

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

Billing

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

Billing Status	Employment
ICD Version	Auto Accident
Patient Payment	Other Accident
Pre Authorization Approval	Onset Date Type
Referral #	Onset Date
Payment Profile	Other Date Type
Billing Profile	Other Date

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

ICD-10 Codes		CPT Codes		
#	Code	Code	Description	Price (\$)

ICD-9 Codes to Convert		HCPCS Codes		
#	Code	Code	Description	Price (\$)

NDC Codes	
NDC Code	Quantity

Custom Codes		
Code	Description	Price (\$)

Strep

Find CPT Procedure codes

Find HCPCS Procedure codes

Find Custom Procedure codes

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
Surgery
Turkey
Turtle
Weight loss

None Item

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

Billing Profile Strep +

Billing Pick List Choose Codes from Pick List

Diagnosis Pick List Choose Codes from Pt Problems

Credit Card Payment Process Credit Card

Onset Date

Other Date Type

Other Date

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

ICD-10 Codes Find Diagnosis codes

#	Code	Description	Delete
1	J03.00	Acute streptococcal tonsillitis, unspecified	×

CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)	Delete
1 3210F	GRP A STREP TEST PERFORMED	75	×
Allowed: \$50.00 Modifiers: --- --- --- --- Quantity/Minutes: 1.00 Diagnosis Pointers: 1:0:0			
2 99213	OFFICE/OUTPATIENT VISIT EST	175	×
Modifiers: --- --- --- --- Quantity/Minutes: 1.00 Diagnosis Pointers: 1:0:0			

ICD-9 Codes to Convert Find Diagnosis codes

#	Code	Description
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HCPCS Codes Find HCPCS Procedure codes

Code	Description	Price (\$)
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Include note in EDI Billing: Custom NTE EDI Billing Note (a.k.a. HCFA/CMS-1500 Line 19)

Delete Save & Close Save Cancel

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 Profiles Billing Picklist Growthcharts Vitals Print section Fax section

Billing Profiles Copy Last Billing

Code	Description	Price
6 Adjustments		\$0.00
Back Pain		\$0.00
Dolphin Attack		\$0.00
Flu Treatment		\$0.00
Glasses		\$0.00
Glaucoma		\$0.00
HFMD		\$0.00
PT		\$0.00
Physical Exam		\$0.00
Post Op		\$0.00
Sea Attack		\$0.00
Sea Creature Attack		\$0.00
Sea Lion Attack		\$0.00
Spider Bite		\$0.00
Strep		\$0.00

ICD-10 Codes Find Diagnosis codes

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

CPT Codes Find CPT Procedure codes

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

NDC Codes Find NDC Codes

NDC Code	Quantity	Units	Line Item
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HCPCS Codes Find HCPCS Procedure codes

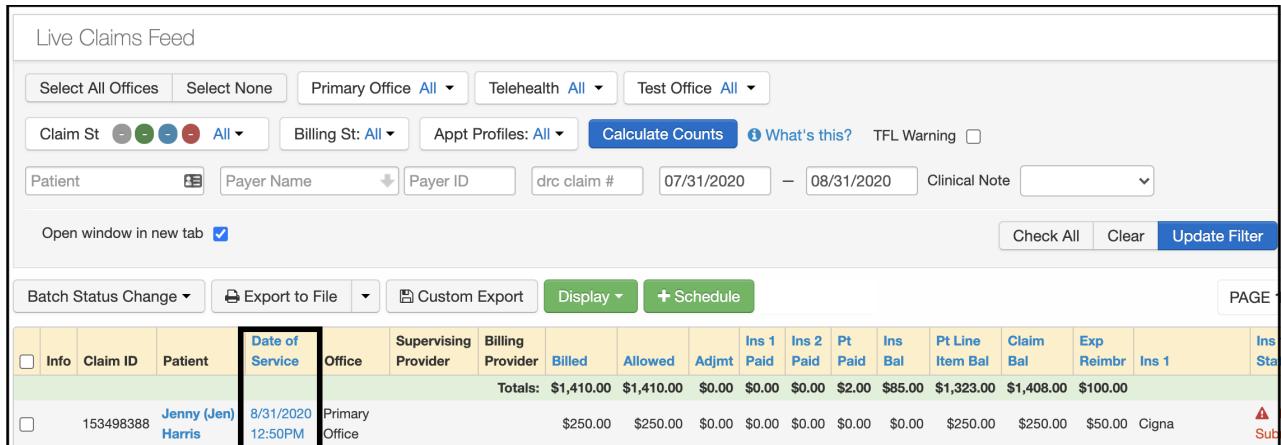
Code	Description	Price (\$)
------	-------------	------------

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

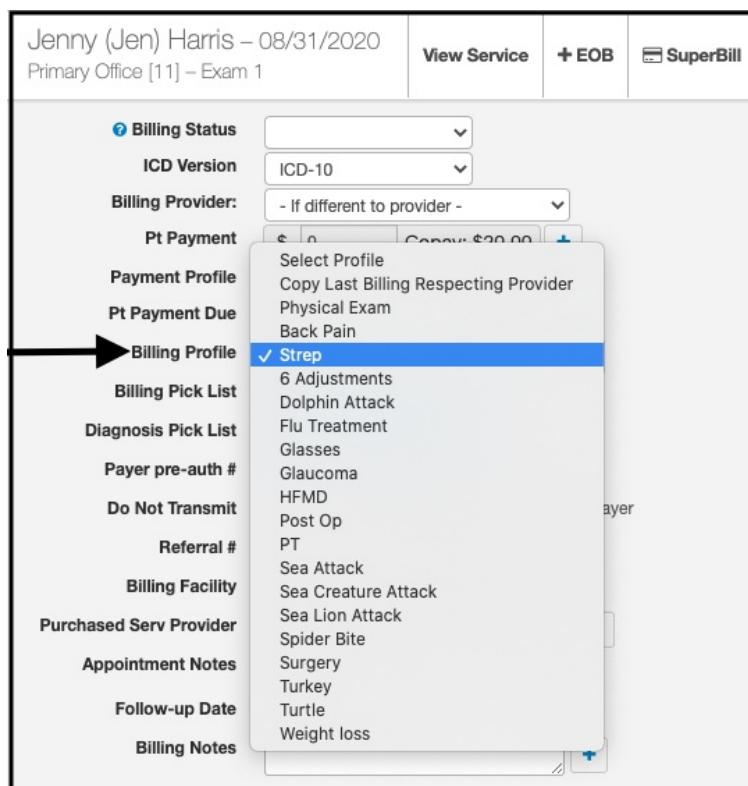
Patient Payer Name Payer ID drc claim # 07/31/2020 - 08/31/2020 Clinical Note

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 St
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	A 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** **Billing 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**

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. Press Verify & Save.

The screenshot shows a medical billing software interface. At the top, there are sections for Billing Profile (set to 'Strep'), Billing Pick List, Diagnosis Pick List, Payer pre-auth #, Do Not Transmit, Referral #, Billing Facility, Purchased Serv Provider, Appointment Notes, Follow-up Date, and Billing Notes. To the right, there are dropdowns for Employment, Auto Accident, Other Accident, and EDI Billing Notes, along with a Ref. field set to 'E. Jenner'. Below these are buttons for 'Patient does not have unallocated payment' and 'Appt. does not have unallocated payment'. The 'Primary Insurer' is listed as '0 Cigna' with 'cypress' as the provider. The 'Line Item' table shows a single entry for 'J03.00 Acute streptococcal tonsillitis, unspecified'. The table includes columns for Line Item, NDC Code, Quantity, and Units. The quantity is 1 and the unit is 'UN (Unit)'. The 'Verify & Save' button is highlighted with a large green 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, a 'Form List' sidebar shows various form profiles: 'Billing Profile Sample', 'Surgery: Pre-Op Note', 'Trigger Point Injection Form', 'Lumbar Facet Joint Injections', 'CERVICAL SPINE ASSESSMENT', 'Consent Practice Demo', 'Consent Free Draw 2', 'Physical Exam Multiple Select', and 'Trigger Point Injection Form'. Below this is a 'Share' button. In the center, a modal window titled 'Billing Profile Sample' is open, showing a 'New Switch' button with an 'ON' toggle. At the bottom of the modal are 'Options ▾', 'Undo Changes', 'Save as', and 'Save' buttons. On the right, a 'Form Tools' sidebar contains a 'Field Clipboard' section with a count of 1, and a list of field types: 'New Fields', 'Short Text Field', 'Yes / No', 'Switch' (which is highlighted with a large black arrow), 'Single Select', 'Multiple Select', 'Free Draw', 'Fraction Field', 'Header', and 'Subheader'.

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**.

Label Name: Strep

Default value: OFF

Generated text:

Billing Profile	(None) ▾
Clinical codes	strep

Code Description

+ 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 *



Strep

ON



⚙ Options ▾

Undo Changes

Save

Save