

INTERNAL: Import Fee Schedule v.2

07/24/2024 5:35 pm EDT

To import a customer's Fee Schedule follow the steps below.

1. Log into your employee account.
2. From the internal tools tab (Swords Icon) choose 'Setup/Enrollment', or click [here](#).

Setup / Enrollment

Initial Implementation Implementation Form

Billing Assign Medical Biller EDI Follow Up Enrollment Graphs

eRx eRx Prescriber Setup ID.me Enrollment Management PDMP Setup Identity Verification Reset Copy Favorite Prescriptions Copy Favorite Pharmacies

Labs Lab Accounts Upload LabCorp Payers File

Faxing Fax Line Management

Import Data Transfers Patients Fee Schedules Custom Procedures Custom Categories Referral Contacts

Box Sync Box Sync

- 3.) Under the import category select 'Fee Schedule', or click [here](#).

Please Note: The fee schedules **MUST** be in a .CSV format for the import to be successful. Additionally, there **MUST** be a header row that matches the one below. See the example. The column can be blank/contain no data, but the header row must be there.

Assignee Type	Plan Name	Assignees	Specialities	Offices	Insurance Payers	Effective Date	Ineffective Date	Procedure	Type	Custom Description	Price	Allowed	Picklist Category	CPT/HCPCS Modifier	NDC Code	NDC Quantity	NDC Units	Service Code
1 individual	Plan A			Payer id			0490	Revenue	Custom rev code desc	\$12.34	\$10.00	picklist	NA	0991-3452-01	12.233	F2	12345	
2 individual	Plan A	1234 34456		Payer id1 Payer id2			0490	Revenue	Custom rev code desc	\$13.34	\$20.00	picklist	NA	0991-3452-01	12.233	F2	12345	
3 speciality	Plan B					2020-01-01	2020-12-31	66666	HCPCS	desc	\$1.00		picklist	0268-1234-50				
4 speciality	Plan B		Pediatric Registered Nurse Perinatal Registered Nurse			2020-01-01	2020-12-31	66666	HCPCS		\$5.00		picklist	0268-1234-50				

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HCPCS	desc	\$1.00		picklist		0268-1234-50				
HCPCS		\$5.00		picklist		0268-1234-50				

Once you have the .CSV file in the correct format do the following:

- 4.) Under the 'Upload File' section type in the doctor's name into the given field and select them from the dropdown.
- 5.) Click on 'Choose File' under the doctor's name.
- 6.) From the Finder window that pops up navigate to the correctly formatted .CSV file and open it.
- 7.) Click 'Upload' and if you have done everything correctly the file will upload into the doctor's account.

8.) Remove the feature flag for the account to expose Fee Schedule v2 in production to the customer.

To confirm the Fee Schedule was uploaded correctly break the glass on the customer's account to view.
