Connecting Billing and Appointment Profiles

08/26/2024 11:54 am EDT

Connecting Billing and Appointment Profiles

Once you have created both a billing profile and an appointment profile, you can connect them. When connected, any appointment scheduled using an appointment profile will also have the billing codes associated with the appointment populated.

1. Navigate to **Schedule** > **Appointment Profiles**.

2. Under the **Billing Profile** column header, you can see the profile connected to the Appointment Profile.

3. Click **Edit** to open the appointment info.

4. Select the profile you need from the **Billing Profile** menu.

5. Click **Save** when finished.

Edit Custom Appointment Profile ✕
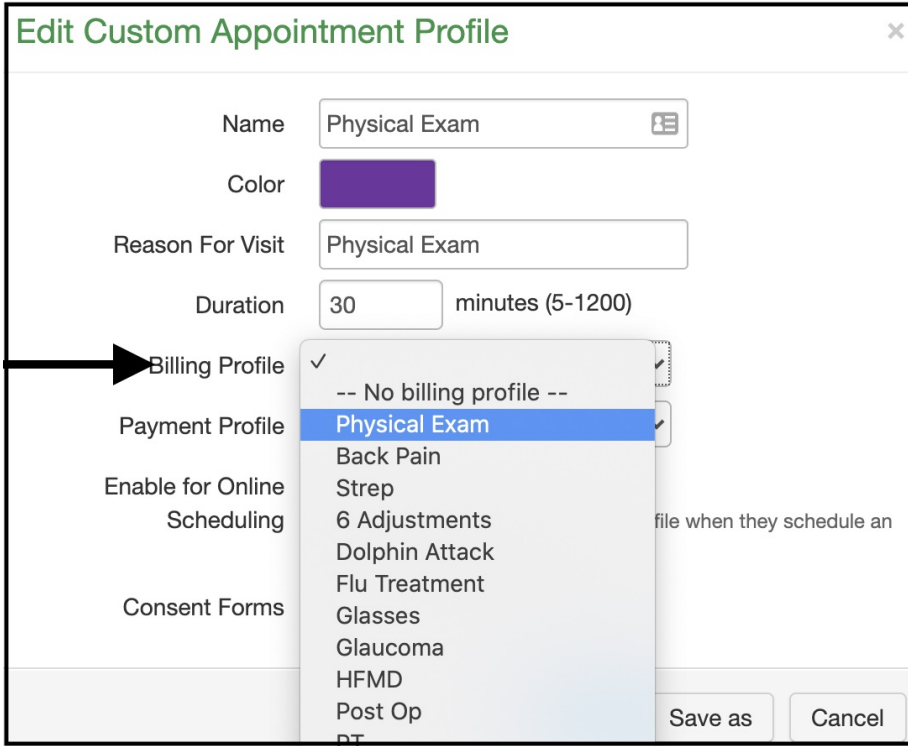
Name	Physical Exam
Color	[purple]
Reason For Visit	Physical Exam
Duration	30 minutes (5-1200)
Billing Profile	Physical Exam ▾
Payment Profile	▾
Enable for Online Scheduling	☐ Allow your patients to select this profile when they schedule an appointment with you online
Consent Forms	☐ Check to select consent forms

➡ Save   Save as   Cancel

6. Select the desired Appointment Profile from the **Profile** dropdown in the menu and **Save**. The appointment and billing information connected to the profile will populate the appointment window.

Schedule Appointment ✕

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

Type ⦿ Appointment ○ Video Visit ☐ Walk-in ☐ Transition of Care ☐ Referral

WARNING: This patient is pre-populated sample data. Credit: $2.00 54 past appointments Primary Insurance: Aetna Better Health of New Jersey [46320]

CDS: Mammogram screening for all women aged 40-74 ⚑ Fall Risk: ⚑ Gestational Diabetes: ⚑ Likes Cats:

Provider	Dr. James Smith ▾	**Supervising**	- If different to provider - ▾
Patient	Jenny (Jen) Harris - 02/11/1980 ▾ ➕ ✏ ⮌	Office:	Office 1 ▾ ➕ ✏
Reason:	Physical Exam	Profile:	Physical Exam ▾
		Eligibility Profile:	--------- ▾
Scheduled:	08/29/2022 Time 08:50AM ⇅	Exam:	Exam 1 ▾
Duration:	30 minutes ☐ Allow overlapping	Color:	[purple]
Notes:		Status:	▾
			> 24h
Consent Forms:	✕ HIPAA Data Use Agreement (default) ✕ No Show Policy (default)		✎ View Clinical Note
			View All Appointments

☐ Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
☐ Arrange a Follow-up Reminder
☑ View Active Reminders: