

# 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

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

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

Claim Billed: \$0.00

Adjustment

0.00

Patient Paid: \$0.00

ICD-10 Codes

Find ICD-10 Procedure codes

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

ICD-9 Codes to Convert

Find ICD-9 Procedure codes

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

NDC Codes

Find NDC Procedure codes

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

Custom Codes

Find Custom Procedure 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** +

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 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
1	J03.00	Acute streptococcal tonsillitis, unspecified

**ICD-9 Codes to Convert** Find Diagnosis codes

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

**NDC Codes** Find NDC Codes

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

**Custom Codes** Find Custom Procedure codes

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

**CPT Codes** Find CPT Procedure codes

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

Allowed: \$50.00

Modifiers: --- --- --- ---

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0:0

**HCPSC Codes** Find HCPSC Procedure codes

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

☐ 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 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** Find ICD-10 Codes

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

**NDC Codes** Find NDC Codes

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

**Custom Codes** Find Custom Codes

Code	Description
------	-------------

**CPT Codes** Find CPT Procedure codes

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

**HCPSC Codes** Find HCPSC 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 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 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

Billing Profile dropdown menu:

- 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. Press **Verify & Save**.

The screenshot shows a complex medical billing form. At the top, there are dropdown menus for 'Billing Profile' 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'. To the right, there are checkboxes for 'Employment', 'Auto Accident', 'Other Accident', and 'EDI Billing Note', along with a 'Providers' field. A table at the bottom lists various codes and their corresponding prices. A blue button labeled 'Verify & Save' is located at the bottom right of the form.

## 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 various forms like 'Billing Profile Sample', 'Surgery: Pre-Op Note', 'Trigger Point Injection Form', etc. The central workspace is titled 'Billing Profile Sample \*' and contains a 'New Switch' button. On the right is a 'Form Tools' panel with options for 'New Fields', 'Field Clipboard', and various field types. A blue arrow points from the 'Switch' option in the 'Form Tools' panel to the 'New Switch' button in the central workspace.

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**.

✕

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

Billing Profile

(None)

Clinical codes

strep

(None)

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 <div>ON <input type="checkbox"/></div>	

Options ▴

Undo Changes

Save

→

Save