## How do I apply a discount on a patient's account?

07/24/2024 3:40 pm EDT

Applying a discount or adjusting part of your patient's invoice is easy with DrChrono!

Here are the steps to accomplish this task:

## • Navigate to Billing > Live Claims Feed

Billing
BILLING
Billing Summary
Live Claims Feed
Patient Payments
Day Sheet
Transactions
Remittance Reports
Unmatched ERAs
Insurance Credit Card Payments
Accounts Receivable
Patient Statements
Product/Procedure
Patient Balance Ledger
Fee Schedule
Underpaid Items
Adjustment Master
Sales Tax
Billing Log

• Pull up your patient's appointment by searching for it by name, claim ID, or date of service.

Live Claims Feed											
Select All Offices Select None Anursing home All • B Assisted Living All • C new office All • D Inpatient Hospital All • D Inpatient Hospital All •											
Discharge Summary All • patient statement remit address All • Primary Office All • Primary Office All • Telehealth All •											
Claim St 💿 💿 💿 All 🔻 Billing St: All 👻 Appt Profiles: All 👻 Calculate Counts 💿 What's this? TFL Warning											
Patient 🗉 Payer Name ID drc claim # 01/01/2021 - 02/01/2021 Clinical Note 🗸											
Open window in new tab 🗌 Check All Clear Update Filter											

• Once you have found your patient's appointment, click on the date of service (if applicable), so you are on the appointment screen.

Info	Claim ID	Patient	Date of Service	Office	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal
					Totals:	\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00
	158141998	Jenny (Jen) Harris	10/05/2020 09:00AM	Primary Office	Kermit Frog	\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00
					Totals:	\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00

• Scroll down to where the CPTs and payments are listed and click on the blue plus sign on the right. It is the

## Add Transaction button.

	Code/Check Date	Description	Mods/Posted Date	e Service Dat	e 😧 EPSD1	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type		
							Totals:		\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00	C Bill Insurance	≡	
	<b>C</b> 99214 🕂			From date	To date	1.00	0 1 0 0 0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	Balance Due	\$ 🔳	÷
0	10/28/2020		10/28/2020	Check # 12345	+	+			45: Charg	e excee 🗸	40.00	0	[1] Aetna	[ 1: Proces	sed : 🗸 🖸 CC	): Contr 🗸	ADJ INSURER	<b>X</b> ×	
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0	10/28/2020		10/28/2020	Check # 12345	+	+			3: Co-pa	/ment Ar 🗸	20.00	0	[1] Aetna	1: Proces	sed : 🗸 PR	: Patier 🗸	SKIP SECONDARY	×	
	+ Add Line Item	× Delete	Selected										C Re	parse ERA	i Claim	Info E	DI 837p 🗸 V	erify & Save	

 Once clicked, you should see an additional line open. It will be listed under any insurance/ERA payments posted.

	Code/Check Date	Description	Mods/Posted Date	Service Date	e e EPSDT	Qty/Mi	n Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
							Totals:		\$245.00	\$205.00	\$40.00	\$100.00	\$0.00	\$0.00	\$45.00	\$60.00	C Bill Insurance	=
	C 99214 🕂			From date	To date	1.0	0 1 0 0 0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	Balance Due	\$ = +
0	10/28/2020		10/28/2020	Check # 12345	+	+			45: Charg	e excee 🗸	40.00	0	[1] Aetna	1: Proces	ssed : 🗸 🕻 C	O: Contr 🗸	ADJ INSURER	×
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0	02/01/2021		02/01/2021	Check #	+				Insurance	Paymei 🗸 🗌	0	0	[1] Aetna	✓] 0: Settlee	d <b>~</b> ][	🗸		×
	+ Add Line Item X Delete Selected EDI 837p Verify & Save																	

- On this new line, you can update as needed to apply a patient discount.
  - Posted Date this will automatically default to the day you are entering the discount.
  - Check Number you can leave this blank since it does not apply
  - Drop Down you can use the drop-down to specify what type of transaction this is.
    - To adjust a patient balance, you would want to select either Patient Bad Debt Writeoff or Provider Discount.

✓ Insurance Payment			
Patient Bad Debt Writeoff			
Insurance Bad Debt Writeoff			
Transfer Balance to Patient			
Provider Discount			

• Adjustment box (red) - this is where you type the dollar amount you would like to adjust. No negative signs are needed; just the whole dollar amount. (Examples - 25.00 or 5.00)

(	Provider Discount 🗸	0	0	[0] N/A 🗸 🗸	0: Settled	v]v]	

- Payer box (blue box just above) this will default to the patient's insurance. If you are adjusting a patient balance, you should select N/A.
- Once the discount has been entered, click on Verify and Save and the system will adjust the amount you have requested.



• You can then update the appointment status to reflect the change (for example - change to Paid in Full) if the adjustment you made clears the entire balance.

You can further automate this process by setting up an edit to automatically adjust the balance when a claim's billing status is changed to Settled. Details on how to set this edit can be found here.