

How Do I Update the Default Payment Profile?

07/24/2024 3:25 pm EDT

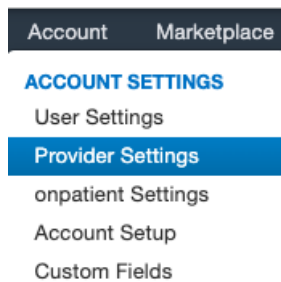
There are two ways of setting a default payment profile.

1. Set the default payment profile in general for all patients.
2. Set the default payment profile for a particular patient.

All Patients

First, let us see how to set the default payment profile in general for **all** of your patients:

1. Hover the cursor on the **Account** tab and select **Provider Settings**.



2. Click on the **Medical Billing** tab.

Account Settings

Profile General Email Medical Billing eRx Info Services Usage My Billing Sample Data Security Patient Payments

3. Under the **Miscellaneous** heading, look for **Default Patient Payment Profile**.

Miscellaneous

Default ICD Code Version The default ICD version (ICD-9 or ICD-10) for new created appointment

Copying billing respects provider "Copy Last Billing" in billing profiles dropdown and "Auto Copy Procedures" copy billing data from the last appointment scheduled by you.

Copy Proc From Pt's Last Appt Auto copy procedures from patient's last appointment when scheduling a new professional appointment (won't take effect when new appointment is having billing profile attached).

Copy Dx From Pt's Last Appt Auto copy diagnosis from Patient's last appointment when scheduling a new professional appointment.

Copy Dx From Pt's Problem List Auto copy diagnosis from patient problem list when scheduling a new professional appointment (won't take effect when Copy Diagnosis From Patient's Last Appointment is checked).

Auto Set Problems Automatically adds ICD10 codes to patients problem list when appointment is created or edited

Auto Set Billing Status Change the billing status to "Paid in full" and "Balance due" when ERA is received
 Change the billing status to "Paid in full" and "Balance due" from billing screen
 Change the billing status to "Paid in full" and "Balance due" when patient's payment is applied
 Change the billing status to when the note is locked and the billing status is blank. Only custom billing statuses are supported.

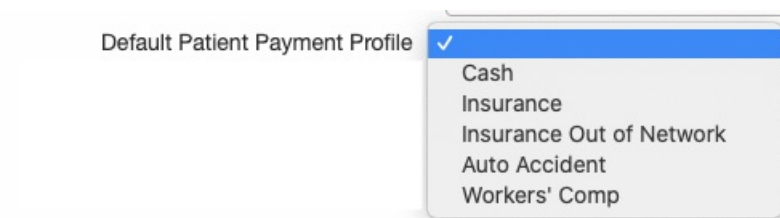
Balance Writeoff Auto-write-off patient balance when claim is changed to "Settled"
 Auto-write-off insurance balance when claim is changed to "Settled"

Default Patient Payment Profile

Hours worked per week, for utilization analysis

Include patient problems in clinical note

4. Click on the drop-down and select the desired payment profile. Available choices include Cash, Insurance, Insurance Out of Network, Auto Accident, and Workers' Comp.



5. Once selected, click on **Update Entire Profile**.

Default Patient Payment Profile

Hours worked per week, for utilization analysis

Include patient problems in clinical note

Search Enrolled Payers First Prioritize enrolled payers in insurance section of patient demographics.

EDI export sender ID Sender ID

EDI export receiver ID Receiver ID

EDI export receiver organization name

Auto-populate claims with referring/ordering provider if blank

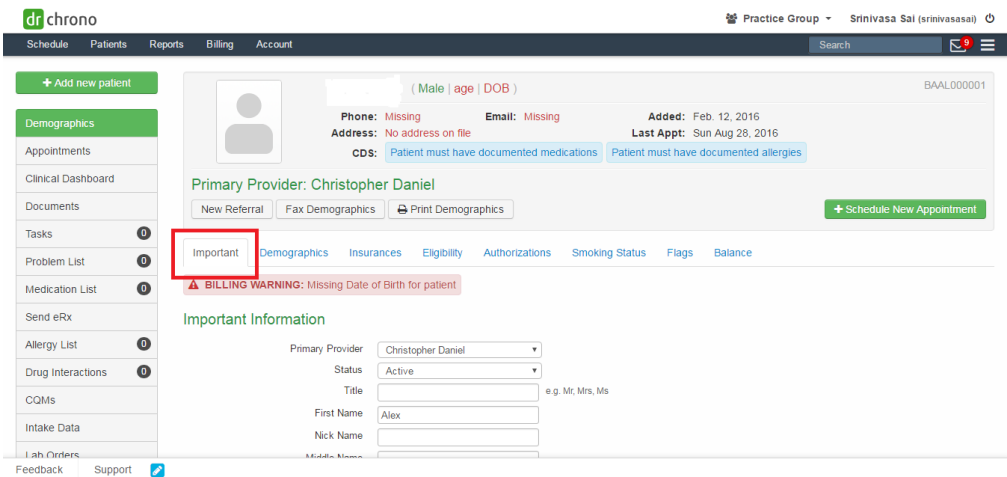
Update Entire Profile

A Single Patient

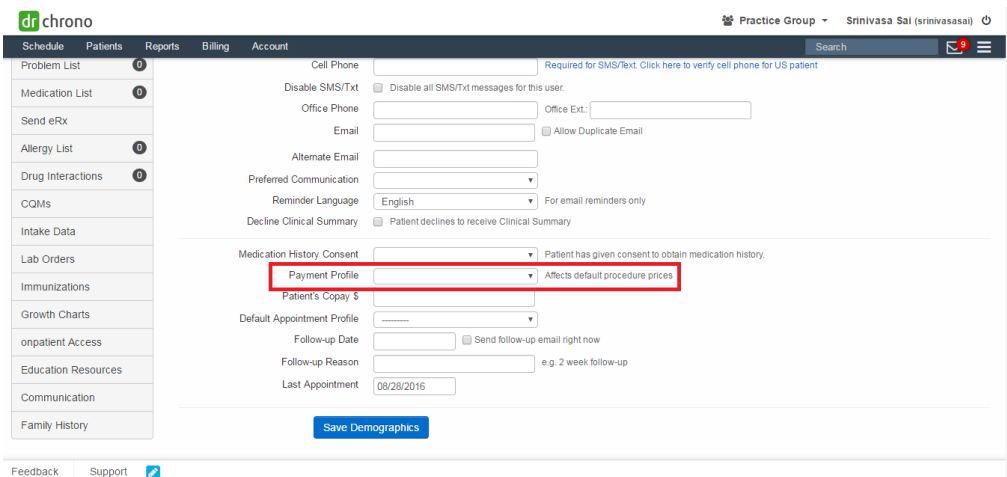
Now, let us see how to set the default payment profile for a single patient.

1. Open the patient demographics for whom you would like to set the default payment profile.

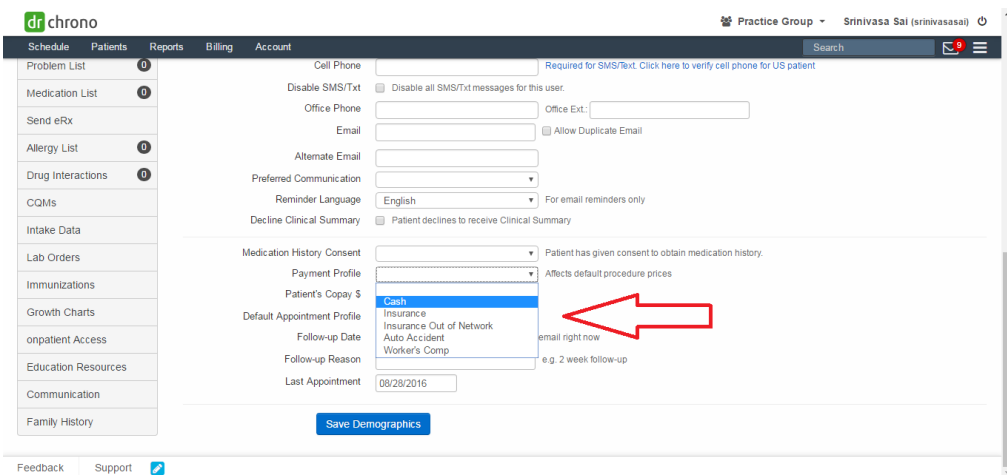
2. Click on the **Important** tab.



3. Please scroll down and find the **Payment Profile**. It is in the last section of the options, just above the blue Save Demographics button.



4. Click on the drop-down and select the default payment profile.



5. Once selected, click on **Save Demographics**.

- Problem List
- Medication List
- Send eRx
- Allergy List
- Drug Interactions
- CQMs
- Intake Data
- Lab Orders
- Immunizations
- Growth Charts
- onpatient Access
- Education Resources
- Communication
- Family History

Cell Phone Required for SMS/Text. Click here to verify cell phone for US patient

Disable SMS/Text Disable all SMS/Text messages for this user.

Office Phone Office Ext.

Email Allow Duplicate Email

Alternate Email

Preferred Communication

Reminder Language For email reminders only

Decline Clinical Summary Patient declines to receive Clinical Summary

Medication History Consent Patient has given consent to obtain medication history.

Payment Profile Affects default procedure prices

Patient's Copay \$

Default Appointment Profile

Follow-up Date Send follow-up email right now

Follow-up Reason e.g. 2 week follow-up

Last Appointment

Save Demographics