill		0			Edit Archive
≡	Ready to Code		0			Edit Archive
≡	Enrollment Pending		1			Edit Archive
≡	Faxed/Mailed Appeal		1			Edit Archive
≡	Payer Contact		0			Edit Archive
≡	Patient Contact		0			Edit Archive

Archived

Name	Description	Archived	Created
No archived billing status			

4. To add a new billing status, select the **+Add New Status** button.

[+ Add New Status](#)

5. Fill out the name, color, and description of the new billing status and press **Save** when complete. Your billing status will now appear on the Custom Billing Statuses page.

Create Custom Billing Status

Name

Color

☒

If this box is checked : The Billing Status will override the Appointment Default Color Scheme along with the Appointment Profile.

Description

Save

Cancel

Archiving a Custom Billing Status

1. To remove a billing status, press the **Archive** button to the right of the billing status you would like to remove.

	Description	Color	Appointments	Updated	Created	
☰	Coding Clarification		0	Jan 17, 2019	Jan 17, 2019	Edit Archive

2. When you archive a billing status, the DrChrono EHR will check if the billing status is being used by any appointments. If the billing status is being used, the following warning will appear. You have the option to archive the status with or without resetting appointments to **Not Submitted**.
3. You may unarchive any archived statuses by selecting the **Unarchive** button on your list of archived statuses.

Archive Custom Billing Status



Are you sure that you want to delete the custom billing status "**Some Legacy Status**"?

1 appointment is using the billing status: Some Legacy Status.
The appointments' billing statuses will be reset to "**Not Submitted**".

If you just want to delete the custom billing status and keep the billing statuses on appointments, click on "Archive Without Resetting".

Cancel

Archive Without Resetting

Archive

Demo
