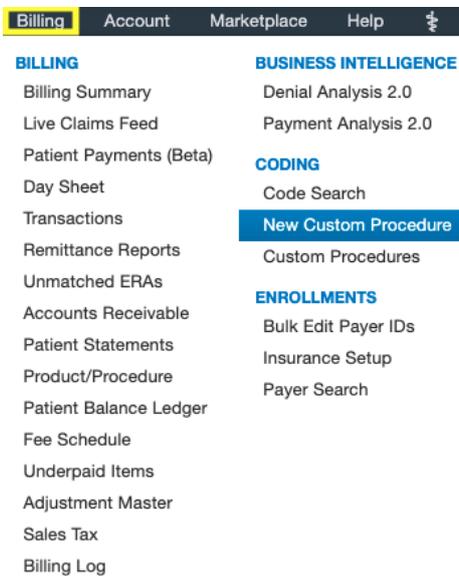


How to Track Bulk Appointment Packages with Authorizations in DrChrono

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**.



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

Code ID of procedure in system.

Quantity units

Description

Note

Sales tax applicable Is sales tax applicable to this service/product?

Price

Price with tax

Allowed amount

Cost Base cost for consumables.

Duration

Length of a procedure in minutes.

Type of product

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 Demographics Insurances **Authorizations** Smoking Status Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance.

Insurance Authorizations

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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Expired Authorizations

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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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

Start date

End date

(End date and/or number of visits must be provided)

Number of visits

(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 (optional)

Create

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

Visits Approved	Visits Remaining
8.0	8.0

Important Demographics Insurances Authorizations Smoking Status Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance. Fall Risk

Insurance Authorizations

+ Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
8APPTPACK	Active	8APPOINTMENTPACK	03/30/2022			8.0	8.0	

Expired Authorizations

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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Save Demographics

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	8APPTPACK			Other Accident	No
Referral #				Onset Date Type	Onset of Current Symptoms o
Payment Profile	Cash			Onset Date	
Billing Profile			+	Other Date Type	- Other Date Type -
Billing Pick List	Choose Codes from Pick List			Other Date	
Diagnosis Pick List	Choose Codes from Pt Problems				
Credit Card Payment	Process Credit Card				

Claim Billed: \$1,600.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

ICD-10 Codes

#	Code	Description
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CPT Codes

Code	Description	Price (\$)
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ICD-9 Codes to Convert

#	Code	Description
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HCPCS Codes

Code	Description	Price (\$)
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NDC Codes

NDC Code	Quantity	Units	Line Item
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Custom Codes

Code	Description	Price (\$)
8APPOINTMENTPACK	8 prepaid appointments	1600.00
	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.

BILLING WARNING: Authorization #8APPTPACK has 0 of 4 allowed visits scheduled.

Visits Approved	Visits Remaining
8.0	4.0

Important Demographics **Insurances** Authorizations Smoking Status Flags Balance onpatient Payments

BILLING WARNING: Authorization #8APPTPACK has 0 of 4 allowed visits scheduled.

✓ Sufficient patient demographics to bill insurance. Fall Risk

Insurance Authorizations + Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
8APPTPACK	Active	8APPOINTMENTPACK	03/01/2022			8.0	4.0	

Date of Service	Provider	Reason	Office	Status
03/30/2022 08:30AM	Dr. James Smith		Office 1	
03/29/2022 09:00AM	Dr. James Smith		Office 1	Balance Due
03/21/2022 09:00AM	Dr. James Smith		Office 1	
03/24/2022 09:00AM	Dr. James Smith		Office 1	

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 ID of procedure in system.

Quantity units

Description

Note

Sales tax applicable Is sales tax applicable to this service/product?

Price

Price with tax

Allowed amount

Cost Base cost for consumables.

Duration Length of a procedure in minutes.

Type of product

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

\$ 1600.00

Copay: \$20

Custom Codes

Code	Description	Price (\$)
8APPOINTMENTPACK	8 prepaid appointments	200.00

Quantity:

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status

ICD Version

Patient Payment \$ 1600.00 Copay: \$20

Pre Authorization Approval

Referral #

Payment Profile

Billing Profile

Billing Pick List

Diagnosis Pick List

Credit Card Payment

HCFA Box 10 - Is patient's condition related to:

Employment

Auto Accident

Other Accident

Onset Date Type

Onset Date

Other Date Type

Other Date

Claim Billed: \$200.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$200.00

ICD-10 Codes

ICD-9 Codes to Convert

NDC Codes

Custom Codes

Code	Description	Price (\$)
8APPOINTMENTPACK	8 prepaid appointments	200.00

Quantity:

Include note in EDI Billing:

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

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Laurie Sample

From: To: Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off

Update

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
Laurie Sample	\$1,600.00	\$800.00	\$800.00	\$200.00	-\$800.00

Auto Fill

Print/Export + Add

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
4	\$800.00	Mar 31, 2022	Mar 31, 2022	3/22/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit		\$800.00	\$1,600.00
		Mar 31, 2022	Mar 31, 2022	3/31/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit		\$200.00	
		Mar 31, 2022	Mar 31, 2022	3/29/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit		\$200.00	
		Mar 31, 2022	Mar 31, 2022	3/24/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit		\$200.00	
		Mar 31, 2022	Mar 31, 2022	3/22/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit		\$200.00	

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.

New Custom Procedure

Code: 8APPOINTMENTPACK ID of procedure in system.

Quantity units: 1

Description: 8 prepaid appointments

Note:

Sales tax applicable: Is sales tax applicable to this service/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

First Appointment

Custom Codes Find Custom Procedure codes

Code	Description	Price (\$)
8APPOINTMENTPACK	8 prepaid appointments	1600.00
	Quantity:	1.00

Subsequent Appointments

Custom Codes Find Custom Procedure codes

Code	Description	Price (\$)
8APPOINTMENTPACK	8 prepaid appointments	0.00
	Quantity:	1.00