

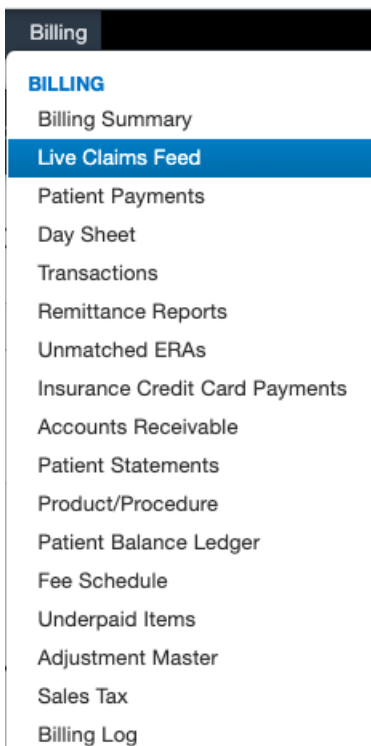
How do I apply a discount on a patient's account?

07/24/2024 3:40 pm EDT

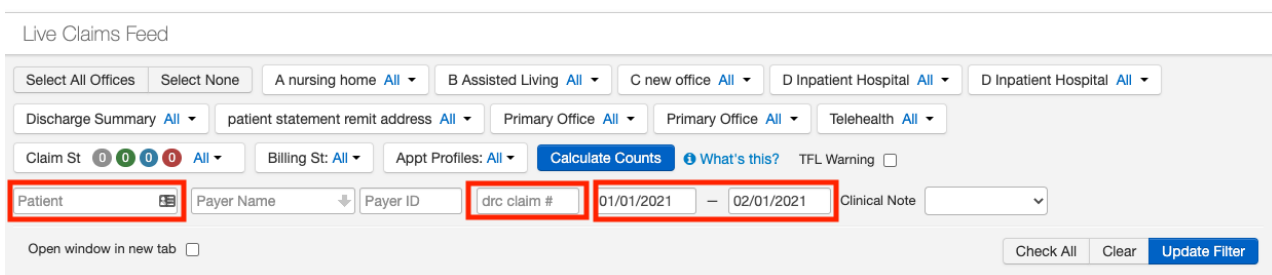
Applying a discount or adjusting part of your patient's invoice is easy with DrChrono!

Here are the steps to accomplish this task:

- Navigate to **Billing > Live Claims Feed**



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



- 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	Service Date	EPSDT	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	\$0.00	\$45.00	\$60.00	Bill Insurance
99214					1.00	1 0 0 0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	Balance Due
10/28/2020	10/28/2020	Check # 12345					45: Charge excee	40.00	0	[1] Aetna	1: Processed	CO: Contr	ADJ INSURER			
10/28/2020	10/28/2020	Check # 12345					Insurance Payme	0	100.00	[1] Aetna	1: Processed	CO: Contr				
10/28/2020	10/28/2020	Check # 12345					2: Coinsurance Ai	15.00	0	[1] Aetna	1: Processed	PR: Patier	PATIENT RESP			
10/28/2020	10/28/2020	Check # 12345					3: Co-payment Ar	20.00	0	[1] Aetna	1: Processed	PR: Patier	SKIP SECONDARY			

- 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	EPSDT	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	\$0.00	\$45.00	\$60.00	Bill Insurance
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10/28/2020	10/28/2020	Check # 12345					Insurance Payme	0	100.00	[1] Aetna	1: Processed	CO: Contr				
10/28/2020	10/28/2020	Check # 12345					2: Coinsurance Ai	15.00	0	[1] Aetna	1: Processed	PR: Patier	PATIENT RESP			
10/28/2020	10/28/2020	Check # 12345					3: Co-payment Ar	20.00	0	[1] Aetna	1: Processed	PR: Patier	SKIP SECONDARY			
02/01/2021	02/01/2021	Check #					Insurance Payme	0	0	[1] Aetna	0: Settled	-----				

- 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	-----
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- 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.

Verify & Save

- 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](#).