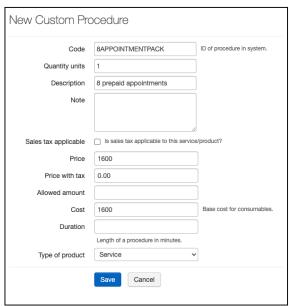
## How to Track Bulk Appointment Packages with Authorizations

Last modified on 05/20/2025 12:18 pm EDT

Appointment packages are used when patients buy a certain number of appointments to be used for a certain period. It is possible to track appointment packages purchased by patients in your DrChrono account.

- 1. Create a custom code for the package by navigating to Billing > Coding > New Custom Procedure.
- 2. Enter Quantity Units, Notes, Price, and Type of Product. You have the option to choose either Service or Product under Type of Product. As long as none of the parameters (# of visits, price) change, this custom procedure can be used with the entire patient population.



3. Navigate to the patient's chart > Demographics > Authorizations > + Add New Authorization



4. Create **an auth**orization number, end date, or number of visits. Press **Create** to add the authorization to a patient's account.



5. The authorization, number of visits approved (total), and the number remaining will show in the patient's appointment.



6. The number of visits remaining will appear in the patient's account as the visits are used.



7. The patient payment for the package, since it is collected prior to the services being rendered, will remain in unallocated payments until the service is complete. Review this article to see how to allocate the funds to each service.