

# 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	<input type="checkbox"/> 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	▼

SaveCancel

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

### Insurance Authorizations

+ Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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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

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

Insurance Authorizations									+ 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			

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