# How Do I Update the Default Payment Profile?

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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.

Account	Marketplac
User Set	
Provider	r Settings
onpatier	nt Settings
Account	t Setup
Custom	Fields
2. Click oi	n the <b>Medical</b>

Accou	int Se	etting	S							
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	Auto 🗸	The default icd version (icd-9 or icd-10) for new created appointment
Copying billing respects provider	Copy Last Billing" in billing profiles of	tropdown 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 profile attached).	last appointment when scheduling a new professional appointment (won't take effect when new appointment is having billing
Copy Dx From Pt's Last Appt	Auto copy diagnosis from Patient's la	ast appointment when scheduling a new professional appointment.
Copy Dx From Pt's Problem List	Auto copy diagnosis from patient pro Appointment is checked).	blem list when scheduling a new professional appointment (won't take effect when Copy Diagnosis From Patient's Last
Auto Set Problems	Automatically adds ICD10 codes to p	atients problem list when appointment is created or edited
Auto Set Billing Status	Change the billing status to "Paid in f	ull" and "Balance due" when ERA is received
	Change the billing status to "Paid in f	ull" and "Balance due" from billing screen
	Change the billing status to "Paid in f	ull" and "Balance due" when patient's payment is applied
	Change the billing status to supported.	$\checkmark$ when the note is locked and the billing status is blank. Only custom billing statuses are
Balance Writeoff	Write off as Provider Discount 🗸	Auto-write-off patient balance when claim is changed to "Settled"
	Do not auto write off 🗸 🗸	Auto-write-off insurance balance when claim is changed to "Settled"
Default Patient Payment Profile	~	
Hours worked per week, for utilization analysis	40	
Include patient problems in clinical		

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.

	-
Default Patient Payment Profile	V
	Cash
	Insurance
	Insurance Out of Network
	Auto Accident
	Workers' Comp

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

Default Patient Payment Profile	Insurance v	
Hours worked per week, for utilization analysis		]
Include patient problems in clinical note		
Search Enrolled Payers First	Prioritize enrolled payers in insurance	e 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.

Schedule Patients Re	ports Billing Account	Search 💽 🛃
+ Add new patient	(Male   age   DOB )	BAAL000001
Demographics	Phone: Missing Email: Missing Added: Feb. 12, 2016 Address: No address on file Last Appt: Sun Aug 28, 2016	
Appointments	CDS: Patient must have documented medications Patient must have documented allergies	
Clinical Dashboard	Primary Provider: Christopher Daniel	
Documents	New Referral Fax Demographics	+ Schedule New Appointment
•	Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance	
	Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance	
Problem List	Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance A BILLING WARNING: Missing Date of Birth for patient	
Problem List 0 Medication List 0		
Problem List  O Medication List O Send eRx	BILLING WARNING: Missing Date of Birth for patient	
Problem List 0 Medication List 0 Send eRx	BILLING WARNING: Missing Date of Birth for patient Important Information	
Problem List  O Medication List O Send eRx Allergy List O	BILLING WARNING: Missing Date of Birth for patient Important Information Primary Provider Christopher Daniel	
Problem List   Medication List  Send eRx  Allergy List  Drug Interactions  O	BILLING WARNING: Missing Date of Birth for patient Important Information Primary Provider Christopher Daniel      Status Active	

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.

dr chrono				管 Practice Group マ Srinivasa Sal (srinivasasai) 也
Schedule Pa	ients Ro	eports Billir	ng Account	Search 😒 🚍
Problem List	0		Cell Phone	Required for SMS/Text. Click here to verify cell phone for US patient
Medication List	0		Disable SMS/Txt	Disable all SMS/Txt messages for this user.
Send eRx			Office Phone	Office Ext.:
Senu erx			Email	Allow Duplicate Email
Allergy List	0		Alternate Email	
Drug Interactions	0		Preferred Communication	
CQMs			Reminder Language	English The remail reminders only
Intake Data			Decline Clinical Summary	Patient declines to receive Clinical Summary
Lab Orders			Medication History Consent	Patient has given consent to obtain medication history.
Immunizations			Payment Profile	Affects default procedure prices
			Patient's Copay \$	
Growth Charts			Default Appointment Profile	¥
onpatient Access			Follow-up Date	Send follow-up email right now
Education Resou	rces		Follow-up Reason	e.g. 2 week follow-up
Ormania			Last Appointment	08/28/2016
Communication				
Family History			Save Der	nographics
Feedback St	ipport 🛛 🛃			

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

Schedule Patients Repo	rts Billing Account	Search 🚬 🔁
Problem List 🛛 🕕	Cell Phone	Required for SMS/Text. Click here to verify cell phone for US patient
Medication List	Disable SMS/Txt	Disable all SMS/Txt messages for this user.
Send eRx	Office Phone	Office Ext:
	Email	Allow Duplicate Email
Allergy List	Alternate Email	
Drug Interactions	Preferred Communication	Y
CQMs	Reminder Language	English    For email reminders only
Intake Data	Decline Clinical Summary	Patient declines to receive Clinical Summary
.ab Orders	Medication History Consent	Patient has given consent to obtain medication history.
Immunizations	Payment Profile	Affects default procedure prices
	Patient's Copay \$	Cash
Growth Charts	Default Appointment Profile	Insurance Insurance Out of Network
onpatient Access	Follow-up Date	Auto Accident email right now Worker's Comp
Education Resources	Follow-up Reason	e.g. 2 week follow-up
Communication	Last Appointment	08/28/2016
Family History	Save Der	nographics

5. Once selected, click on Save Demographics.

Schedule Patients Re	eports Billing Account	Search 🔁 🔁
Problem List 🛛 🕕	Cell Phone	Required for SMS/Text. Click here to verify cell phone for US patient
Medication List	Disable SMS/Txt	Disable all SMS/Txt messages for this user.
-	Office Phone	Office Ext:
Send eRx	Email	Allow Duplicate Email
Allergy List	Alternate Email	
Drug Interactions	Preferred Communication	
CQMs	Reminder Language	English   For email reminders only
ntake Data	Decline Clinical Summary	Patient declines to receive Clinical Summary
.ab Orders	Medication History Consent	Patient has given consent to obtain medication history.
mmunizations	Payment Profile	Cash  v Affects default procedure prices
	Patient's Copay \$	
Growth Charts	Default Appointment Profile	
onpatient Access	Follow-up Date	Send follow-up email right now
Education Resources	Follow-up Reason	e.g. 2 week follow-up
Communication	Last Appointment	08/28/2016
Family History	Save Det	mographics