## 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 A nursing home All	B Assisted Living All	C new office All -	D Inpatient Hospital All -	D Inpatient Hospital All -
Discharge Summary All - patient statement remit add	ess All - Primary Office A	Primary Office	All - Telehealth All -	
Claim St 0 0 0 0 All - Billing St: All - A	opt Profiles: All - Calculate	Counts	7 TFL Warning	
Patient 🖪 Payer Name 🛡 Payer	D drc claim # 0	1/01/2021 — 02/01	/2021 Clinical Note	~
Open window in new tab				Check All Clear Update Filte

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

C	Inf	o 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
C	)	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	\$45.00	\$60.00	C Bill Insurance		=
	C 99214 🔶		From date	Fo date	1.00	1000	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	Balance Due	\$	iii (+
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		×
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0	10/28/2020	10/28/2020	Check # 12345	+	+			3: Co-pay	ment Ar 🗸	20.00	0	[1] Aetna 🔹	1: Proces	sed : 🗸 PF	: Patier 🗸	SKIP SECONDARY		×
	+ Add Line Item	× Delete Selected										2 Re	parse ERA	i Claim	Info E	DI 837p 🗸 Ve	ərify &	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	EPSDT	Qty/Mi	n Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt F	aid Ir	ns 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	01000	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00		\$0.00	\$0.00	\$35.00	Balance Due	\$		۲
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0	10/28/2020	10/28/2020	Check # 12345	+	+			Insurance	Paymei 🗸	0	100.00	[1] Aetna	• 1:	Processed	: • CC	): Contr 🗸			×	
0	10/28/2020	10/28/2020	Check # 12345	+	+			2: Coinsu	rance Ai 🗸	15.00	0	[1] Aetna	• 1:	Processed	I: V PF	l: Patier 🗸	PATIENT RESP		×	
0	10/28/2020	10/28/2020	Check # 12345	+	+			3: Co-pa	/ment Ar 🗸	20.00	0	[1] Aetna	•] [1:	Processed	I v PF	I: Patier 🗸	SKIP SECONDARY	(	×	
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•	Add Line Item	× Delete Selected										2 R	eparse	ERA	<b>i</b> Claim	Info E	DI 837p 🗸 Ve	erify &	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	
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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.



• 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.