dd a Fee Schedule from imported prices

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ollow the steps below to add a fee scheduled based on imported prices.

art 1: Create a Spreadsheet

1. The first row of the spreadsheet should only contain **column names**.
2. Label the **First** column of the spreadsheet as **Code**, it should contain the list your **billing codes**.
3. Label the **Second** column of the spreadsheet as **Description**, it should contain the list of **code descriptions**.

> ⚠ If the code is not in your local list, it will be added with this description. If a code is in your local list, but doesn't have a description, it will add the description from the spreadsheet.

4. Label the **Third** column of the spreadsheet as **Default**, it should contain the list of **default billing prices**.

> ⚠ If the code is not in your local list, it will be added with this default price.

5. Label the **Fourth** column of the spreadsheet as **Price**, it should contain list of **Billing Prices**.

Example Format

Column headers must be the first row. Columns marked with a * are required.

Code *	Description	Default	Price *
99212	If the code is not in your local list, it's added with this description. OFFICE VISIT	If the code is not in your local list, it's added with this default price. 45.00	50.25

6. **Save** the spreadsheet as a Comma delimited (.csv), Excel (.xls or .xlsx) file.

> ⚠ Only the first sheet/tab will be imported.

art 2: Importing into CollaborateMD

1. Select **Customer Setup** > **Codes...** > **Fee Schedules**.
2. Click the **New Fee Schedule** button.
3. Select the **Import Prices** option.

4. Use the **File to Import** field to upload the spreadsheet.
5. Click the **Show Preview** to import the spreadsheet.
6. **Type** the name for the contact in the Name field.
7. Enter the **Effective From** and **Effective To** dates.
8. Write a **Description** of your fee schedule.
9. Within the **Fee Schedule** tab, a list of your CPT/HCPCS and Revenue Codes will display.

> ⚠ At least one CPT/HCPCS and Revenue code must be added in order to create a new fee schedule.

10. **Add your prices** to the codes on the **Price** column.
11. From the **Configuration** tab, select how to apply your fee schedule.
    1. **Apply based on payer, payer type, or patient type** This option will allow you to apply this fee schedule to a specified primary payer, primary payer type, or patient type.
    2. **Apply based on location or provider**: This option will allow you to apply this fee schedule to a specified rendering provider, rendering provider's practice, facility, or facility and provider.
    3. **Apply based on Place of Service or Type of Service**: This option will allow you to apply this fee schedule to a specified POS or TOS.
12. Select your configuration fields.
13. Click **Save**.
