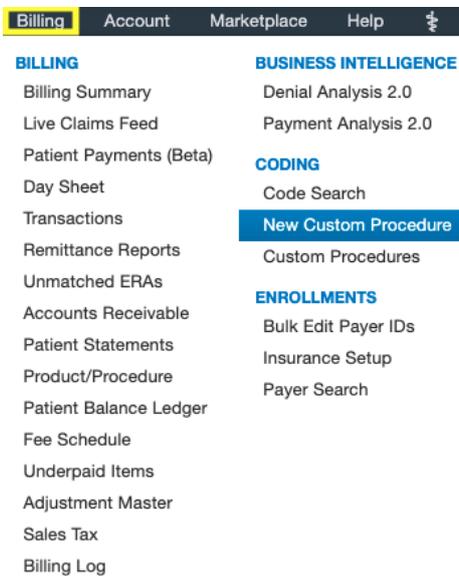# How to Track Bulk Appointment Packages with Authorizations in DrChrono

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	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

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.   ⚑ Fall Risk

Insurance Authorizations

+ Add New Authorization

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

Expired Authorizations

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 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	

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.

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.

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/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	

Save Cancel

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

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

	#		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		Dr. James Smith	Cash	Credit		$800.00	$1,600.00	⊕	🖶Receipt
		☐		Mar 31, 2022	Mar 31, 2022	3/31/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	❶	$200.00		⊕	🖶Receipt
		☐		Mar 31, 2022	Mar 31, 2022	3/29/2022 07:50AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	❶	$200.00		⊕	🖶Receipt
		☐		Mar 31, 2022	Mar 31, 2022	3/24/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	❶	$200.00		⊕	🖶Receipt
		☐		Mar 31, 2022	Mar 31, 2022	3/22/2022 07:20AM	8APPOINTMENTPACK	Dr. James Smith	Cash	Credit	❶	$200.00		⊕	🖶Receipt

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

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

Subsequent Appointments

Custom Codes

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