

VIDEO: Applying Billing Profiles

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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 # Code ICD-9 Codes to Convert # Code NDC Codes NDC Code Quant Custom Codes Code Description Price (\$)

CPT Codes Find CPT Procedure codes Code Description Price (\$)

HCPCS Codes Find HCPCS Procedure 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
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NDC Codes

NDC Code	Quantity	Units	Line Item
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Custom Codes

Code	Description	Price (\$)
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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 (\$)
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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: [] Payer Name: [] Payer ID: [] drc claim #: [] 07/31/2020 - 08/31/2020 Clinical Note: []

Open window in new tab Check All Clear Update Filter

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

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: []
 ICD Version: ICD-10
 Billing Provider: - If different to provider -
 Pt Payment: []
 Payment Profile: []
 Pt Payment Due: []
Billing Profile: []
 Billing Pick List: []
 Diagnosis Pick List: []
 Payer pre-auth #: []
 Do Not Transmit: []
 Referral #: []
 Billing Facility: []
 Purchased Serv Provider: []
 Appointment Notes: []
 Follow-up Date: []
 Billing Notes: []

- Select Profile
- Copy Last Billing Respecting Provider
- Physical Exam
- Back Pain
- Strep**
- 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

4. Click **Verify & Save**.

The screenshot shows a complex medical billing form. At the top, there are sections for 'Billing Profile' (set to 'Strip'), 'Billing Pick List', 'Diagnosis Pick List', and 'Payer pre-auth #'. Below these are fields for 'Do Not Transmit', 'Referral #', 'Billing Facility', 'Purchased Serv Provider', 'Appointment Notes', 'Follow-up Date', and 'Billing Notes'. On the right side, there are dropdown menus for 'Employment', 'Auto Accident', 'Other Accident', and 'EDI Billing Note', along with a 'Providers' field set to 'Ref. E. Jenner'. A status bar indicates 'Patient does not have unallocated payment' and 'Appt. does not have unallocated payment'. The main area contains a table with 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'. A 'Totals' row shows values for 'Billed' (\$0.00), 'Allowed' (\$0.00), 'Adjmt' (\$0.00), 'Ins 1 paid' (\$0.00), 'Ins 2 paid' (\$0.00), 'Pt Paid' (\$0.00), 'Ins Bal' (\$0.00), and 'Pt Bal' (\$0.00). A 'Verify & Save' button is highlighted in the bottom right corner.

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' field set to 'ON'. On the right is a 'Form Tools' panel with a 'Legend' (Edit, Move, Copy to clipboard, Archive) and a 'Field Clipboard' with 1 item. The 'Form Tools' panel includes a 'New Section' button (labeled 'SOAP Section') and various field types: 'Short Text Field', 'Yes / No', 'Switch' (highlighted with an arrow), 'Single Select', 'Multiple Select', 'Free Draw', 'Fraction Field', 'Header', and 'Subheader'. At the bottom of the form preview 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 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**

Code	Description
strep	
(None)	
Strep	

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