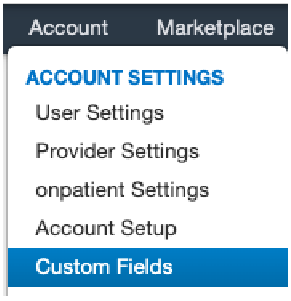
Creating and Archiving Custom Billing Statuses

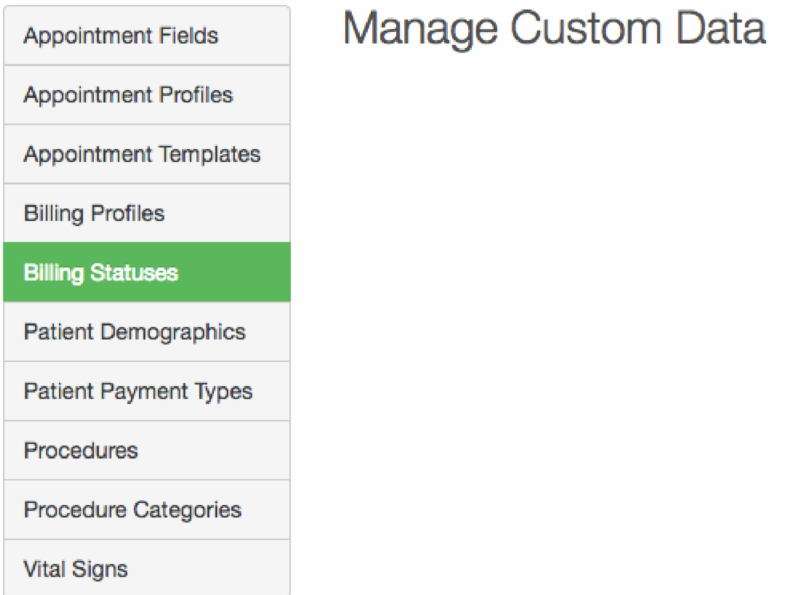
07/24/2024 1:30 pm EDT

Custom billing statuses are a great way to customize your practice's billing. If your practice has a specific workflow for billing, you can make custom billing statuses to keep track of each step in the process.

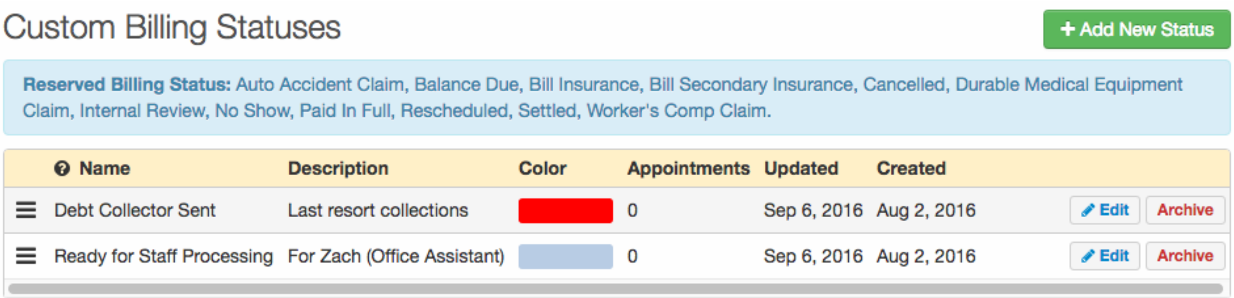
To get started, hover over **Account** on your navigation bar and select **Custom Fields**.



Select **Billing Statuses** on the left-hand navigation bar.

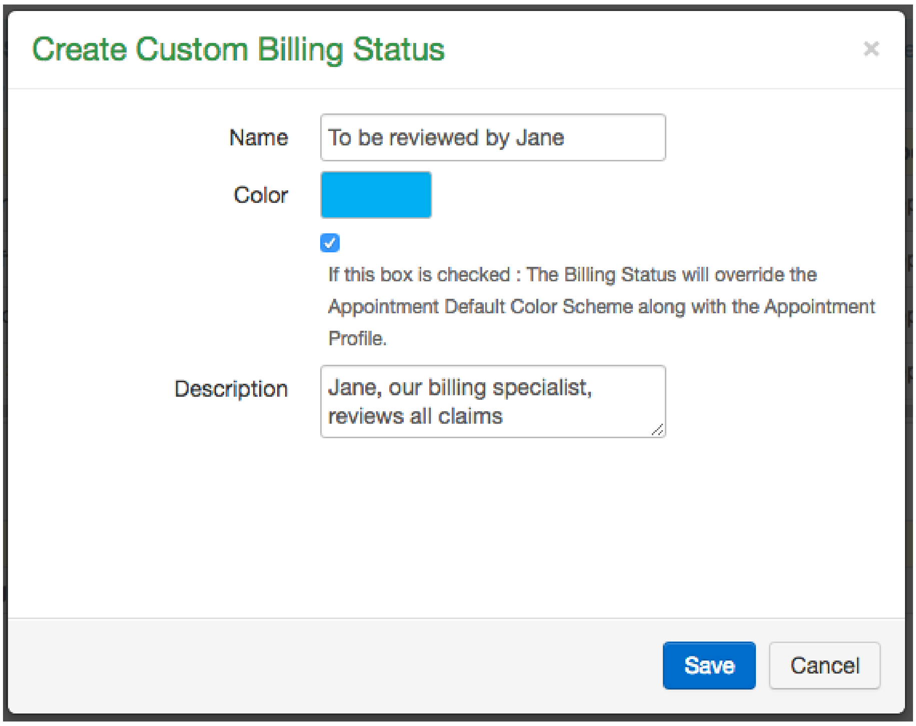


On the Custom Billing Statuses page, you'll be able to view all your custom billing statuses.



To add a new billing status, select the green **+Add New Status** button.

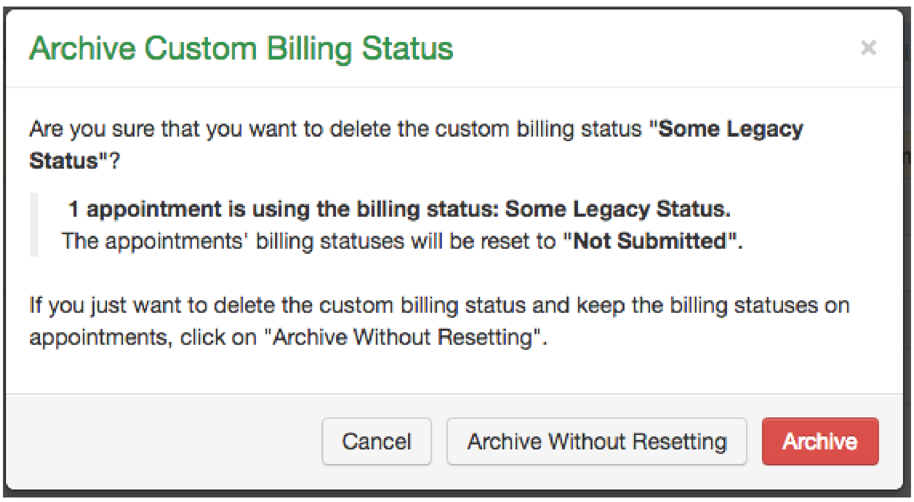
Fill out the name, color, and description of the new billing status and select the blue**Save** button when complete. Your billing status will now appear on the Custom Billing Statuses page.



Archiving a Custom Billing Status

To remove a billing status, you may select the**Archive** button to the right of the billing status you would like to remove.

When you archive a billing status, the DrChrono EHR will check if the billing status is being used by any appointments. If the billing status is being used, the following warning will appear. You will have the option to archive the status with or without resetting appointments to **Not Submitted**. You may unarchive any archived statuses by selecting the **Unarchive** button on your list of archived statuses.



Prefer to watch a video on this topic? You can do so here.