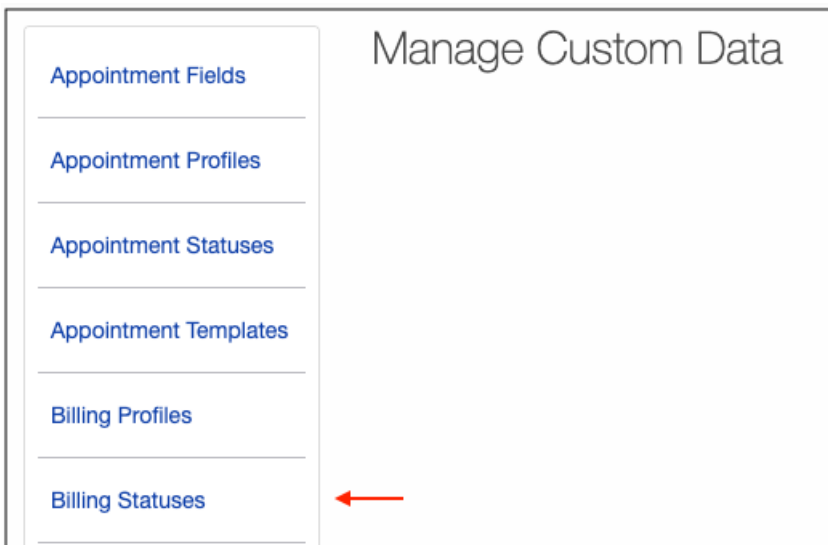


# Creating and Archiving Custom Billing Statuses

Last modified on 11/18/2024 3:24 pm EST

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.

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



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

The image shows a screenshot of the "Custom Billing Statuses" page. At the top right, there are "Sort (A-Z)" and "+ Add New Status" buttons. Below this is a light blue banner with the text: "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." Below the banner is a table with the following columns: Description, Color, Appointments, Updated, and Created. The table contains seven rows of billing statuses, each with an "Edit" button and an "Archive" button. Below the table is an "Archived" section with a table that has columns for Name, Description, Archived, and Created. The archived table currently shows "No archived billing status".

Description	Color	Appointments	Updated	Created	
☰ Coding Clarification		0			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Ready to Bill		0			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Ready to Code		0			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Enrollment Pending		1			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Faxed/Mailed Appeal		1			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Payer Contact		0			<a href="#">Edit</a> <a href="#">Archive</a>
☰ Patient Contact		0			<a href="#">Edit</a> <a href="#">Archive</a>

**Archived**

Name	Description	Archived	Created
No archived billing status			

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



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

## Archiving a Custom Billing Status

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	<input type="button" value="Edit"/> <input type="button" value="Archive"/>

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**.

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".

---