

VIDEO: Applying Billing Profiles

08/26/2024 11:49 am 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.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status ICD Version ICD-10 Patient Payment \$ 0 Copay: \$20 Pre Authorization Approval Referral # Payment Profile Cash

HCFA Box 10 - Is patient's condition related to:

Employment No Auto Accident No Other Accident No Onset Date Type Onset of Current Symptoms o Onset Date Other Date Type - Other Date Type - Other Date

Billing Profile ✓
 Billing Pick List
 Diagnosis Pick List
 Credit Card Payment

Copy Last Billing
 6 Adjustments
 Back Pain
 Dolphin Attack
 Flu Treatment
 Glasses
 Glaucoma
 HFMD
 PT
 Physical Exam
 Post Op
 Sea Attack
 Sea Creature Attack
 Sea Lion Attack
 Spider Bite
Strep
 Surgery
 Turkey
 Turtle
 Weight loss

Claim Billed: \$0.00 Adjustments Patient Paid: \$0.00

ICD-10 Codes ICD-9 Codes to Convert NDC Codes Custom Codes

CPT Codes HCPCS Codes

| Code | Description | Price (\$) |
|------|-------------|------------|
|------|-------------|------------|

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

Billing Profile: Strep +

Onset Date:

Billing Pick List: Choose Codes from Pick List

Other Date Type: - Other Date Type -

Diagnosis Pick List: Choose Codes from Pt Problems

Other Date:

Credit Card Payment:

Claim Billed: \$0.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

ICD-10 Codes

| # | Code | Description |
|---|--------|--|
| 1 | J03.00 | Acute streptococcal tonsillitis, unspecified |

ICD-9 Codes to Convert

| # | Code | Description |
|---|------|-------------|
|---|------|-------------|

NDC Codes

| NDC Code | Quantity | Units | Line Item |
|----------|----------|-------|-----------|
|----------|----------|-------|-----------|

Custom Codes

| Code | Description | Price (\$) |
|------|-------------|------------|
|------|-------------|------------|

CPT Codes

| Code | Description | Price (\$) |
|---------|-----------------------------|------------|
| 1 3210F | GRP A STREP TEST PERFORMED | 75 |
| 2 99213 | OFFICE/OUTPATIENT VISIT EST | 175 |

HPCS Codes

| Code | Description | Price (\$) |
|------|-------------|------------|
|------|-------------|------------|

Include note in EDI Billing:

Billing Profiles in the Clinical Note

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

H&P SOAP ADDITIONAL APPS

Preview Note

onpatient / Check-In

Subjective

Objective

Assessment

Plan

Medications & Allergies

Billing

Jenny (Jen) Harris (Female | 40 years | 02/11/1980 | HAJE000001) | Brendan Wilberton | 08/31/2020

Physical Exam

Billing Status → Billing Profiles ↓ Billing Picklist Growthcharts Vitals Print section Fax section

Copy Last Billing

- 6 Adjustments
- Back Pain
- Dolphin Attack
- Flu Treatment
- Glasses
- Glaucoma
- HFMD
- PT
- Physical Exam
- Post Op
- Sea Attack
- Sea Creature Attack
- Sea Lion Attack
- Spider Bite
- Strep

ICD-10 Codes

| # | Code | Description |
|---|------|-------------|
|---|------|-------------|

NDC Codes

| NDC Code | Quantity | Units |
|----------|----------|-------|
|----------|----------|-------|

Custom Codes

| Code | Description |
|------|-------------|
|------|-------------|

CPT Codes

| Code | Description | Price |
|------|-------------|-------|
|------|-------------|-------|

HPCS Codes

| Code | Description | Price |
|------|-------------|-------|
|------|-------------|-------|

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.

Live Claims Feed

Select All Offices | Select None | Primary Office All | Telehealth All | Test Office All

Claim St: All | Billing St: All | Appt Profiles: All | Calculate Counts | What's this? | TFL Warning

Patient: [input] Payer Name: [input] Payer ID: [input] drc claim #: [input] 07/31/2020 - 08/31/2020 Clinical Note: [input]

Open window in new tab Check All Clear Update Filter

Batch Status Change | Export to File | Custom Export | Display | Schedule

| Info | Claim ID | Patient | Date of Service | Office | 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 Sta |
|--------------------------|-----------|--------------------|-------------------|----------------|----------------------|------------------|------------|------------|--------|------------|------------|---------|---------|------------------|------------|------------|-------|---------|
| Totals: | | | | | | | \$1,410.00 | \$1,410.00 | \$0.00 | \$0.00 | \$0.00 | \$2.00 | \$85.00 | \$1,323.00 | \$1,408.00 | \$100.00 | | |
| <input type="checkbox"/> | 153498388 | Jenny (Jen) Harris | 8/31/2020 12:50PM | Primary Office | | | \$250.00 | \$250.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$250.00 | \$250.00 | \$50.00 | Cigna | Sub |

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

Jenny (Jen) Harris – 08/31/2020
Primary Office [11] – Exam 1

View Service + EOB SuperBill

Billing Status: [dropdown]
 ICD Version: ICD-10
 Billing Provider: - If different to provider -
 Pt Payment: [input]
 Payment Profile: [dropdown]
 Pt Payment Due: [input]
 Billing Profile: **Strep** (selected)
 Billing Pick List: 6 Adjustments, Dolphin Attack, Flu Treatment, Glasses, Glaucoma, HFMD, Post Op, PT, Sea Attack, Sea Creature Attack, Sea Lion Attack, Spider Bite, Surgery, Turkey, Turtle, Weight loss
 Diagnosis Pick List: [dropdown]
 Payer pre-auth #: [input]
 Do Not Transmit: [input]
 Referral #: [input]
 Billing Facility: [input]
 Purchased Serv Provider: [input]
 Appointment Notes: [input]
 Follow-up Date: [input]
 Billing Notes: [input]

4. Click **Verify & Save**.

The screenshot shows a medical billing interface. At the top, there are dropdown menus for 'Billing Profile' (set to 'Strip'), 'Billing Pick List', and 'Diagnosis Pick List'. Below these are fields for 'Payer pre-auth #', 'Do Not Transmit', 'Referral #', 'Billing Facility', 'Purchased Serv Provider', 'Appointment Notes', 'Follow-up Date', and 'Billing Notes'. On the right, there are checkboxes for 'Employment', 'Auto Accident', 'Other Accident', and 'EDI Billing Note', along with a 'Providers' field set to 'Ref. E. Jenner'. A summary bar indicates 'Patient does not have unallocated payment' and 'Appt. does not have unallocated payment', with 'Primary Insurer: Cigna' and 'cypress' logos. Below this is a table with columns for 'ICD-10', 'Description', 'Line Item', 'NDC Code', 'Quantity', and 'Units'. The first row shows 'J03.00 Acute streptococcal tonsillitis, unspecified' with a quantity of 1. A second table below it has columns for 'Code/Check Date', 'Description', 'Moda/Posted Date', 'Service Date', 'EPSDT', 'Qty/Min', 'Dx Pointers', 'Price', 'Billed', 'Allowed', 'Adjmt', 'Ins 1 paid', 'Ins 2 paid', 'Pt Paid', 'Ins Bal', 'Pt Bal', and 'Status/Adj'. The 'Totals' row shows a price of 75/\$50.00. At the bottom right, a blue button labeled 'Verify & Save' is highlighted with a red circle and an arrow.

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**.

The screenshot shows the 'Form Builder' interface. On the left is a 'Form List' with a 'Presets' tab and an 'Additional' tab. The 'Billing Profile Sample' form is selected. The main area shows a preview of the form with a 'New Switch' widget that is currently 'ON'. On the right is the 'Form Tools' panel, which has a 'New Fields' section and a 'Field Clipboard' with 1 item. The 'New Fields' section includes options for 'Short Text Field', 'Yes / No', 'Switch', 'Single Select', 'Multiple Select', 'Free Draw', 'Fraction Field', 'Header', and 'Subheader'. An arrow points from the 'Switch' option in the 'Form Tools' panel to the 'New Switch' widget in the form preview. At the bottom of the form preview, there are buttons for 'Options', 'Undo Changes', 'Save as', and 'Save'.

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**.

Edit Field

Label Name: Strep try to keep it short!

Wide field Required field

Spacing within note: New Line New Paragraph Smart Field

Default value: OFF

Generated text

Edit **Preview**

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x_2 x^2

Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr

| Code | Description |
|-------|-------------|
| strep | |

+ Add New

Cancel **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 *


Step

ON



 Options ▲

Undo Changes

~~Save~~ 

Save