

How do I apply a discount on a patient's account?

Last modified on 03/19/2026 2:16 pm EDT

Applying a discount or adjusting part of your patient's invoice is easy with DrChrono!

1. Navigate to **Billing > Live Claims Feed**
2. Locate your patient's appointment by searching for it by name, claim ID, or date of service.

Live Claims Feed

Select All Offices | Select None | C new office All | Primary Office All | Test office All

Claim Type All | Claim St All | Billing St: All | Appt Profiles: All | Calculate Counts | What's this? | TFL Warning

Patient Payer Name Payer ID drc claim # From - To Clinical Note

Open window in new tab Exclude future follow-up dates Check All Clear Update Filter

3. Once you have found your patient's appointment, press the date of service (if applicable), so you are on the appointment screen.

| Info | Claim ID | Patient | Date of Service | Office | Provider | Supervising Provider | Billing Provider | Billed | Allowed | Adjmt | Ins 1 Paid | Ins 2 Paid | Pt Paid | Ins Bal | Pt Line Item Bal | Claim Bal | Exp Reimbr |
|--------------------------|-----------|--------------------|-------------------|--------|----------|----------------------|------------------|----------|------------|------------|------------|------------|---------|---------|------------------|------------|------------|
| | | | | | | | | Totals: | \$2,400.00 | \$2,400.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$2,400.00 | \$2,400.00 | \$0.00 |
| <input type="checkbox"/> | 342196985 | Jenny (Jen) Harris | 2/24/2025 04:20PM | | | | | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$150.00 | \$0.00 |

4. Scroll down to where the CPTs and payments are listed and press the blue plus sign on the right. It is the **Add Transaction** button.

| Code/Check Date | Description | Mods/Posted Date | Service Date | EPSTD | Qty/Min | Dx Pointers | Price | Billed | Allowed | Adjmt | Ins 1 paid | Ins 2 paid | Pt Paid | Ins Bal | Pt Bal | Status/Adj Type |
|--------------------------|-------------|------------------|--------------|-------------------------------------|---------|-------------|--------|----------|----------|----------|------------|------------|---------|---------|----------|-----------------|
| | | | | | | | | Totals: | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |
| <input type="checkbox"/> | 99203 | | | <input checked="" type="checkbox"/> | 1.00 | 1 0 0 0 | 150.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |

+ Add Line Item | Delete Selected | Validate Claim | Reparse ERA | Claim Info | Verify & Save

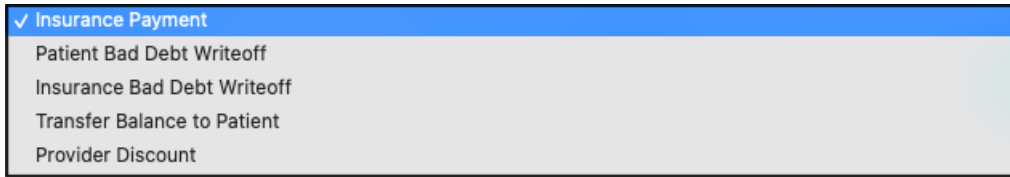
5. Once pressed, an additional line will open. It will be listed under any insurance/ERA payments posted.

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|-------------------------------------|-------------|------------------|--------------|-------------------------------------|---------|-------------|--------|----------|----------|----------|------------|------------|---------|---------|----------|-----------------|
| | | | | | | | | Totals: | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |
| <input type="checkbox"/> | 99203 | | | <input checked="" type="checkbox"/> | 1.00 | 1 0 0 0 | 150.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |
| <input checked="" type="checkbox"/> | | | 02/24/2025 | | | | | | | | | | | | | Insurance Payme |

+ Add Line Item | Delete Selected | Validate Claim | Reparse ERA | Claim Info | Verify & Save

6. On this new line, you can update as needed to apply a patient discount.
 - a. **Posted Date** - this will automatically default to the day you are entering the discount.
 - b. **Check Number** - you can leave this blank since it does not apply
 - c. **Drop Down** - you can use the drop-down to specify what type of transaction this is.

7. To adjust a patient balance, you would want to select either **Patient Bad Debt Writeoff** or **Provider Discount**.



Insurance Payment

- Patient Bad Debt Writeoff
- Insurance Bad Debt Writeoff
- Transfer Balance to Patient
- Provider Discount

- a. **Adjustment box** (red) - this is where you type the dollar amount you would like to adjust. No negative signs are needed; just the whole dollar amount. (Examples - 25.00 or 5.00)



Provider Discount 0 0 [0] N/A 0: Settled -----

- b. **Payer box** (blue box above) - this will default to the patient's insurance. If you are adjusting a patient balance, you should select N/A.

8. Once the discount has been entered, press **Verify and Save**, and the system will adjust the amount you have requested.



Verify & Save

9. You can then update the appointment status to reflect the change (for example, change to Paid in Full) if the adjustment you made clears the entire balance.

You can further automate this process by setting up an edit to automatically adjust the balance when a claim's billing status is changed to Settled. Details on how to set this edit can be found [here](#).

Demo