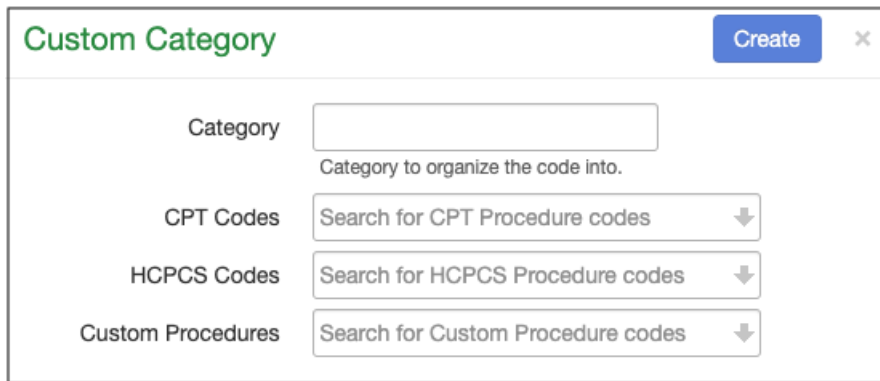


# Procedure Categories

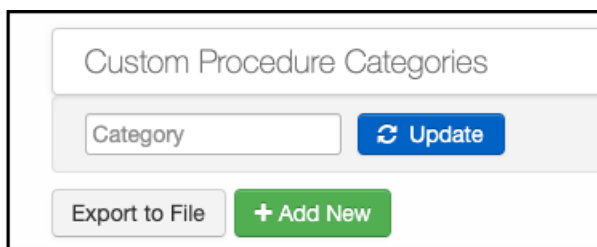
Last modified on 12/10/2024 3:00 pm EST

Depending on your business model, reviewing your billed CPT, HCPCS, and/or custom codes by categories may be helpful. InDrChrono, you can create categories and group billed codes accordingly.

1. Navigate to **Account > Custom Fields**.
2. Select Custom Procedures from the menu on the left.
3. Press the green **+ Add New** to create a procedure category.
4. Complete the fields with your chosen Category names, along with the CPT, HCPCS, and/or Custom Procedure codes you would like to group under the category.



5. When complete, press **Create**.
6. To view a report with your created categories, press **Export to File**. The report will be generated and available in your message center.



7. From there, you can create a pivot chart in MS Excel to see Charges, Insurance payments, Patient Payments, and Adjustment amounts by category.

|              | Charges     | Ins payment | Patient Paym | Adjustment |
|--------------|-------------|-------------|--------------|------------|
| Office Visit | \$ 788.67   | \$ 67.87    | \$ 67.76     | \$ 56.34   |
| Lab Codes    | \$ 888.67   | \$ 167.87   | \$ 167.76    | \$ 156.34  |
| Radiology    | \$ 988.67   | \$ 267.87   | \$ 267.76    | \$ 256.34  |
| Surgery      | \$ 1,088.67 | \$ 367.87   | \$ 367.76    | \$ 356.34  |

8. You can also utilize the Financial Transactions Report (**Billing > Financial Transactions Report (Day Sheet)**) to see financial information related to Custom Procedure Categories.

The screenshot displays the 'Financial Transaction Report' interface. At the top, there is a title 'Financial Transaction Report' and a navigation bar with tabs: 'Summary' (selected), 'Debits', 'Credits', 'Adjustments', 'Patient Payments', and 'All Data'. Below the tabs is a 'Controls' section containing several filters: a 'Date' text input field, a 'Provider' dropdown menu set to 'All', an 'Office' dropdown menu set to 'All', a 'Payment Profile' dropdown menu set to 'All', and a 'Code Category' dropdown menu set to 'All'. A red arrow points to the 'Code Category' dropdown menu. There are also refresh, back, and forward icons at the top left of the report area.