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.

Please note that only upper-case letters, a period, and/or numbers will be accepted for the code itself. It will not allow a space.

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 ~				

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

Demographics									
 ✓ Sufficient patient demographics to bill insurance. Demographics Insurances Authorizations Patient Flags Payments 									
								w Authorization	
Authorization #	Authorization # Status Procedure Codes S		Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes	

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

New Authorization	×
Authorization number Start date	
Number of visits	(End date and/or number of visits must be provided) (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.

Insurance Authorizatio	1	+ Add New	Authorization						
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes	
123456	Active		05/20/2025	06/30/2025		5.0	4.0		 ×
8APPOINTMENTPACK	Active		05/01/2025	06/30/2025		8.0	7.0		 ×

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

Insurance Authorizations										
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes		
123456	Active		05/20/2025	06/30/2025		5.0	4.0		 × 	
8APPOINTMENTPACK	Active		05/01/2025	06/30/2025		8.0	7.0		 × 	

7. To view the visits that have been counted towards an authorization, press the blue Authorization # on the left.

Insurance Authorizations												
Authoriz	ation #	Status	Procedure Codes		Start Date	End Date	Specialty	Visits Approved		Visits Remaining	Notes	
123456		Active NEW.CUSTOM.CODE			05/17/2025	12/31/2025		8.0		6.0		× ×
Date o	Date of Service				Provider Reason			Office			Status	
05/17/2025 10:05AM				Doctor Doctor					Primary Office			
06/02/2025 10:05AM			Doctor Doctor					Primary Office				

8. As an authorization nears expiration—either due to the approved number of visits being used or the end date approaching—a warning label will appear on the patient's account to alert you in advance.

Demographics

BILLING WARNING: Authorization #NO.VISIT.LIMIT expires in 14 days. BILLING WARNING: Authorization #123456 has 0 of 2 allowed visits scheduled.

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