

# How to Track Bulk Appointment Packages with Authorizations

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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.

New Custom Procedure

Code: 8APPOINTMENTPACK ID of procedure in system.

Quantity units: 1

Description: 8 prepaid appointments

Note:

Sales tax applicable:  Is sales tax applicable to this service/product?

Price: 1600

Price with tax: 0.00

Allowed amount:

Cost: 1600 Base cost for consumables.

Duration:

Length of a procedure in minutes.

Type of product: Service

Save Cancel

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

Important Demographics Insurances **Authorizations** Smoking Status Flags Balance DrChrono Payments

Insurance Authorizations [+ Add New Authorization](#)

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
123456	Active	00400	10/30/2024	10/31/2025		8.0	8.0	

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

### New Authorization ✕

Authorization number

Start date

End date   
(End date and/or number of visits must be provided)

Number of visits   
(End date and/or number of visits must be provided)

Specialty  (optional)

Notes

Pending  (optional: Pending authorization will not be applied to claim)

Procedure codes  (optional)

[Create](#)

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

Important	Demographics	Insurances	Authorizations	Smoking Status	Flags	Balance	DrChrono Payments	
Insurance Authorizations							<a href="#">+ Add New Authorization</a>	
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
123456	Active	00400	10/30/2024	10/31/2025		8.0	8.0	

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

Insurance Authorizations								<a href="#">+ Add New Authorization</a>
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
8APPOINTMENTPACK	Active	8APPOINTMENTPACK	11/15/2024			8.0	6.0	

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.