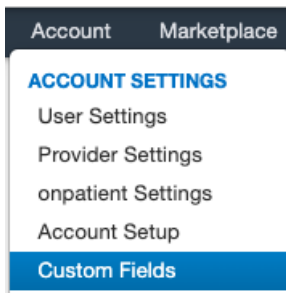


Creating and Archiving Custom Billing Statuses

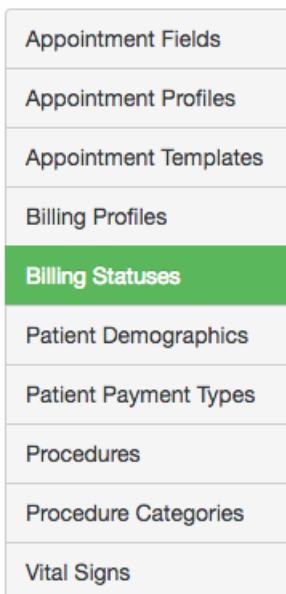
07/24/2024 1:30 pm EDT

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.



Manage Custom Data

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

Custom Billing Statuses

[+ Add New Status](#)

Reserved Billing Status: Auto Accident Claim, Balance Due, Bill Insurance, Bill Secondary Insurance, Cancelled, Durable Medical Equipment Claim, Internal Review, No Show, Paid In Full, Rescheduled, Settled, Worker's Comp Claim.

Name	Description	Color	Appointments	Updated	Created	
Debt Collector Sent	Last resort collections	 	0	Sep 6, 2016	Aug 2, 2016	Edit Archive
Ready for Staff Processing	For Zach (Office Assistant)	 	0	Sep 6, 2016	Aug 2, 2016	Edit Archive

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

+ Add New Status

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.

Create Custom Billing Status

Name

Color

If this box is checked : The Billing Status will override the Appointment Default Color Scheme along with the Appointment Profile.

Description

Save Cancel

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.

Some Legacy Status 1 Sep 6, 2016 Sep 6, 2016 [Edit](#) [Archive](#)

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.

Archive Custom Billing Status

Are you sure that you want to delete the custom billing status "**Some Legacy Status**"?

1 appointment is using the billing status: Some Legacy Status.
The appointments' billing statuses will be reset to "**Not Submitted**".

If you just want to delete the custom billing status and keep the billing statuses on appointments, click on "Archive Without Resetting".

Cancel Archive Without Resetting **Archive**

Prefer to watch a video on this topic? You can do so [here](#).
