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 Appointm	ent											
Appointment	lling	Eligibility	Vitals		Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper		
							Patient SuperBill	▼ Clinical	Note Billing D	etails Other	Forms	
Ø Billing \$	Status				~	HCFA Box	10 - Is patient's c	ondition rela	ted to:			
ICD V	ersion	ICD-10			~	Employment No ~						
Patient Pag	yment	nt \$ 0 Copay: \$20 +			F		Auto Accident	No	~			
Pre Authorization Ap	proval	val					Other Accident	No	~			
Referral #						(e Onset of Current Symptoms o V					
Payment Profile Cash					~		Onset Date Type	Onset of Cu	rrent Symptom	s o 🗸		
Billing B	Profile ~	/ Copy Last B	illina				Onset Date Other Date Type	- Other Date	Tupo	~		
Billing Pick List		6 Adjustmer		_ist								
Diagnosis Pick List		Back Pain Dolphin Atta	ack	oblems	3		Other Date					
Credit Card Pay	yment	Flu Treatme										
		Glasses Glaucoma										
Claim Billed: \$0.00 Ad	djustn	HFMD PT		0.00	Patient Paid:	0.00						
CD-10 Codes		Physical Exam		code	s 🔸	CPT	Codes		Find CPT Pr	ocedure codes	e codes	
Code		Post Op Sea Attack				Code	Descrip	otion	P	Price (\$)		
CD-9 Codes to C	Conve	Sea Creatur Sea Lion Att		code	s 📲	HOR	CS Codes			S Procedure co	daa	
		Spider Bite		code	5						des	
Code	_	Strep Surgery				Code	Descrip	otion	P	Price (\$)		
NDC Codes		Turkey										
NDC Codes		Turtle		ÐS	+							
DC Code	Quant	Weight loss		ne Ite	m							
Custom Codes		Fin	d Custom	Proced	ure codes 🖶							
	ription			ice (\$)								

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

Billi Diagno:	illing Profile ng Pick List sis Pick List rd Payment	Choose (Codes from Pic Codes from Pt Credit Card				0	Onset Date ther Date Type Other Date	- Other Date 1	Type - V	
Claim Billed: \$0.00		nt: \$0.00	Insurer Pai		Patient Paid	: \$0.0					
ICD-10 Code	s		Find Diagno	sis codes	+		CPT C	odes		Find CPT Procedure code	es 🔸
	scription						Code	Description		Price (\$)	
1 J03.00 Ac	ute streptococ	cal tonsilli	tis, unspecifie	d	×		1 3210F	GRP A STREP	TEST PERFORM	MED 75	×
ICD-9 Codes	to Conver	t	Find Diagno	sis codes	+			Allow		v v	
# Code	I	Descriptio	on					Quantity/Minut	es: 1.00		
NDC Codes			Find NDC C	odes	+			Diagnosis Pointe			
NDC Code	Quantity	,	Units	Line Iter	n		2 99213	OFFICE/OUTP	ATIENT VISIT ES	ST 175	x
Custom Code	es		Find Custon	n Procedi	ire codes 🖊			Modifie Quantity/Minut		• •	
Code	Description		P	rice (\$)				Diagnosis Pointe			
								S Codes Descrip		Find HCPCS Procedure of Price (\$)	odes 🖊
Include note in E	EDI Billing:	Custom	NTE EDI Billi	ing Note (a.k.a. HCFA/	CMS-	-1500 Line	19)			
				Dele	te Save &	Close	Save	Cancel			

Billing Profiles in the Clinical Note

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

		Jenny (Jen) H	larris (Female	40 years	02/11/1	1980 HAJE00000	01)	Brendan Wilbert	on 08/31/2020
H&P SOAP ADDITIONAL APPS	25	Physical Exam							
Preview Note									
onpatient / Check-In									
Subjective									.0
Objective		Billin g Statue	 Billing Profiles 	Billing Pi	cklist	Growthcharts	♥ Vitals	Print section	Fax section
Assessment			Copy Last Billing						
	ICD-9 Codes	Find	6 Adjustments	÷	CP	T Codes		Find CPT Procedu	ure codes 🛛 🖊
Plan	# Code	Description	Back Pain		Code	Desc	ription	1	Price
Medications & Allergies			Dolphin Attack						
Billing	ICD-10 Codes	Find I	Flu Treatment		HC	PCS Codes		Find HCPCS Proc	edure codes 🔸
	# Code	Description	Glasses Glaucoma		Code	Desc	ription		Price
			HFMD						
	NDC Codes	Find N	PT	+					
	NDC Code	Quantity Units	Physical Exam						
			Post Op						
	Custom Codes	Find (Sea Attack Sea Creature Attac	к –					
	Code	Description	Sea Lion Attack						
			Spider Bite						
			Strep						

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

Billing Profiles in the Live Claims Feed

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



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

LIVE	Claims F	eed																
Selee	ct All Offices	Select N	None	rimary Of	fice All -	Telehea	ith All 🔻	Test Of	fice All	•								
Clain	n St 🕒 🗗	O O All •	Billi	ng St: All	Appt F	Profiles: A	II - Ci	alculate Co	ounts	() Wł	nat's th	nis? T	FL War	ning 🗌				
Patien	t	E Pa	ayer Name		Payer ID	d	lrc claim #	07/	31/202	0.	- 08	/31/202	20	Clinical Not	te		~	
Oper	n window in r	new tab 🔽													Check A	ll Cle	ar Upda	te Filter
					🖺 Custom	Export	Display [•]	- + So	chedule	2								
Batch	Status Char	nge 🔻 🔒	Export to F	ile 🔻	Custom	Export	Biopiay			_								PAGE
	Status Char Claim ID	nge 🗕 🔒 Patient	Export to F	Office		·	Billed	Allowed	Adjmt		Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	ins 1	PAGE Ir S
			Date of		Supervising	Billing Provider			-	Paid		Paid	Bal		Bal	Reimbr	ins 1	l

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



4. Click Verify & Save.

Ρυ	Billing Profile Billing Pick List Diagnosis Pick List Payer pre-sult # Do Not Transmit Referral # Billing Facility urchased Serv Provider Appointment Notes Follow-up Date Billing Notes	Choose from I Choose from I Choose from I Do not transm		r						Employm Auto Accid Dther Accid DI Billing N Provid	Is patient No ent No ent No ote (H4	CFA/CMS-15 E. Jenner	00 Line 19)							
Patie	ent does not have unall	located payment	Appt. does not have unalloc	cated payment	Primary Insu	rer: () Cigna	P cypress													
		Description							Line Item			NDC C	ode			Quantit	y	Units		
	Add ICD-10 collin							=		~				+						
												Add N	DC code	*			1	UN (I	Jnit) 🗸	+
1	J03.00	Acute streptococc	al tonsillitis, unspecified					×		•		Add N	JC code	*			1	UN (Jnit) 🗸	+
1	J03.00		al tonsillitis, unspecified					×		•		Add N	JC code	*			1	UN (Jnit) 🗸	+
1			al tonsillitis, unspecified					×		•		Add N	JC code	•			1	UN (Jnit) 🗸	+
	ICD-9 to Convert	Description	al tonsillitis, unspecified					×		•		Add N	JC code	*			1		Jnit) 🗸	+
# No H	ICD-9 to Convert Add ICD-9 code	Description		0 city 0		50007	01.01	×			1									+
# No H	ICD-9 to Convert Add ICD-9 code	Description	al tonsilitis, unspecified Mods/Posted Date	Service Da	nte 😧	EPSDT	Qty/Min	× Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid			Pt Bal	Status/Adj		
# No H	ICD-9 to Convert Add ICD-9 code CD-9 codes found for th Code/Check Date	Description						X Dx Pointers Totals	Price	Billed \$0.00	\$0.00	Adjmt \$0.00	Ins 1 paid \$0.00	Ins 2 paid \$0.00	\$0.00	\$0.00	Pt Bal \$0.00			+
# No H	ICD-9 to Convert Add ICD-9 code CD-9 codes found for th Code/Check Date	Description		From date	To date	0	1.00	X Dx Pointers Totals	Price : 75 /\$50.00	Billed \$0.00 \$0.00	\$0.00 \$0.00	Adjmt \$0.00 \$0.00	Ins 1 paid \$0.00 \$0.00	Ins 2 paid \$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	Pt Bal \$0.00 \$0.00	Status/Adj		
# No H	ICD-9 to Convert Add ICD-9 code CD-9 codes found for th Code/Check Date	Description						X Dx Pointers Totals	Price	Billed \$0.00	\$0.00	Adjmt \$0.00	Ins 1 paid \$0.00	Ins 2 paid \$0.00	\$0.00	\$0.00	Pt Bal \$0.00	Status/Adj	\$	+

Billing Profiles in the Form Builder

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

Clinical	Patients	Reports							
FORM TOO	FORM TOOLS								
Form Builder									
Library									
Archive									
Form Rec	order								
Complete	Note Forma	at							
onpatient	Forms								
Macro Bu	ittons								
Document Management									

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

Form Builder				Legend:	🖋 Edit 🖣	Move 🚿 Copy to clipboa	ard X Archive
Form List	+		Billing Profile Sample *	() ²		Form Tools	
Presets Additional	New Sw					New Fields Field Clipt	oard 1
Billing Profile Sample	×	D			- 1	New Section SO	AP Section
Surgery: Pre-Op Note	×						
Trigger Point Injection Form	×					Short Text Field	
Lumbar Facet Joint Injections	×					Yes / No	YN
CERVICAL SPINE ASSESSMENT	×				11	Switch	ON
Consent Practice Demo	×				н.	Single Select	V
Consent Free Draw 2	×				н.	Multiple Select	
Physical Exam Multiple Select	×				н.	Free Draw	Mm
Trigger Point Injection Form	×					Fraction Field	
Fue advance Due advan				_		Header	
Share	🗘 Opti	ons 🔺	Undo Changes	Save as Sa	ve	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 N	lame	Strep				1	гу то кеер	It short!		
		Wide field	🗆 Requ	ired fie	eld					
Spacing within	note 🗌	New Line	New F	Paragra	aph 🗆 S	mart F	ield			
Default	value	OFF								
	Gener	ated text								
Edit	Value	e 🌢 Patient	🛗 Date	0 D	ate & Time	🛗 Fi	eld Date	O Field Date & Tim	e	
Preview	Header	Subheader	Bold	Italic	Underline	X2	X ²			
	Pt Dem	ogr • Servi	ce 🕶 🛛 🕻	Date &	Time 🔹	System	Vitals 🔻	Custom Vitals -	Custom P	Pt Demogr ▼
Billing P	rofile	(None) -								
Clinical c	odes	strep			Cod	е	De	scription		
		заер								+ Add New 🔺
		(None) Strep								
							_	8	Canoo	✓ Update field

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

	Billing Profile	e Sample * 🕜		
Strep ON				
Options •		Undo Changes	- Carro a	Save

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

H&P SOAP ADDITIONAL APPS	
Preview Note	Jenny (Jen) Harr
Billing Profile Sample	Physical Exam
Surgery: Pre-Op Note	
Trigger Point Injection Form	
Lumbar Facet Joint Injections	
CERVICAL SPINE ASSESSMENT	
Consent Practice Demo	Yes Include in Note
Consent Free Draw 2	
Physical Exam Multiple Select	Strep
Trigger Point Injection Form	