VIDEO: Applying Billing Profiles

Last modified on 10/11/2024 3:40 pm EDT

Applying Billing Profiles

There are several places in DrChrono where you can apply Billing Profiles to make it easier to populate billing information and reduce time spent.

They include:

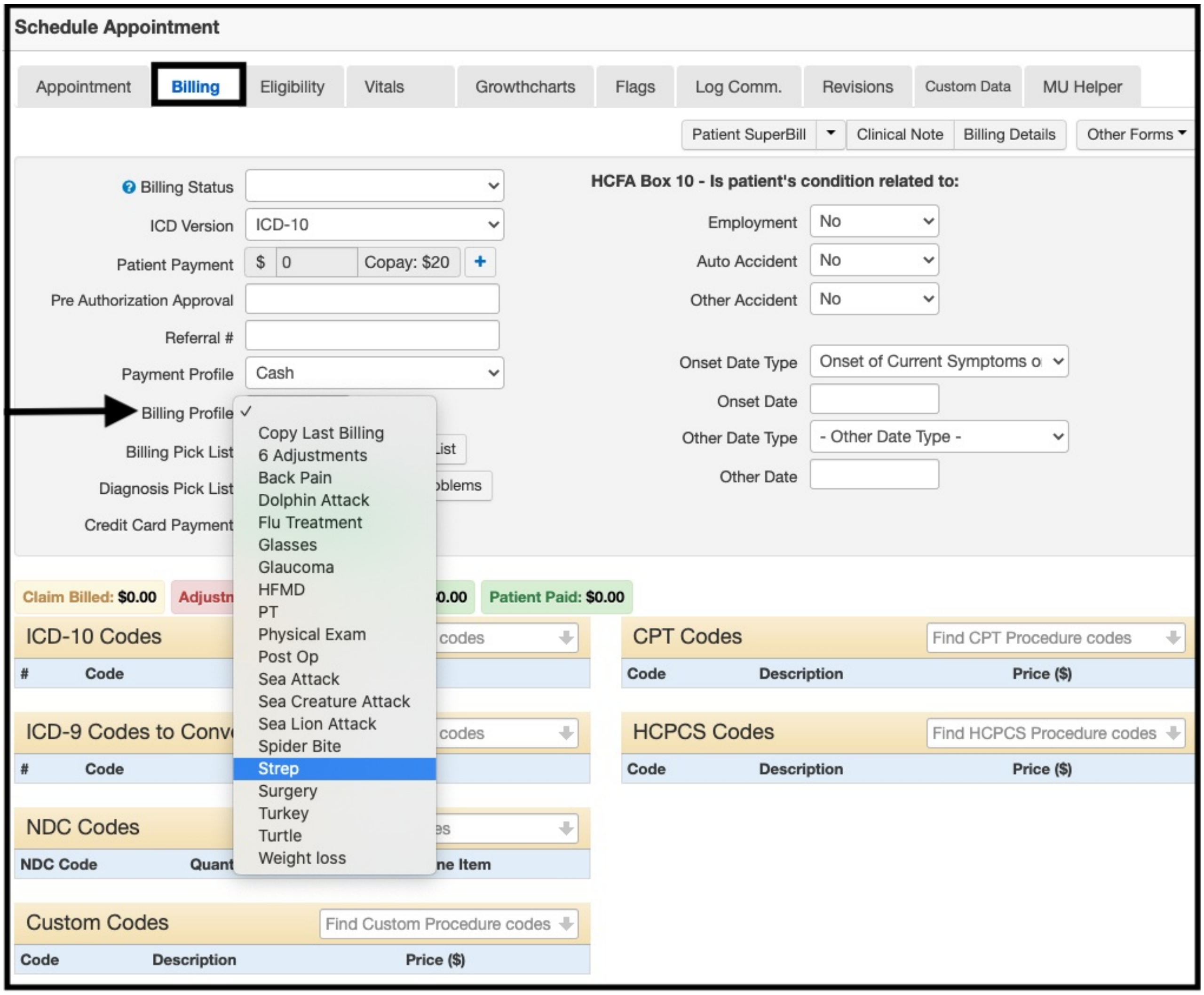
- The appointment window
- The clinical note,
- The live claims feed,
- A switch in the form builder.

For information on creating Billing Profiles, click here.

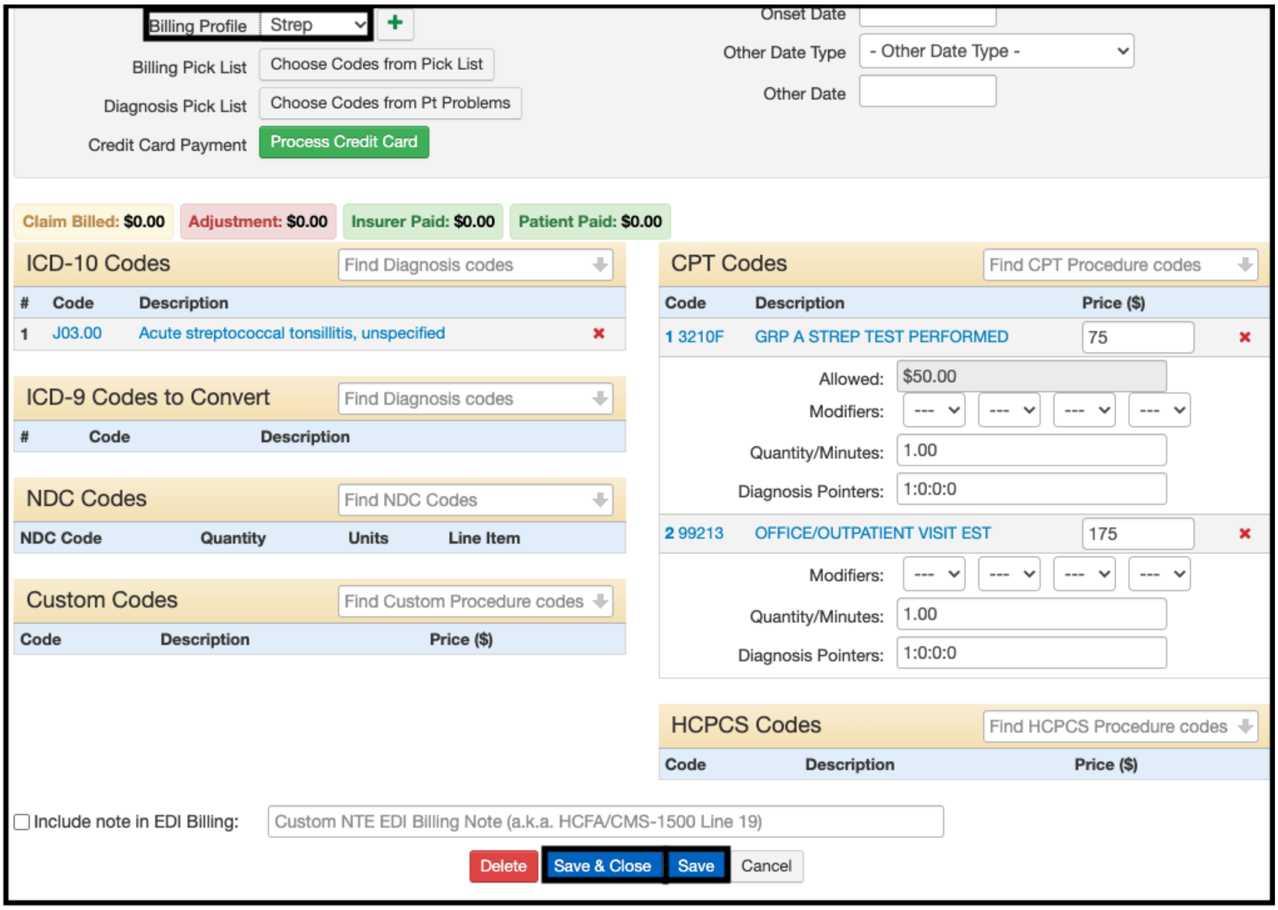
Billing Profiles in the Appointment Window

1. Go to the schedule, open an appointment window, and go to the **Billing** tab.

2. Select the profile you would like to use from the **Billing Profile** dropdown menu.

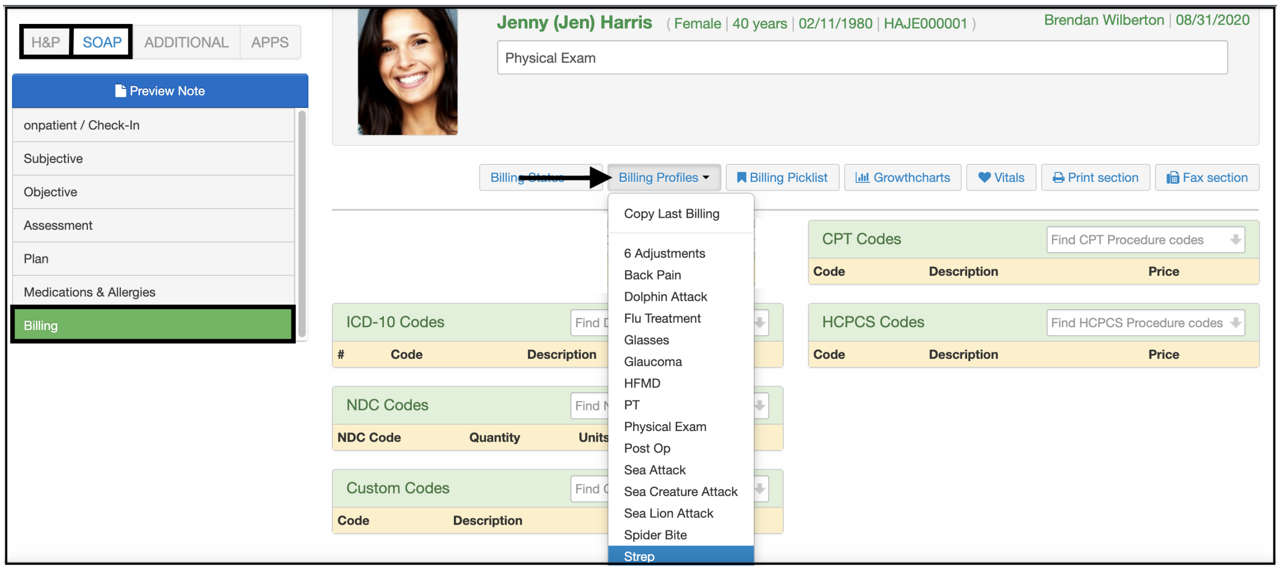


3. Once the profile is selected, click **Save & Close** or **Save**.



Billing Profiles in the Clinical Note

1. Open a clinical note and go to the **Billing** tab under

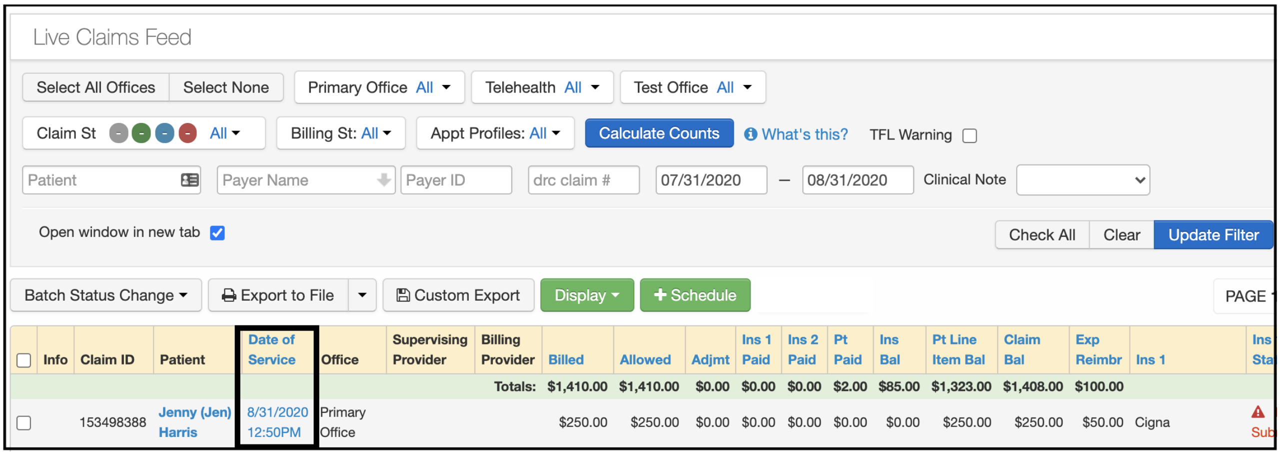


2. Click **OK** to apply the profile to the visit.

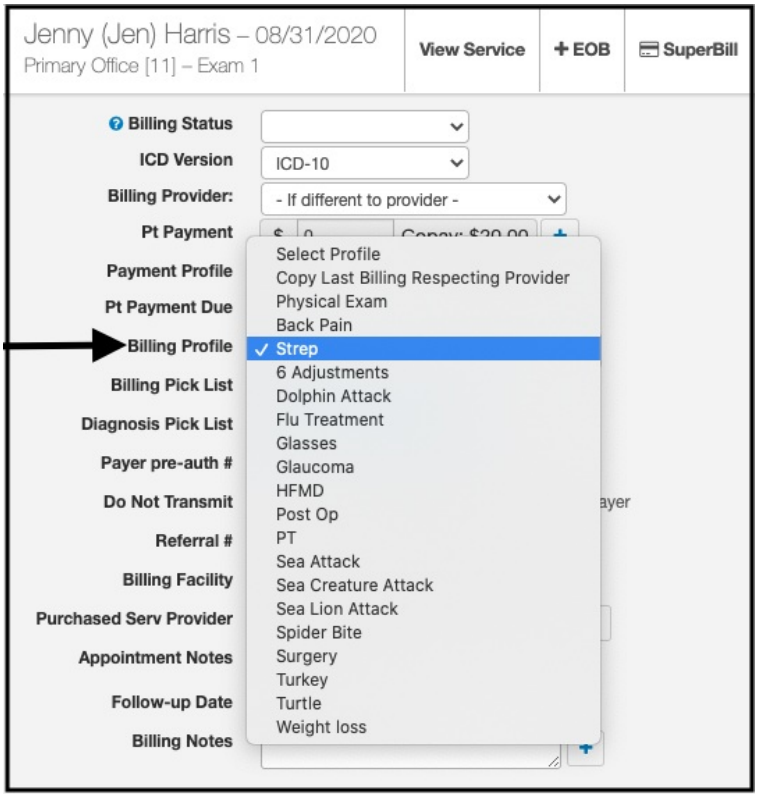
Billing Profiles in the Live Claims Feed

1. Go to **Billing** > **Live Claims Feed**.

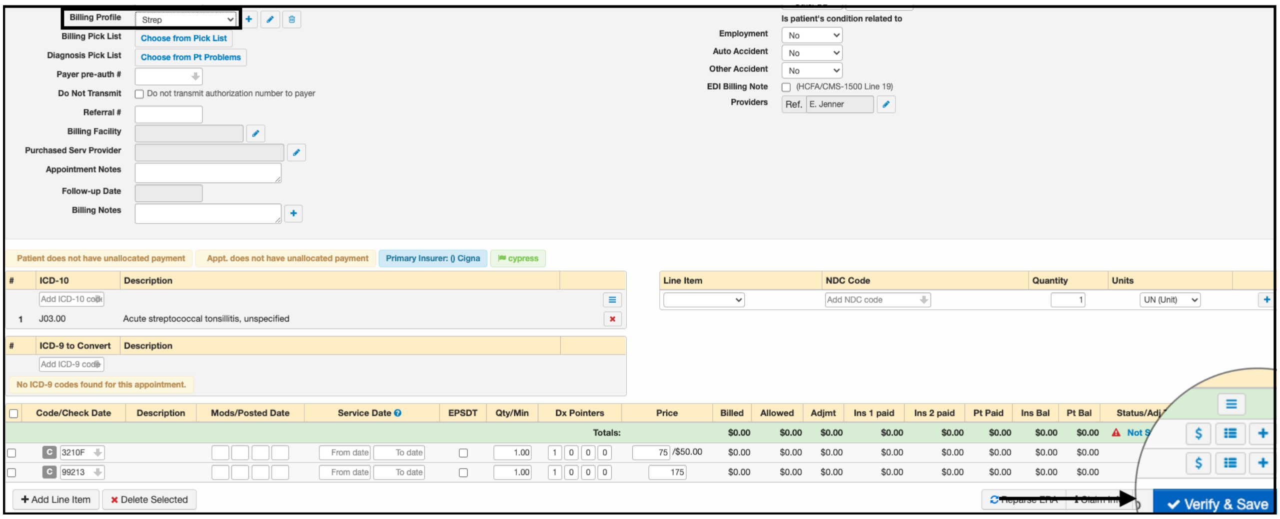
2. Click on the **Date of Service** for the appointment to open the billing details screen.



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



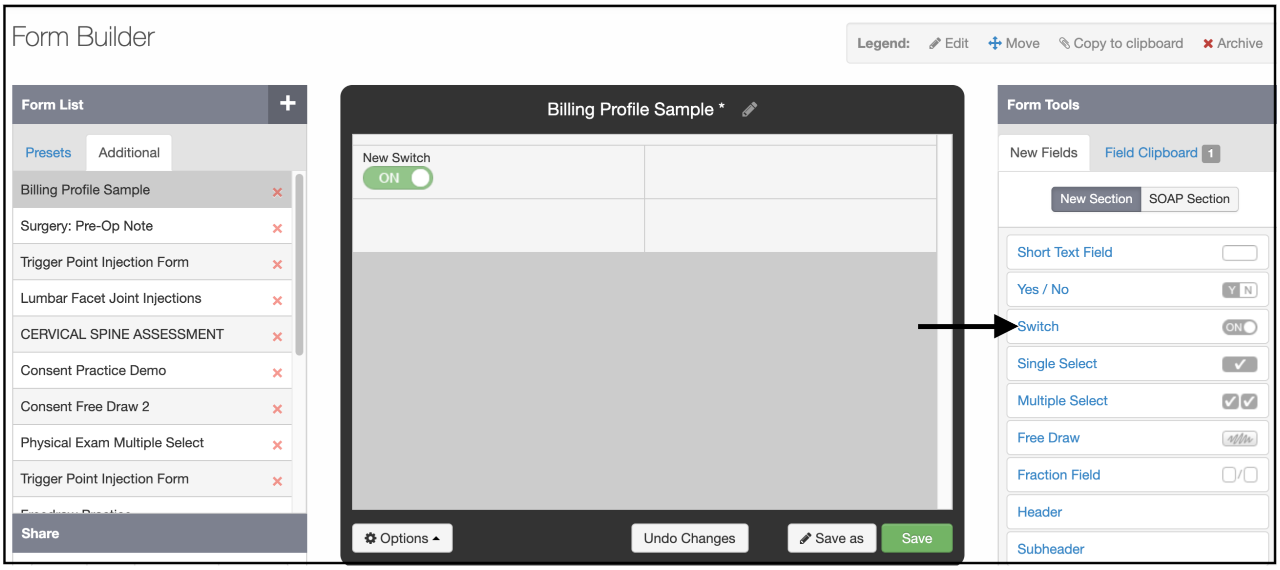
4. Click **Verify & Save**.



Billing Profiles in the Form Builder

1. Go to **Clinical** > **Form Builder**.

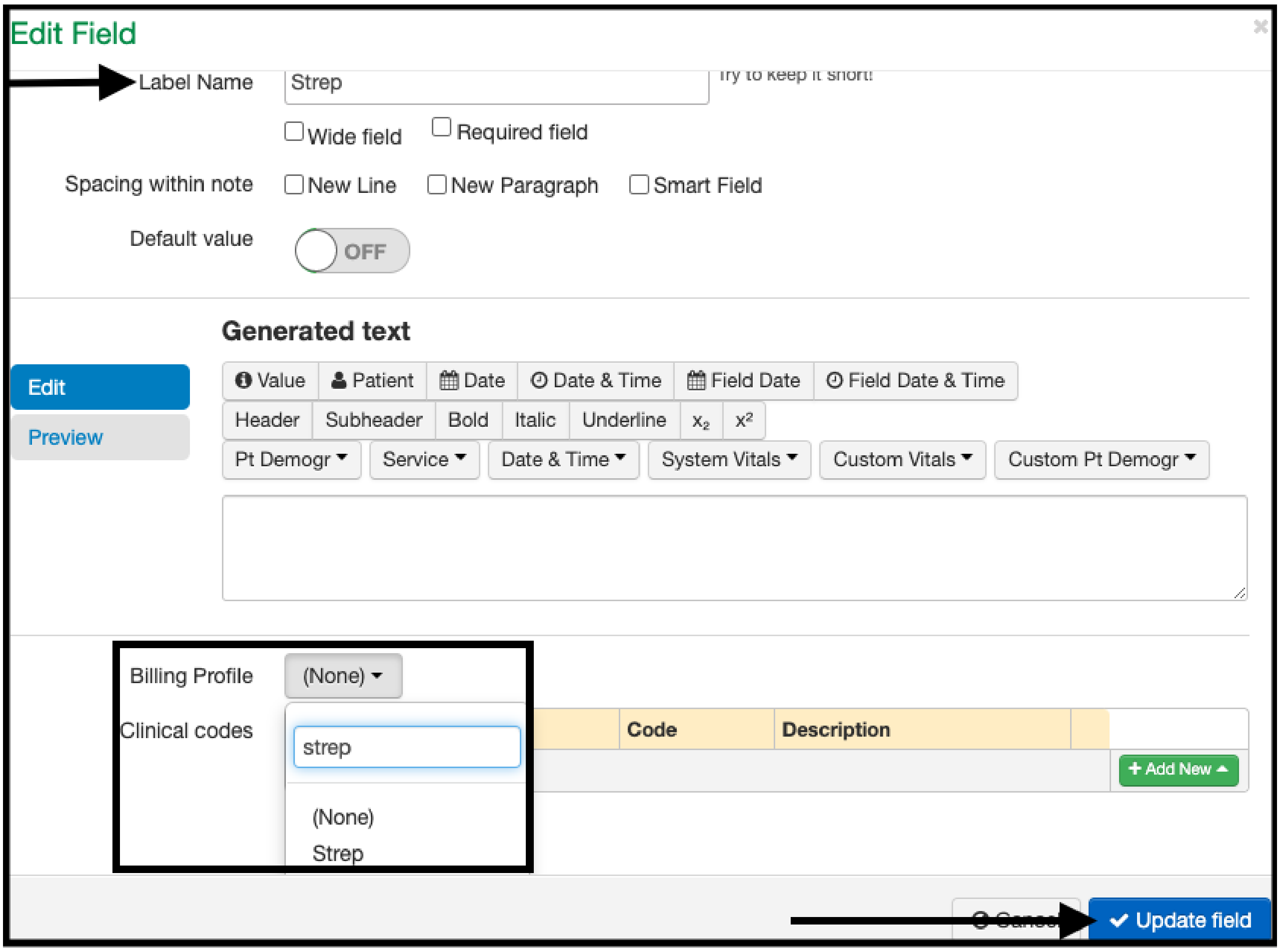
2. Select the form you would like to add the profile to and add a **Switch**.



3. Enter a name for the switch in the **Label Name** field.

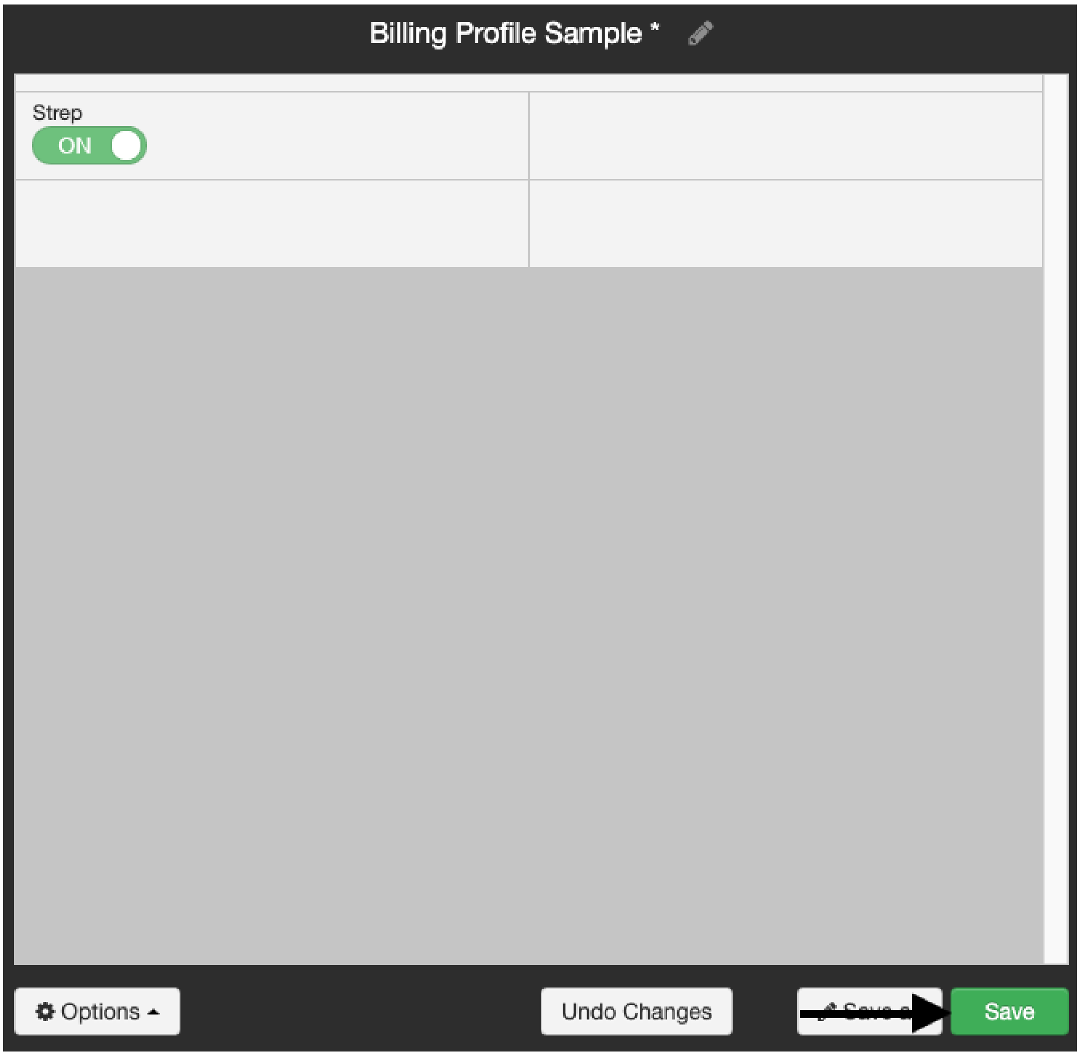
4. Go to the **Billing Profile** menu and select the profile.

5. Click **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.**


Billing Profile Sample *
Strep
ON
Options
Undo Changes
Save