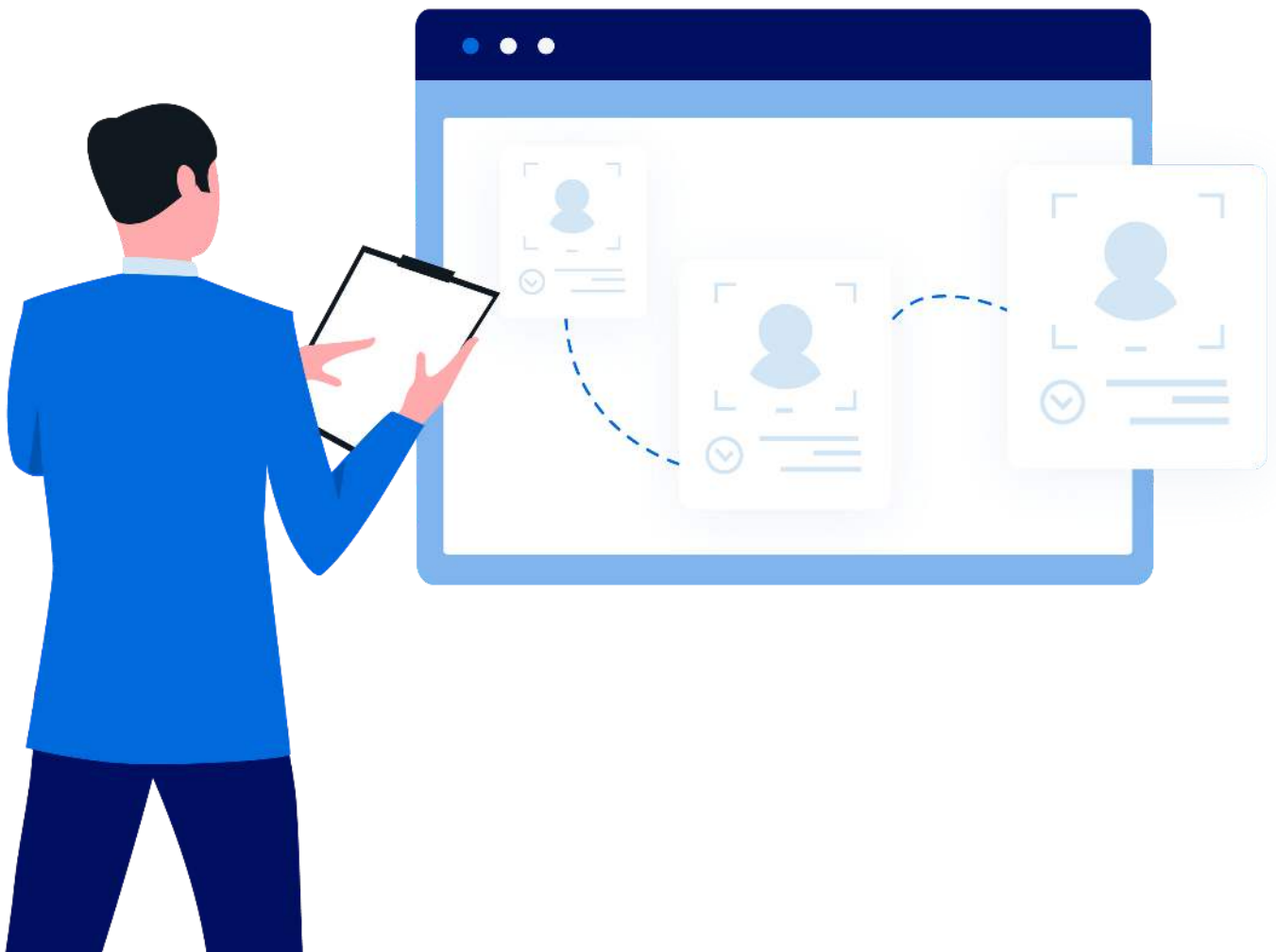


Help Articles

How Do I Add a Fee Schedule?



How Do I Add a Fee Schedule?

Click the word "Setup" and choose the "Fee Schedules" and "Fee Schedule Setup" options from the drop-down box. Click the 'Add New Schedule' or 'Add Fee Schedule Wizard' button, and confirm the addition.

Fee Schedule Wizard

Users can still add one the traditional way. But the wizard guides the user through setup and assignment. The wizard was designed to help reduce setup errors.

The wizard leads the user through:

- Schedule Type
- Offices (all or specific)
- Providers (all or specific)
- Adding the Fee Schedule (copying from an existing schedule, importing an Excel file, or entering manually)

If going the traditional route:

Choose a "Fee Schedule Type". The fee fields will change according to the type selected. Type a meaningful schedule name in the "Name" field. Input the fees for the new schedule, and click the Save button.

NOTE: Once a fee schedule name has been assigned a particular type, the type cannot be changed. Rather, the fee schedule amounts must be re-entered with the correct fee schedule type indicated is a change in type is required.

How Do I Add a Fee Schedule?

If the new schedule is extremely similar to an existing fee schedule, select the existing schedule in the “Copy fees from existing fee schedule” field and click the Go button. Type a meaningful schedule name in the “Name” field. Make the necessary changes to the fees for the new schedule, and click the Save button.

NOTE: Copying fee schedules will result in a one-to-one exact copy. That is, the financial amounts will be copied, and the new schedule will be the same type as the original.

If the new schedule is saved on the user’s computer in a Microsoft® Excel file, click the “Browse” button to locate the saved file on the user’s computer. The file name will appear in the “Import from Excel file” field. Select the appropriate schedule type for the “Fee Schedule Type” field. Click on the Import button. Type a meaningful schedule name in the “Name” field, and click the Save button.

