

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

Last modified on 09/18/2024 2:27 pm EDT

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. Pull up your patient's appointment by searching for it by name, claim ID, or date of service.

Live Claims Feed

Select All Offices Select None A nursing home **All** B Assisted Living **All** C new office **All** D Inpatient Hospital **All** D Inpatient Hospital **All**

Discharge Summary **All** patient statement remit address **All** Primary Office **All** Primary Office **All** Telehealth **All**

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

Patient Payer Name Payer ID drc claim # 01/01/2021 - 02/01/2021 Clinical Note

Open window in new tab Check All Clear Update Filter

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

Info	Claim ID	Patient	Date of Service	Office	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal
Totals:						\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00
<input type="checkbox"/>	158141998	Jenny (Jen) Harris	10/05/2020 09:00AM	Primary Office	Kermit Frog	\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00
Totals:						\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00

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

Code/Check Date	Description	Mods/Posted Date	Service Date	EPSDT	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
Totals:								\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00	Bill Insurance	
<input type="checkbox"/>	99214				1.00	1 0 0 0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$35.00	Balance Due	\$	<input type="checkbox"/>
<input type="checkbox"/>	10/28/2020	10/28/2020	Check # 12345					45: Charge excee	40.00	0	[1] Aetna	1: Processed	CO: Contr	ADJ INSURER			<input type="checkbox"/>
<input type="checkbox"/>	10/28/2020	10/28/2020	Check # 12345					Insurance Payme	0	100.00	[1] Aetna	1: Processed	CO: Contr				<input type="checkbox"/>
<input type="checkbox"/>	10/28/2020	10/28/2020	Check # 12345					2: Coinsurance Ai	15.00	0	[1] Aetna	1: Processed	PR: Patier	PATIENT RESP			<input type="checkbox"/>
<input type="checkbox"/>	10/28/2020	10/28/2020	Check # 12345					3: Co-payment Ai	20.00	0	[1] Aetna	1: Processed	PR: Patier	SKIP SECONDARY			<input type="checkbox"/>

+ Add Line Item Delete Selected Reparse ERA Claim Info EDI 837p Verify & Save

5. Once clicked, you should see an additional line open. It will be listed under any insurance/ERA payments posted.

Code/Check Date	Description	Mods/Posted Date	Service Date	EPSDT	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals:							\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00	Balance Due	
99214					1.00	1 0 0 0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	
10/28/2020	10/28/2020	Check # 12345						45: Charge excee		40.00	0	[1] Aetna	1: Processed	CO: Contr	ADJ INSURER	
10/28/2020	10/28/2020	Check # 12345						Insurance Payme		0	100.00	[1] Aetna	1: Processed	CO: Contr		
10/28/2020	10/28/2020	Check # 12345						2: Coinsurance Ar		15.00	0	[1] Aetna	1: Processed	PR: Patier	PATIENT RESP	
10/28/2020	10/28/2020	Check # 12345						3: Co-payment Ar		20.00	0	[1] Aetna	1: Processed	PR: Patier	SKIP SECONDARY	
02/01/2021	02/01/2021	Check #						Insurance Payme		0	0	[1] Aetna	0: Settled			

On this new line, you can update as needed to apply a patient discount.

- **Posted Date** - this will automatically default to the day you are entering the discount.
- **Check Number** - you can leave this blank since it does not apply
- **Drop Down** - you can use the drop-down to specify what type of transaction this is.
 - 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

- **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 ▼ ----- ▼

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

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



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](#).
