

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

Last modified on 02/24/2025 2:45 pm EST

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

Here are the steps to accomplish this task:

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	\$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	\$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.

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	\$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	02/24/2025													

+ 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**.

A screenshot of a dropdown menu. The top item, 'Insurance Payment', is highlighted in blue and has a checkmark to its left. Below it are four other options: 'Patient Bad Debt Writeoff', 'Insurance Bad Debt Writeoff', 'Transfer Balance to Patient', and '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)

A screenshot of a form field. On the left, there is a dropdown menu labeled 'Provider Discount'. To its right is a text input field containing the number '0', which is enclosed in a red rectangular box. Further right is another dropdown menu showing '[0] N/A', which is enclosed in a blue rectangular box. To the right of this are two more dropdown menus: one labeled '0: Settled' and another with a dashed line '-----'.

- 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.

A screenshot of a blue rectangular button with a white checkmark icon on the left and the text 'Verify & Save' in white.

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](#).