

Adding Billing Profiles in the Live Claims Feed

Last modified on 11/18/2024 3:29 pm EST

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








1. Navigate to **Billing > Live Claims Feed**.
2. Select the **Date of Service** for the appointment to open the billing details screen.


The screenshot shows the 'Live Claims Feed' interface. At the top, there are several filter buttons: 'Select All Offices', 'Select None', 'C new office All', 'Primary Office All', and 'Test office All'. Below these are more filters for 'Claim Type', 'Claim St', 'Billing St', and 'Appt Profiles'. There are also search fields for 'Patient', 'Payer Name', 'Payer ID', 'drc claim #', and 'Clinical Note'. A 'Calculate Counts' button and a 'TFL Warning' checkbox are also present. At the bottom of the filter section, there are buttons for 'Batch Status Change', 'Export to File', 'Custom Export', 'Display', '+ Schedule', and 'Internal'. The main table has columns for 'Info', 'Claim ID', 'Patient', 'Date of Service', 'Office', 'Provider', 'Supervising Provider', 'Billing Provider', 'Billed', 'Allowed', 'Adjmt', 'Ins 1 Paid', 'Ins 2 Paid', 'Pt Paid', 'Ins Bal', 'Pt Line Item Bal', 'Claim Bal', 'Exp Reimbr', 'Ins 1', 'Ins 1 Status', and 'Ins 2'. A red arrow points to the 'Date of Service' column in the first row of the table. The first row shows a claim for 'Jenny Harris' on '11/01/2024 08:00AM' at the 'Primary Office'. The 'Totals' row shows a total of \$1,525.00 Billed, \$1,525.00 Allowed, and \$0.00 Adjmt. The 'Ins 1 Status' column shows 'Not Submitted' with a red triangle icon.

3. Select the profile to be applied from the **Billing Profile** menu drop-down.

The screenshot shows the 'Billing Details' screen for 'Jenny Harris' at 'Primary Office [11] - Exam 1'. At the top, there are buttons for 'View Service', '+ EOB', and 'SuperBill'. Below these are several settings: 'Institutional Claim' (No), 'Billing Status' (dropdown), 'ICD Version' (dropdown), 'Primary Insurer' (dropdown), 'Secondary Insurer' (dropdown), 'Billing Provider:' (dropdown), 'Supervising Provider:' (dropdown), 'Pt Payment' (\$ 0 with a plus button), 'Payment Profile' (dropdown), 'Pt Payment Due' (input field), 'Billing Profile' (dropdown with a plus button and a red arrow pointing to it), 'Billing Pick List' (Choose from Pick List), 'Diagnosis Pick List' (Choose from Pt Problems), and 'Payer pre-auth #' (dropdown).

4. Select **Verify & Save**.

Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
\$0.00	\$175.00	\$0.00	 Not Submitted	 
\$0.00	\$175.00	\$0.00	Not Submitted	  
<input checked="" type="checkbox"/> 0: Settled	<input type="checkbox"/> -----			

 [✓ Verify & Save](#)

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