

Client Fees

Description: In this topic, the user will learn about client fees. Client Fees allow a user to specify various fee types in the system and associate them with a particular funding account. Once specified, these fees will be deducted from the authorization remaining balance without utilizing a punch.

*Please note: Client fees only apply to dollar-based authorizations. Client Fees can be mass-imported and mass-approved. To learn how to import Client Fees, see the article Admin Guide - Import Module in the Help Center.

Role Required: Super User, Billing Team

Permission Required: Import Admin

FI Mode Only

Add Client Fee Type

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Custom Drop Down** from the submenu
4. Click **Actions**
5. Select **Add New Custom Drop Down Item** from the drop-down menu
6. Complete the Add New Custom Drop Down Item form wizard
 - a. Item Type: Select **Fee Type**
 - b. Item Name: Create a name for the fee type
 - c. Item Status: Select **Active** or **Inactive**
7. Click **Save** and **Yes** to confirm

View, Edit, or Export Client Fee Type

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Custom Drop Down** from the submenu
4. Select **Fee Type** in the Select Item Type filter drop-down menu
5. Click **Search**
 - a. View the results table below the search box
 - b. Optionally, click **Export** to download to a CSV file.
6. Click **anywhere in the Fee Type row** to view or edit it
7. The **Custom Drop Down Details** page will open
8. Click **Actions**
9. Select **Edit Custom Drop Down Item** from the drop-down menu
10. Make edits as needed in the Edit Custom Drop Down Item form wizard
11. Click **Save** and **Yes** to confirm

Add Client Fee to Funding Account

1. Log in to DCI
2. Select **Authorization** from the main menu
3. Select **Funding Accounts** from the submenu
4. Enter specific criteria into the filters and click **Search**
5. Click **anywhere in the row** to select the Funding Account
 - a. Please note: The funding type must be dollars to add a new client fee
6. The funding Account Details page will open
7. Click **Actions**
8. Select **Add New Client Fee** from the drop-down menu
9. Complete the Add New Client Fee form wizard
 - a. Entry Type: Defaults to Fee
 - b. Fee Type: Select the fee type from the drop-down menu
 - c. Date (**required**): Add the date of the fee
 - d. Amount (**required**): Add the amount of the fee
 - e. Description: Add a description of the fee
10. Click **Save** and **Yes** to confirm

Approve/Reject Client Fees

1. Log in to DCI
2. Select **Authorization** from the main menu
3. Select **Pending Fees and Adjustments** from the submenu
4. In the filter Select Entry Type, select **Fee**. Enter other specific criteria as needed and click **Search**.
5. In the results table, under the **Approve** column:
 - a. Click **A** to approve OR click the red **R** to reject
 - b. Optionally, click anywhere in the pending fee row to open the Client Fee Details page.
 - i. Click **Actions** and select **Approve** or **Reject** from the drop-down menu
6. Select **Yes** in the confirmation alert window

View, Edit, or Export Client Fees

1. Log in to DCI
2. Select **Authorization** from the main menu
3. Select **Clients Fees and Adjustments** from the submenu
4. In the filter Select Entry Type, select **Fee**. Enter other specific criteria as needed and click **Search**.
 - a. View results
 - b. Optionally, click **Export** to download to a CSV file.
5. **Click anywhere in the fee row** to open the Client Fee Details page
6. Click **Actions**
7. Select **Edit Client Fee** from the drop-down menu
8. Complete edits as needed in the Edit Client Fee form wizard
9. Click **Save** and **Yes** to confirm
 - a. A new client fee in Pending status will be created for the new amount. Follow the instructions above to Approve Client Fees.
 - b. The previous client fee will move to Rejected status and have a reference entry for the new client fee

Related articles

- [Billing Quick Reference](#)
- [Billing Module - Admin Guide](#)
- [User Guide - Add/Edit CPT/HCPCS Codes](#)
- [Authorization - Manage Remaining Balances](#)
- [Authorization - Billing Rate Changes](#)