How to Track Bulk Appointment Packages with Authorizations in DrChrono

07/24/2024 5:00 pm EDT

Appointment packages are used when patients buy a certain number of appointments to be used for a certain time period. For example, some providers will offer packages of 20 appointments a month or 120 appointments a year. It is possible to track appointment packages purchased by patients in your DrChrono account. Please see the following steps to learn how to track appointment packages.

1. The first step is to create a custom procedure code. You can create a custom code by going under **Billing** > **Coding** > **New Custom Procedure**.

Billing	Account	Mar	ketplace	Help	₩-			
BILLING			BUSINES	S INTELLIO	ENCE			
Billing S	ummary		Denial A	nalysis 2.0	D			
Live Cla	ims Feed		Paymen	t Analysis	2.0			
Patient	Payments (Beta	a)	CODING					
Day She	et		Code Se	earch				
Transac	tions		New Cu	stom Proc	edure			
Remitta	nce Reports		Custom	Procedure	es			
Unmatc	hed ERAs		ENDOLLA	AENTO				
Account	ts Receivable		Bulk Edi	t Paver ID	•			
Patient	Statements		buik cuit Payer IDs					
Product	/Procedure		Pavor Soarch					
Patient	Balance Ledge	r	T ayor o	caron				
Fee Sch	edule							
Underpa	aid Items							
Adjustm	ent Master							
Sales Ta	ix							
Billing L	og							

2. Next enter the information such as Quantity Units, Notes, Price, and Type of Product. You have the option to choose either Service or Product under Type of Product.

New Custom Procedure

Codo		ID of procedure in system
Code	OAFFOINTMENTFACK	ib of procedure in system.
Quantity units	1	
Description	8 prepaid appointments	
Note		
Sales tax applicable	Is sales tax applicable to this service	e/product?
Price	1600]
Price with tax	0.00]
Allowed amount		
Cost	1600	Base cost for consumables.
Duration		
	Length of a procedure in minutes.	
Type of product	Service ~	
	Save Cancel	

2. Next, go to the patient chart, click on Demographics on the left-hand side, and then click on **Authorizations**. Click the green button that says **Add New Authorization**.

Important Demogra	aphics In	surances Authorizations	Smoking Statu	is Flags E	Balance onpa	atient Payments					
✓ Sufficient patient demographics to bill insurance. Fall Risk											
Insurance Author	nsurance Authorizations + Add New Authorizations										
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes			
Expired Authoriza	ations										
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes			
	Save Demographics Save & Close										

3. Fill out an authorization number(you can make up your own number) end date or the number of visits, and the custom code you created. Click **Create** to add the authorization to the patient.

New Authorization

Authorization number	8APPTPACK
Start date	03/30/2022
End date	
	(End date and/or number of visits must be provided)
Number of visits	8
	(End date and/or number of visits must be provided)
Specialty	(optional)
Notes	
Pending	 optional: Pending authorization will not be applied to claim)
Procedure codes	× 8APPOINTMENTPACK (optional)
	Create

You will see the authorization, the number of visits total, and the number remaining in the patient's chart.

					Visits Appro	oved	Visits Remaining		
					8.0		8.0		
							A		
Important Demographic	cs Insurance	Authorizations Smoking St	atus Flags Balance	onpatient Payr	nents				
 Sufficient patient demo 	graphics to bill	insurance. 🍽 Fall Risk							
nsurance Authorizat	ions							+ Add Nev	v Authoriza
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes	
BAPPTPACK	Active	8APPOINTMENTPACK	03/30/2022			8.0	8.0		
Expired Authorizatio	ns								
Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	N	otes
	Save Demogr	aphics							

3. When you enter this custom code into an appointment, it will start counting down the number of visits that the Authorization covers. This process will start after the appointment has occurred.

×

Schedule Appointment									×
Patient Payment	\$ 0	Copay: \$20	+			Auto Accident	No	•	
Pre Authorization Approval	8APPTPA	СК				Other Accident	No	•	
Referral #	i								
Payment Profile	Cash		~			Onset Date Type	Onset of Curren	nt Symptoms o 🗸	
Billing Profile						Onset Date			
Billing Pick List	Choose C	odes from Pick List				Other Date Type	- Other Date Ty	rpe - 🗸	
Diagnosis Pick List	Choose C	odes from Pt Proble	ems			Other Date			
Credit Card Payment	Process C	Credit Card							
Claim Billed: \$1,600.00 Adj	ustment: \$0.	00 Insurer Paid:	\$0.00 Patie	nt Paid: \$	\$0.00				
ICD-10 Codes		Find Diagnosis c	odes	+	CPT	Codes		Find CPT Procedure co	des 🔸
# Code	Descriptio	n			Code	Descr	iption	Price (\$)	
ICD-9 Codes to Conv	ort	Find Diagnosis o	odes		HCP	CS Codes		Find HCPCS Procedure	codes -
# Code	Descriptio	n	0065		Code	Descr	intion	Price (\$)	codes 🔶
# 0000	Descriptio				oode	Desci	puon	1100 (4)	
NDC Codes		Find NDC Codes	;	+					
NDC Code Quan	tity	Units Line	Item						
Custom Codes		Find Oustans Dra							
Custom Codes		Find Custom Pro	ceaure coaes	s 🖤					
Code Descr	iption Pi	rice (\$)							
8APPOINTMENTPACK 8 prep appoin	ntments	600.00		× <					
	Quantity: 1	.00]					

4. Once you get down to 4 visits, this will generate a flag on the patient's account. This is the process of tracking appointments for a single patient. You can create other custom codes for different numbers of appointments and new authorizations for other patients as well. If you click on the Authorization number you can see the visits connected to the authorization.

LING WARNIN	ion / torritor												
							Visits A	pprov	ed		Visite	Remai	nin
							8.0				4.0		
Important Demograp	phics Insuring	Authorizations	Smoking Status	Flags Balance	e onpatient Pay	ments				1			
BILLING WARNING: Aut	horization #8APP	TPACK has 0 of 4 allowed	visits scheduled.										
. Sufficient patient der	nographics to bi	lineurance	ck										
 Sufficient patient der 	nographics to bi	Il insurance. 🏴 Fall Ris	sk										
 Sufficient patient der DSUrance Authoriz 	nographics to bi	Il insurance. 🎏 Fall Ris	sk								+ A0	id New Authori	ation
 Sufficient patient der Insurance Authoriz 	nographics to bil ations	Il insurance. 📁 Fall Ris	sk								+ Ad	id New Authori:	ration
 ✓ Sufficient patient der Insurance Authoriz Authorization # 	nographics to bi ations Status	Il insurance. Fall Ris	sk	Start Date	End Date	Specialty	Visits Approved		Visits Remaining		+ Ad	Id New Authori	ration
✓ Sufficient patient der Insurance Authoriz Authorization # BAPPTPACK ◀	ations Status Active	Il insurance. Fall Ris Procedure Codes 8APPOINTMENTPACK	sk	Start Date 03/01/2022	End Date	Specialty	Visits Approved 8.0		Visits Remaining 4.0		+ Ad	Id New Authori	zation
 ✓ Sufficient patient der Insurance Authoriz Authorization # BAPPTPACK Date of Service 	ations Status Active	Il Insurance. Me Fall Ris Procedure Codes 8APPOINTMENTPACK	sk Provider	Start Date 03/01/2022	End Date	Specialty Reason	Visits Approved 8.0	Office	Visits Remaining 4.0	Status	+ Ad	id New Authori	zation
Sufficient patient der nsurance Authoriz Authorization # BAPPTPACK Date of Service 03/30/2022 08:30AM	ations Status Active	Il Insurance. Fall Ris Procedure Codes 8APPOINTMENTPACK	sk Provider Dr. James	Start Date 03/01/2022 Smith	End Date	Specialty Reason	Visits Approved 8.0	Office Office 1	Visits Remaining 4.0	Status	+ Ad	Id New Author	zation
Sufficient patient der Insurance Authoriz Authorization # 8APPTPACK Date of Service 03/30/2022 08:30AM 03/29/2022 09:00AM	anographics to bil cations Status Active	Il insurance. Fall Ris Procedure Codes BAPPOINTMENTPACK	Sk Provider Dr. James Dr. James	Start Date 03/01/2022 Smith Smith	End Date	Specialty Reason	Visits Approved 8.0	Office 1 Office 1	Visits Remaining 4.0	Status Balance Due	+ Ad	id New Authori	zation
Sufficient patient der Insurance Authoriz Authorization # BAPPTPACK Date of Service D3/30/222 08:00AM 03/29/2022 09:00AM 03/29/2022 09:00AM	nographics to bil cations Status Active	Il insurance. Fail Rif	sk Provider Dr. James Dr. James Dr. James	Start Date 03/01/2022 Smith Smith Smith	End Date	Specialty Reason	Visits Approved 8.0	Office Office 1 Office 1 Office 1	Visits Remaining 4.0	Status Balance Due	+ Ad	id New Authori	zation

Note: Each time you enter the code it will charge the amount associated with it. There are a couple of ways to handle this depending on how you would collect payments for the package.

1. You can make your custom code reflect the amount you will allocate for each appointment. In this example, instead of \$1600, it would be \$200. You can still collect the full package payment and then allocate it to each appointment.

New Custom Procedure

Code	8APPOINTMENTPACK	ID of procedure in system.
Quantity units	1	
Description	8 prepaid appointments	
Note	200 per session.	
Sales tax applicable	Is sales tax applicable to this service	e/product?
Price	200]
Price with tax	0.00]
Allowed amount]
Cost		Base cost for consumables.
Duration	:)
	Length of a procedure in minutes.	
Type of product	Service ~	·J
	Save Cancel	

For the first appointment, we are charging \$200 for the appointment but collecting \$1600 for the package of 8 appointments.

				s	chedule Appoi	intment									26
	\$	1600.00	Copay: \$20)	Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper	r
				_							Patient Supe	rBill 🔻 Clini	cal Note Billing	Details	ther Forms 🔻
					Ø Bi	illing Status			~	HCFA Bo	x 10 - Is patient	s condition re	lated to:		
						CD Version	ICD-10		~		Employmen	t No	~		
					Patie	nt Payment	\$ 1600.0	00 Copay: 9	\$20 + -		Auto Accider	t No	~		
						t	Receipt *				Other Accider	t No	~		
					Pre Authorization	on Approval	8APPTPAC	СК			Onset Date Tvn	Onset of C	urrent Symptom	15.0 ×	
						Referral #					Onset Date	a			
					Payr	ment Profile	Cash		~		Other Date Typ	e - Other Da	te Type -	~	
					B	Illing Profile	Choose C	ordee from Pick	Liet		Other Dat				
					Diagnos	tis Pick List	Choose Cr	odes from Pt P	roblems						
					Credit Ca	rd Payment	Process C	redit Card							
					Claim Billed: \$200	.00 Adjus	tment: \$0.00	Insurer Pa	d: \$0.00 Patient Pai	: \$200.00					
					ICD-10 Code	s		Find Diagno	sis codes 🔹	CF	T Codes		Find CPT	Procedure ci	odes 🔸
					V Code		Description	n		Cod	e Des	cription		Price (\$)	
					ICD-9 Codes	to Conve	urt	Find Diagon	in opdon	н	PCS Codes		Find HCP	CS Procedur	a codos 📕
					Code	to conve	Description	n	sis coues 🔍	Cod	e Des	cription	(Find Hor)	Price (\$)	e codes 🔶
					NDC Codes			Find NDC C	odes 🕂						
				P	NDC Code	Quant	ity	Units	Line Item						
					Custom Code	es		Find Custon	Procedure codes 🚸						
					Code	Descri	ption Pr	ice (\$)							
				•	BAPPOINTMENTPA	ACK 8 prepa	tments 2	00.00	×	←	_				
Custom Codes		Find 0	Custom Procedure codes			٩	uantity: 1.	.00							
Code	Descript	ion Price (\$)			Include note in E	EDI Billing:	Custom I	NTE EDI Billin	g Note (a.k.a. HCFA/C	MS-1500 L	ine 19)				
8APPOINTMENTPACK	8 prepaid appointm	200.00) × •					Delete Save & O	Close Sa	Cancel				
	Qua	intity: 1.00													

You can then allocate payments to subsequent appointments as they happen.

Patient Payments	Payment	s Line Items	s Logs Sta	ements Balance								
Laurie Sample												
From To	Filt	ter by Range: \$	-	\$ P	rovider: All -							
Simple: On	Simple: On Condensed: On Internal: Off											
	Total Paid	Allocat	ed Payment (Paid to	Appt) Unallocated P	ayment	Statement Balance		Total	Balance			
Laurie Sample	\$1,600.00		\$800.00	\$800.00)	\$200.00		-\$	800.00		C Au	ıto Fill
Print/Export - Ado												
# Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total		
▼ 4 □ \$800.00	Mar 31, 2022	Mar 31, 2022	3/22/2022 07:20AM		Dr. James Smith	Cash	Credit		\$800.00	\$1,600.00	۲	⊖Receipt
	Mar 31, 2022	Mar 31, 2022	3/31/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	0	\$200.00		۲	Beceipt
	Mar 31, 2022	Mar 31, 2022	3/29/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	0	\$200.00		۲	BReceipt
	Mar 31, 2022	Mar 31, 2022	3/24/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	0	\$200.00		۲	Beceipt
	Mar 31, 2022	Mar 31, 2022	3/22/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	0	\$200.00		۲	Beceipt

2. In this example, we are going to collect \$1600 on the first visit, and on subsequent visits, we can change the price to \$0. The authorization will still count down the visits.



First Appointment

Custom Codes		Find Custom Procedure codes 🖊				
Code	Description	Price (\$)				
8APPOINTMENTPACK	8 prepaid appointments	1600.00 ×				
	Quantity:	1.00				

Custom Codes			Find Custom Procedure codes	÷
Code	Description	Pri	ce (\$)	
8APPOINTMENTPACK	8 prepaid appointments	0.	00	x
	Quantity:	1.	00	

Subsequent Appointments