

Connecting Billing and Appointment Profiles

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Once you have created both a billing profile and an appointment profile, you can connect them. When connected, any appointment scheduled using an appointment profile, will also have the billing codes associated with the appointment populated.

- Navigate to **Schedule > Appointment Profiles**.

The screenshot shows a navigation menu with three main sections: 'Schedule', 'Clinical', and 'P'. Under 'Schedule', there are links for 'SCHEDULING TOOLS', 'Calendar', 'Availability Search', 'Appointments Dashboard', and 'Dashboard'. The 'Appointment Profiles' link is highlighted in a blue bar.

- Under the **Billing Profile** column header, you can see the profile connected to the Appointment Profile. Click **Edit** to open the appointment info.

Custom Appointment Profiles Sort (A-Z) Show Archived Profiles + Add New Profile

Name	Color	Duration	Reason For Visit	Billing Profile	Payment Profile	Consent Forms	Updated	Created	
Physical Exam		30 minutes	Physical Exam			0	Aug 31, 2020	Aug 31, 2020	

- Select the profile you need from the **Billing Profile** menu.

Edit Custom Appointment Profile

Name:

Color:

Reason For Visit:

Duration: minutes (5-1200)

Billing Profile:

Payment Profile:

Enable for Online Scheduling:

Consent Forms:

- Click **Save** when finished.

Edit Custom Appointment Profile



Name

Color

Reason For Visit

Duration minutes (5-1200)

Billing Profile

Payment Profile

Enable for Online Scheduling Allow your patients to select this profile when they schedule an appointment with you online

Consent Forms Check to select consent forms



Save

Save as

Cancel

- Select the desired Appointment Profile from the **Profile** dropdown in the menu and **Save**. The appointment and billing information connected to the profile will populate the appointment window.

Schedule Appointment



Appointment

Billing

Eligibility

Vitals

Growthcharts

Flags

Log Comm.

Revisions

Custom Data

MU Helper

Type Appointment Video Visit Walk-in Transition of Care Referral

WARNING: This patient is pre-populated sample data.

Credit: \$2.00

54 past appointments

Primary Insurance: Aetna Better Health of New Jersey [46320]

CDS: Mammogram screening for all women aged 40-74

Fall Risk:

Gestational Diabetes:

Likes Cats:

Provider

Patient

Reason:

Scheduled: Time

Duration: minutes Allow overlapping

Notes:

Consent Forms: HIPAA Data Use Agreement (default)

No Show Policy (default)

Supervising

Office:

Profile:

Eligibility Profile:

Exam:

Color:

Status:

> 24h

[View Clinical Note](#)

[View All Appointments](#)

- Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
- Arrange a Follow-up Reminder
- View Active Reminders: