VIDEO: Applying Billing Profiles

Last modified on 09/25/2026 4:40 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.

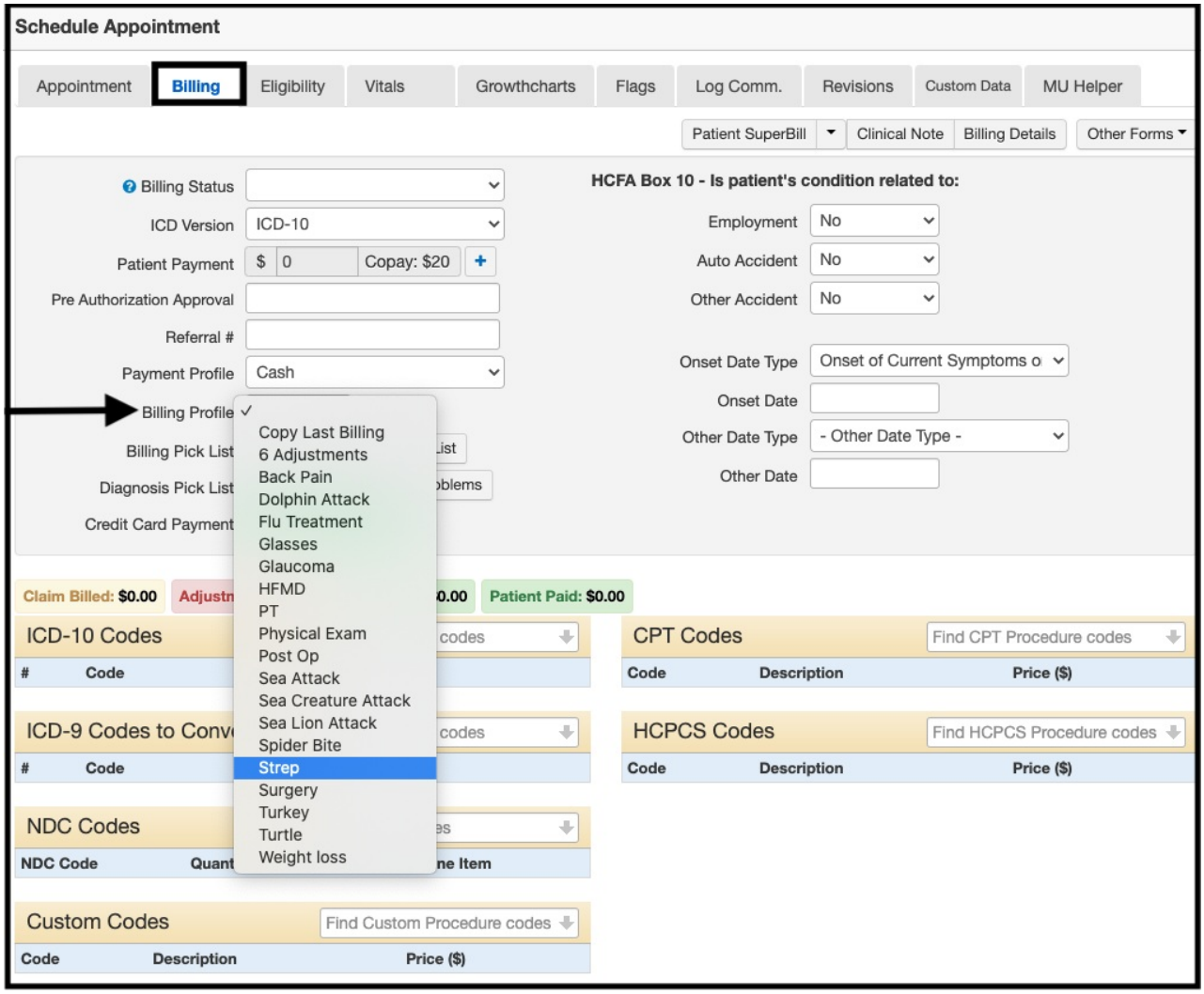
They include:

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

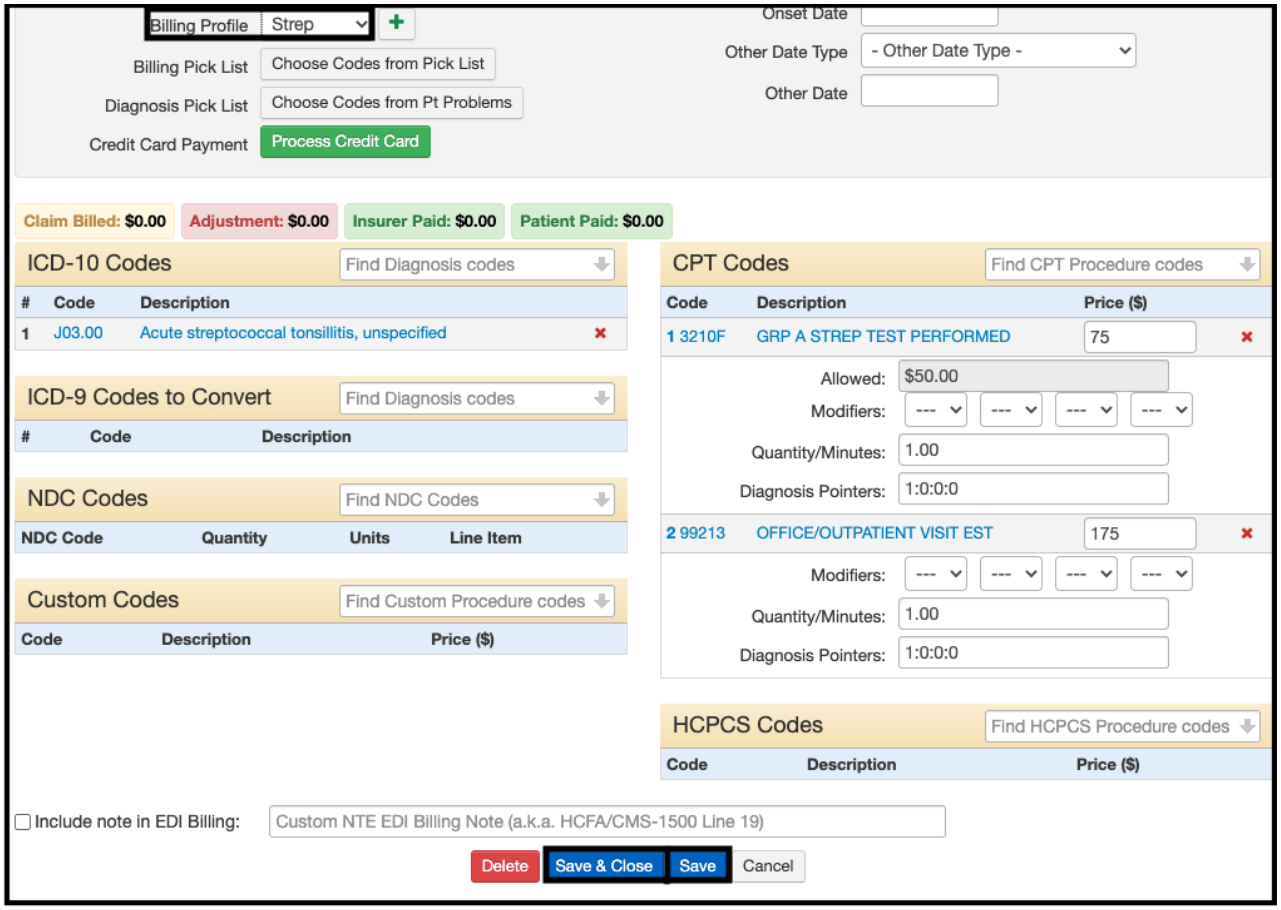
Billing Profiles in the Appointment Window

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.

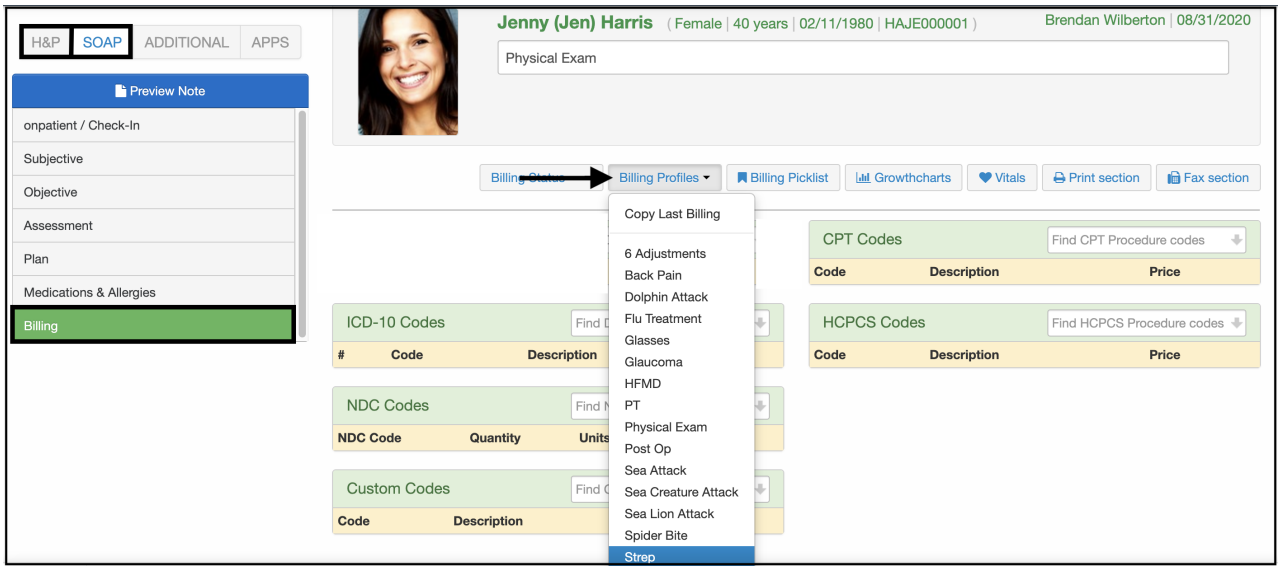


3. Once the profile is selected, click **Save & Close** or **Save**.



Billing Profiles in the Clinical Note

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

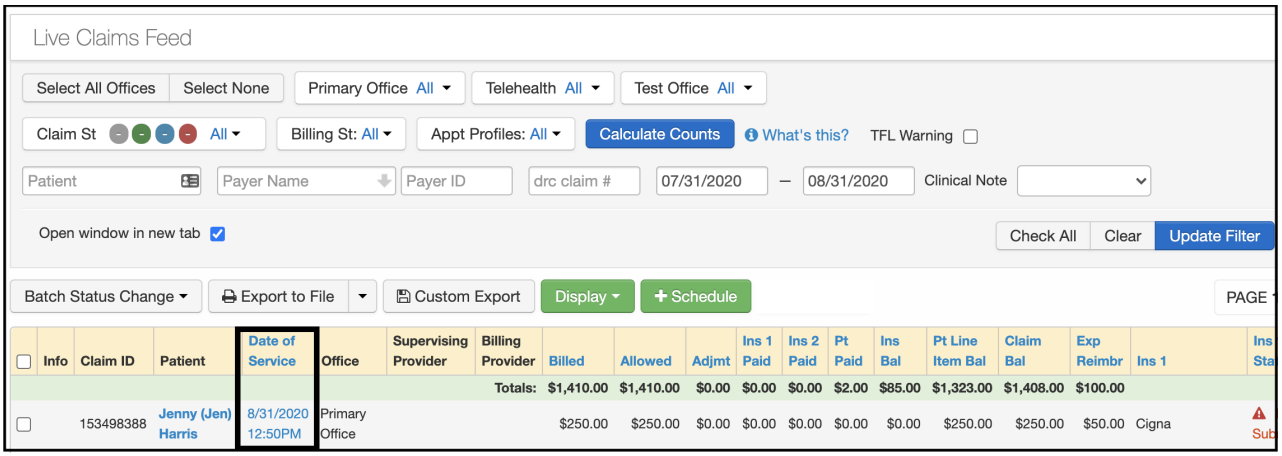


2. Click **OK** to apply the profile to the visit.

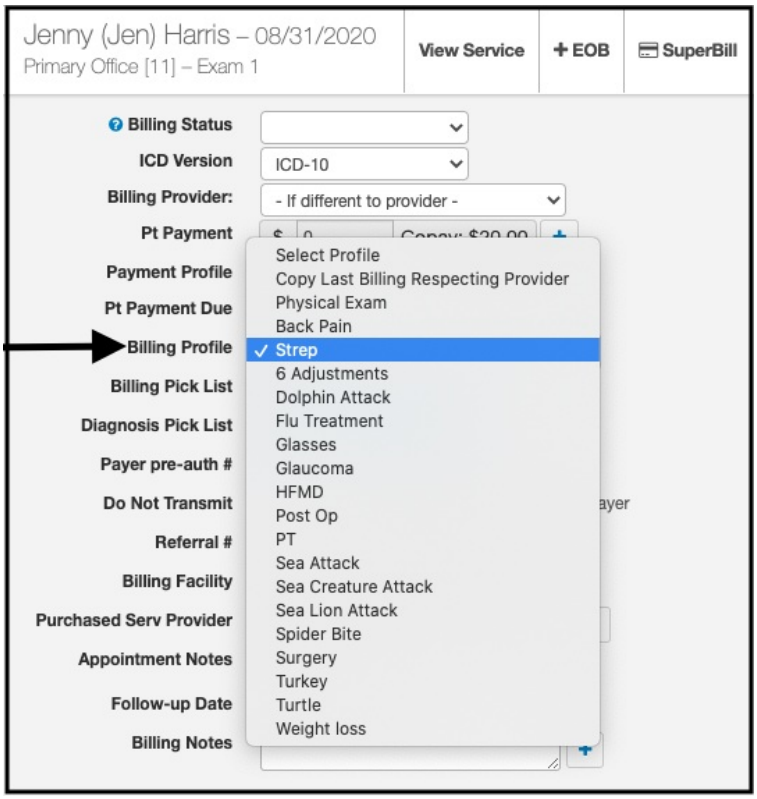
Billing Profiles in the Live Claims Feed

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

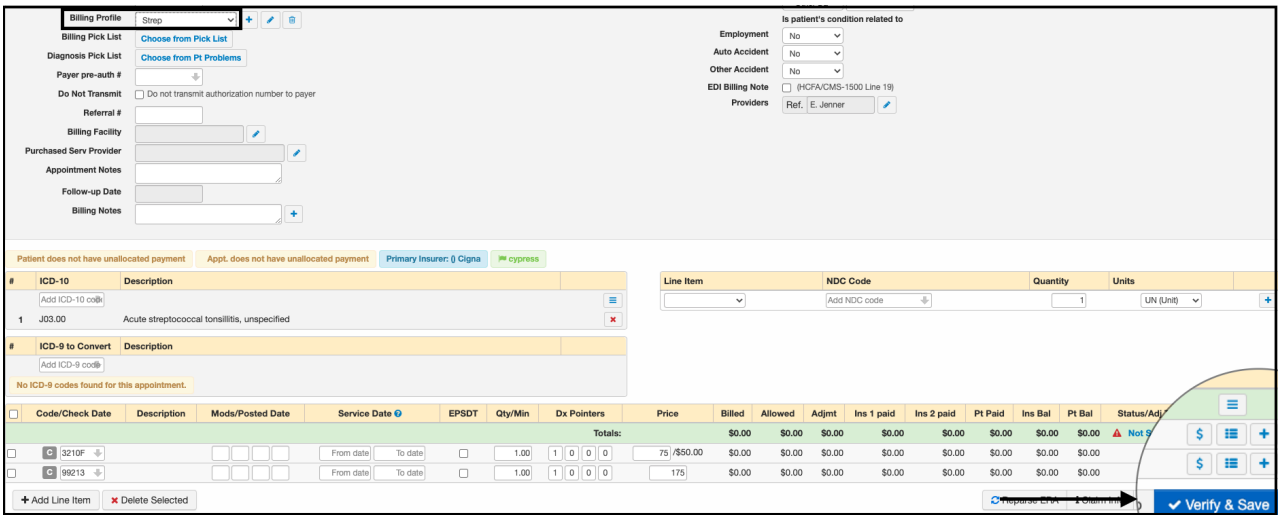
2. Click on the **Date of Service** for the appointment to open the billing details screen.



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



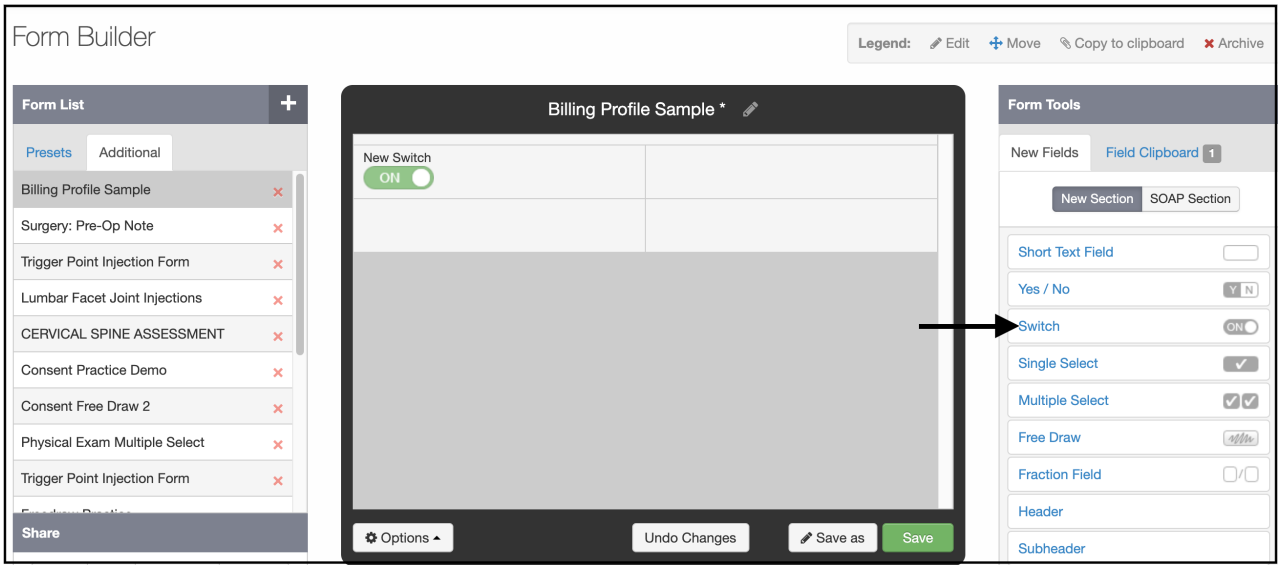
4. Press **Verify & Save**.



Billing Profiles in the Form Builder

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

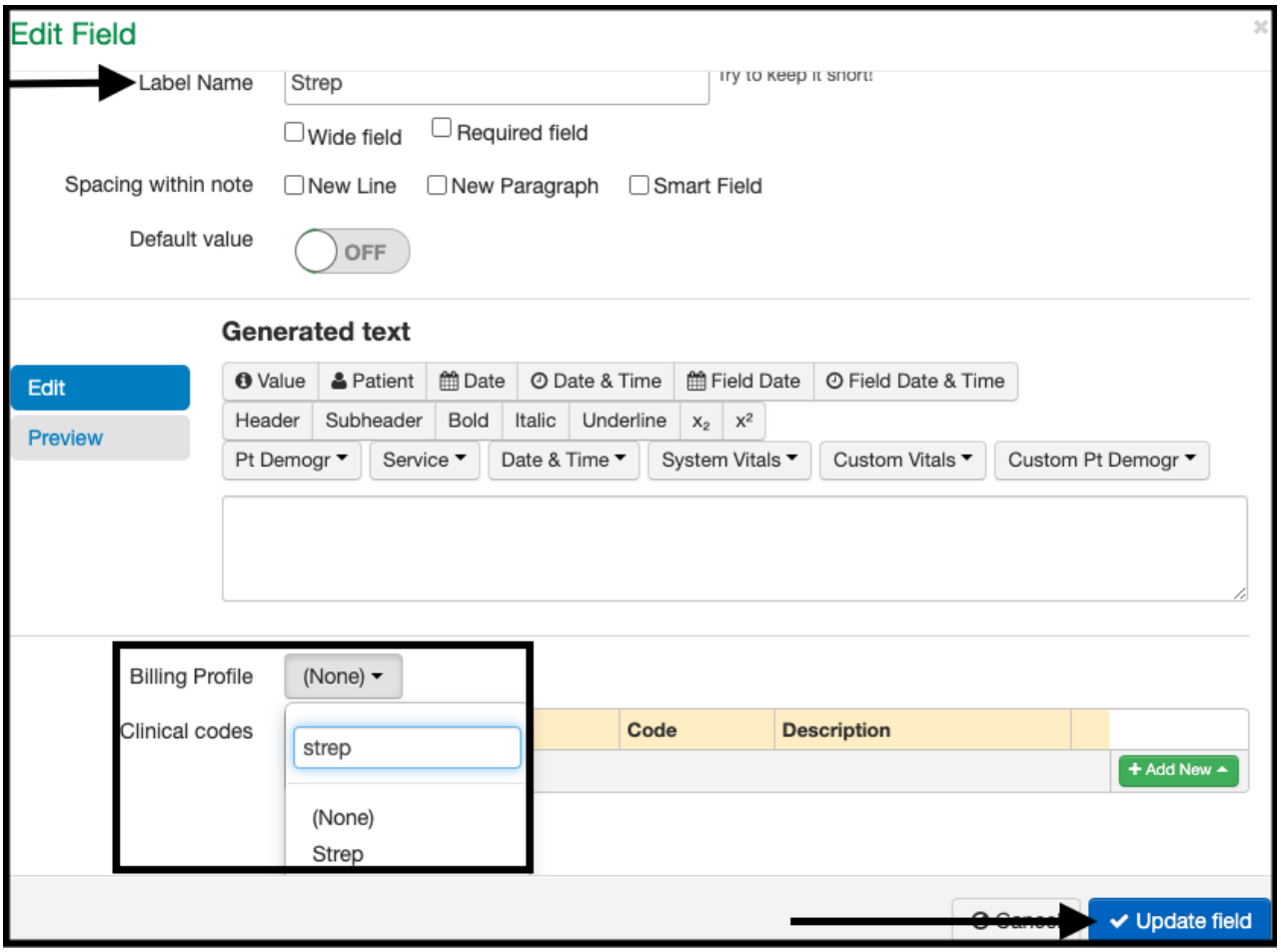
2. Select the form you would like to add the profile to and add a **Switch**.



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

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

5. Press **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.**