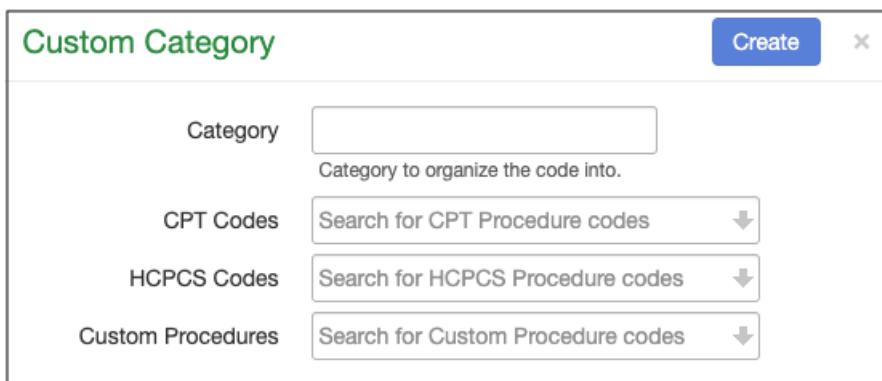


Procedure Categories

Last modified on 01/16/2026 3:00 pm EST

Depending on your business model, reviewing your billed CPT, HCPCS, and/or custom codes by categories may be helpful. In DrChrono, 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.



Custom Category

Create

Category

Category to organize the code into.

CPT Codes

Search for CPT Procedure codes

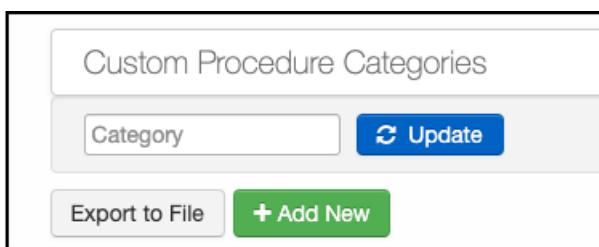
HCPCS Codes

Search for HCPCS Procedure codes

Custom Procedures

Search for Custom Procedure codes

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.



Custom Procedure Categories

Category

Update

Export to File

+ Add New

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.

Financial Transaction Report

Controls

Summary [Debits](#) [Credits](#) [Adjustments](#) [Patient Payments](#) [All Data](#)

Date

Provider **Office**

Payment Profile **Code Category** 

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