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

- Roles Overview
- Billing Quick Reference
- Billing Module Admin Guide
 User Guide Add/Edit CPT/HCPCS Codes
- Authorization Manage Remaining Balances