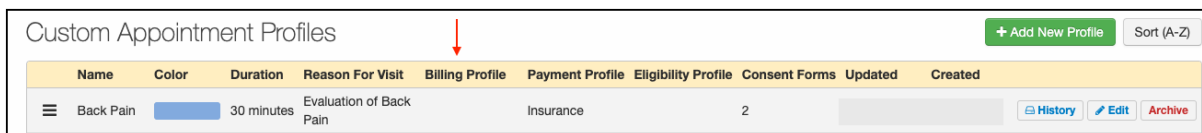



# Connecting Billing and Appointment Profiles

Last modified on 11/01/2024 10:51 am EDT

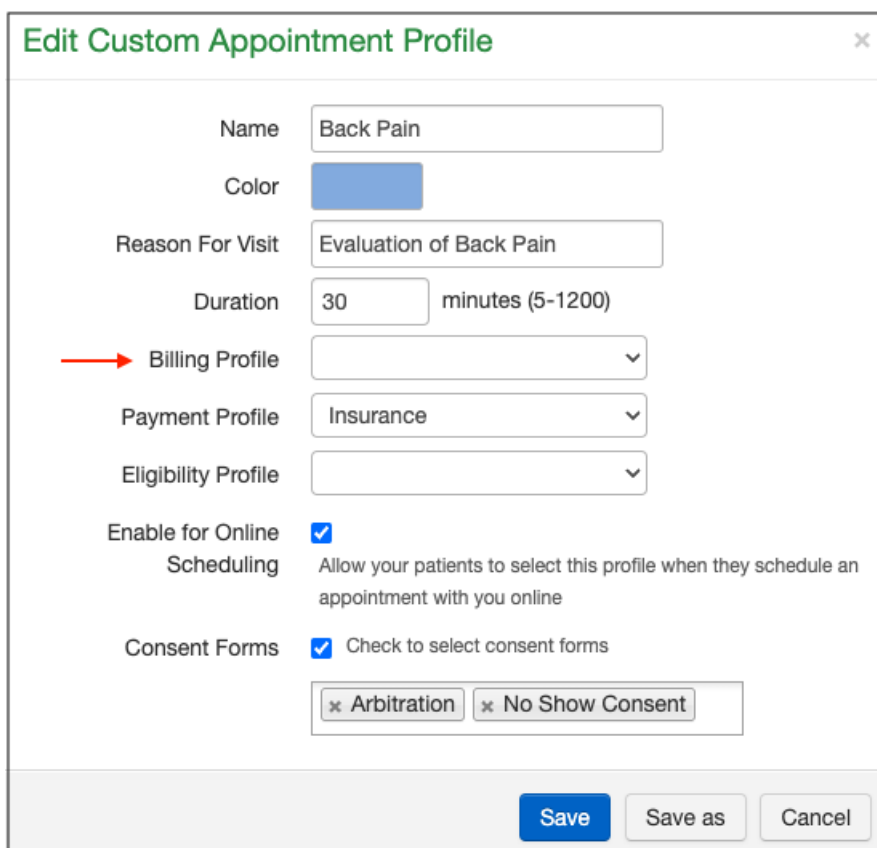
Once you have created both a billing profile and an appointment profile, you can connect them. When connected, any appointment scheduled using an appointment profile will also have the billing codes associated with the appointment populated.

1. Navigate to **Schedule > Appointment Profiles**.
2. Under the **Billing Profile** column header, the profile is connected to the Appointment Profile.
3. Click **Edit** to open the appointment info.




Name	Color	Duration	Reason For Visit	Billing Profile	Payment Profile	Eligibility Profile	Consent Forms	Updated	Created
Back Pain		30 minutes	Evaluation of Back Pain	Insurance			2		

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



### Edit Custom Appointment Profile

Name:

Color: 

Reason For Visit:

Duration:  minutes (5-1200)

**Billing Profile**:

Payment Profile:

Eligibility 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

5. Press **Save** when finished.

### Edit Custom Appointment Profile ✕

Name

Color

Reason For Visit

Duration  minutes (5-1200)

Billing Profile

Payment Profile

Eligibility 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

Arbitration  No Show Consent

6. Select the desired Appointment Profile from the **Profile** dropdown in the menu and **Save or Save & Close**. 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

Provider

Supervising

Patient

Reason:

Scheduled:  Time

Duration:  minutes  Allow overlapping

Notes:

Consent Forms:

Billing

Office:

Profile:

Eligibility Profile:

Exam:

Color:

Status:

> 24h

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.

Arrange a Follow-up Reminder

View Active Reminders:

