

# VIDEO: Applying Billing Profiles

07/24/2024 10:16 pm EDT

There are several places in DrChrono where you can apply Billing Profiles to make it easier to populate billing information and reduce time spent.

They include:

- The appointment window
- The clinical note,
- The live claims feed,
- A switch in the form builder.

For information on creating Billing Profiles, click [here](#).

## Billing Profiles in the Appointment Window

1. Go to the schedule and open an appointment window and go to the **Billing** tab.
2. Select the profile you would like to use from the **Billing Profile** dropdown menu.

**Schedule Appointment**

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status ICD Version ICD-10 Patient Payment \$ 0 Copay: \$20 Pre Authorization Approval Referral # Payment Profile Cash

**Billing Profile** (dropdown menu open):  
Copy Last Billing  
6 Adjustments  
Back Pain  
Dolphin Attack  
Flu Treatment  
Glasses  
Glaucoma  
HFMD  
PT  
Physical Exam  
Post Op  
Sea Attack  
Sea Creature Attack  
Sea Lion Attack  
Spider Bite  
**Strep**  
Surgery  
Turkey  
Turtle  
Weight loss

HCFA Box 10 - Is patient's condition related to:  
Employment No  
Auto Accident No  
Other Accident No  
Onset Date Type Onset of Current Symptoms  
Onset Date  
Other Date Type - Other Date Type -  
Other Date

Claim Billed: \$0.00 Adjusted Patient Paid: \$0.00

ICD-10 Codes ICD-9 Codes to Convert NDC Codes Custom Codes

CPT Codes HCPCS Codes

3. Once the profile is selected, click **Save & Close** or **Save**.

Billing Profile: **Strep** +

Onset Date:

Billing Pick List: Choose Codes from Pick List

Other Date Type: - Other Date Type -

Diagnosis Pick List: Choose Codes from Pt Problems

Other Date:

Credit Card Payment: **Process Credit Card**

Claim Billed: \$0.00   Adjustment: \$0.00   Insurer Paid: \$0.00   Patient Paid: \$0.00

ICD-10 Codes

#	Code	Description
1	J03.00	Acute streptococcal tonsillitis, unspecified

CPT Codes

Code	Description	Price (\$)
1 3210F	GRP A STREP TEST PERFORMED	75

ICD-9 Codes to Convert

#	Code	Description
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Allowed: \$50.00

Modifiers: --- --- --- ---

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0:0

NDC Codes

NDC Code	Quantity	Units	Line Item
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2 99213 OFFICE/OUTPATIENT VISIT EST 175

Modifiers: --- --- --- ---

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0:0

Custom Codes

Code	Description	Price (\$)
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HCPSC Codes

Code	Description	Price (\$)
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Include note in EDI Billing:

**Delete** **Save & Close** **Save** Cancel

### Billing Profiles in the Clinical Note

1. Open a clinical note and go to the **Billing** tab under

2. Click **OK** to apply the profile to the visit.

### Billing Profiles in the Live Claims Feed

1. Go to **Billing > Live Claims Feed**.

**BILLING**

Billing Summary

**Live Claims Feed**

Patient Payments (

Day Sheet

2. Click on the **Date of Service** for the appointment to open the billing details screen.

Live Claims Feed

Select All Offices | Select None | Primary Office All | Telehealth All | Test Office All

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

Patient: | Payer Name: | Payer ID: | drc claim #: | 07/31/2020 - 08/31/2020 | Clinical Note: |

Open window in new tab  | Check All | Clear | Update Filter

Batch Status Change | Export to File | Custom Export | Display | Schedule | PAGE 1

Info	Claim ID	Patient	Date of Service	Office	Supervising Provider	Billing Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins Stat
Totals:							\$1,410.00	\$1,410.00	\$0.00	\$0.00	\$0.00	\$2.00	\$85.00	\$1,323.00	\$1,408.00	\$100.00		
<input type="checkbox"/>	153498388	Jenny (Jen) Harris	8/31/2020 12:50PM	Primary Office			\$250.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	\$250.00	\$50.00	Cigna	Sub

3. Select the profile to be applied from the **Billing Profile** menu.

Jenny (Jen) Harris – 08/31/2020  
Primary Office [11] – Exam 1

View Service | + EOB | SuperBill

- Billing Status
- ICD Version: ICD-10
- Billing Provider: - If different to provider -
- Pt Payment
- Payment Profile
- Pt Payment Due
- Billing Profile**
  - Select Profile
  - Copy Last Billing Respecting Provider
  - Physical Exam
  - Back Pain
  - Strep**
  - 6 Adjustments
  - Dolphin Attack
  - Flu Treatment
  - Glasses
  - Glaucoma
  - HFMD
  - Post Op
  - PT
  - Sea Attack
  - Sea Creature Attack
  - Sea Lion Attack
  - Spider Bite
  - Surgery
  - Turkey
  - Turtle
  - Weight loss
- Billing Pick List
- Diagnosis Pick List
- Payer pre-auth #
- Do Not Transmit
- Referral #
- Billing Facility
- Purchased Serv Provider
- Appointment Notes
- Follow-up Date
- Billing Notes

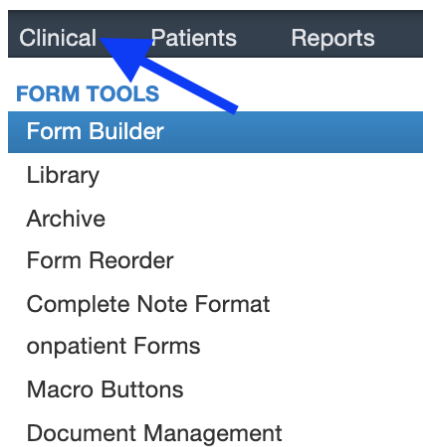
4. Click **Verify & Save**.

Billing Profile: 
  
 Billing Pick List: 
  
 Diagnosis Pick List: 
  
 Payer pre-auth #: 
  
 Do Not Transmit:  Do not transmit authorization number to payer

#	ICD-10	Description	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj
1	J03.00	Acute streptococcal tonsillitis, unspecified	75 / \$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Not
<b>Totals:</b> Billed: \$0.00, Allowed: \$0.00, Adjmt: \$0.00, Ins 1 paid: \$0.00, Ins 2 paid: \$0.00, Pt Paid: \$0.00, Ins Bal: \$0.00, Pt Bal: \$0.00												

## Billing Profiles in the Form Builder

1. Go to **Clinical > Form Builder**.



2. Select the form you would like to add the profile to and add a **Switch**.

Form Builder

Legend:

**Form List**
  
 Presets Additional
   
 Billing Profile Sample
   
 Surgery: Pre-Op Note
   
 Trigger Point Injection Form
   
 Lumbar Facet Joint Injections
   
 CERVICAL SPINE ASSESSMENT
   
 Consent Practice Demo
   
 Consent Free Draw 2
   
 Physical Exam Multiple Select
   
 Trigger Point Injection Form
   
 Share

**Billing Profile Sample \***
  
 New Switch
   
 ON

**Form Tools**
  
 New Fields Field Clipboard 1
   
 New Section SOAP Section
   
 Short Text Field
   
 Yes / No
   
**Switch**
  
 Single Select
   
 Multiple Select
   
 Free Draw
   
 Fraction Field
   
 Header
   
 Subheader

3. Enter a name for the switch in the **Label Name** field.

Go to the **Billing Profile** menu and select the profile.

Click **Update Field**.

### Edit Field ✕

Label Name  try to keep it short!

Wide field  Required field

Spacing within note  New Line  New Paragraph  Smart Field

Default value  OFF

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#### Generated text

**Edit** **Preview**

Value  Patient  Date  Date & Time  Field Date  Field Date & Time

Header Subheader Bold Italic Underline  $x_2$   $x^2$

Pt Demogr ▾ Service ▾ Date & Time ▾ System Vitals ▾ Custom Vitals ▾ Custom Pt Demogr ▾

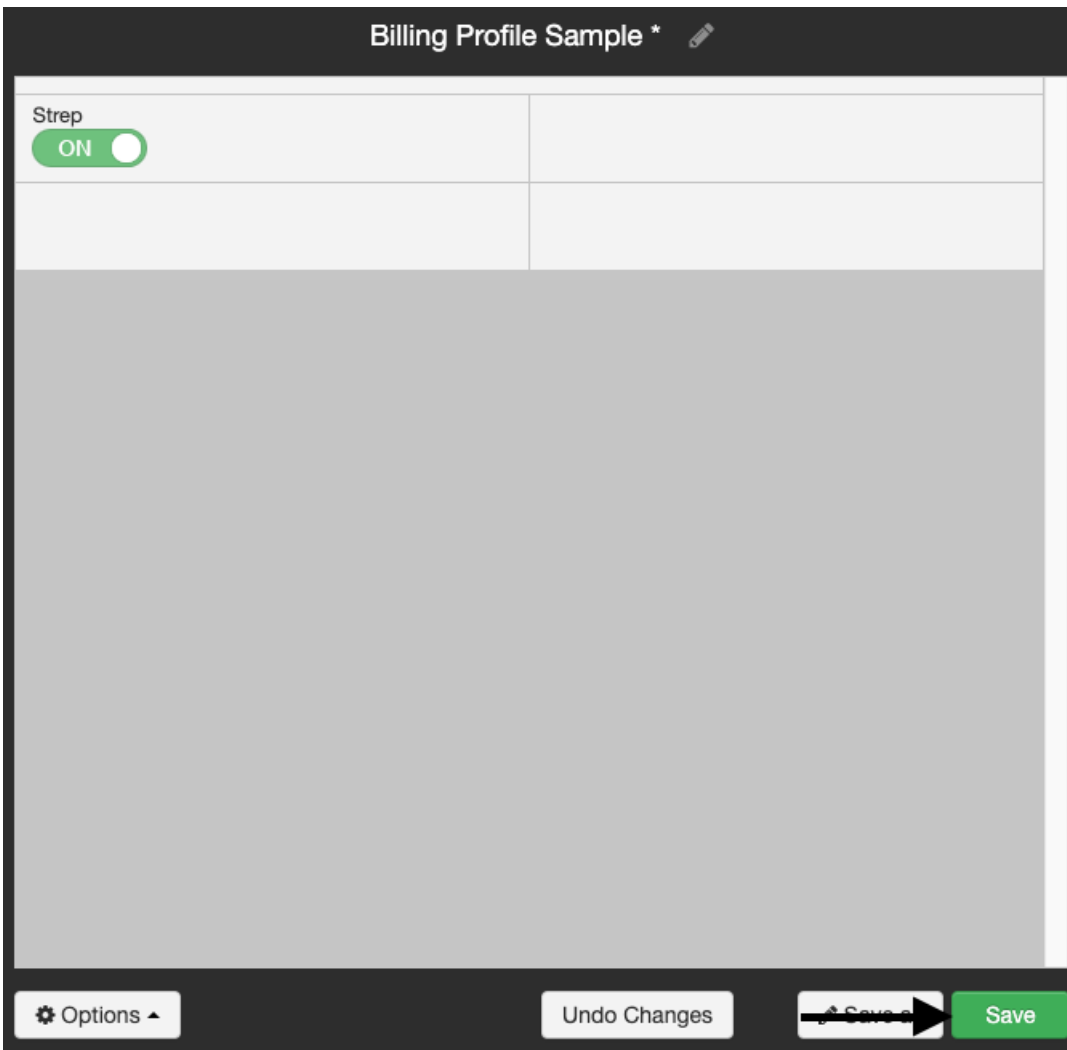
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Billing Profile	(None) ▾
Clinical codes	<input type="text" value="strep"/>

Code	Description

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4. Click **Save** to save the changes to your form.



5. In the clinical note, activate the switch to apply the **Billing Profile**.

