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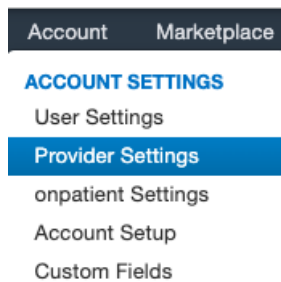
2. Click on the **Medical Billing** tab.

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

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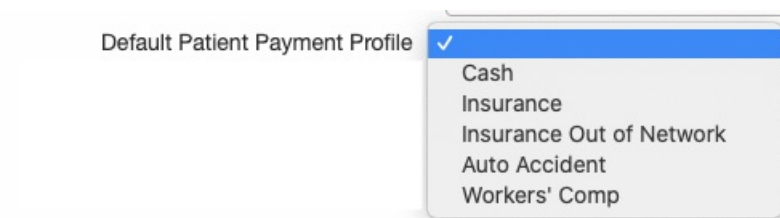
5. Once selected, click on **Update Entire Profile**.

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.
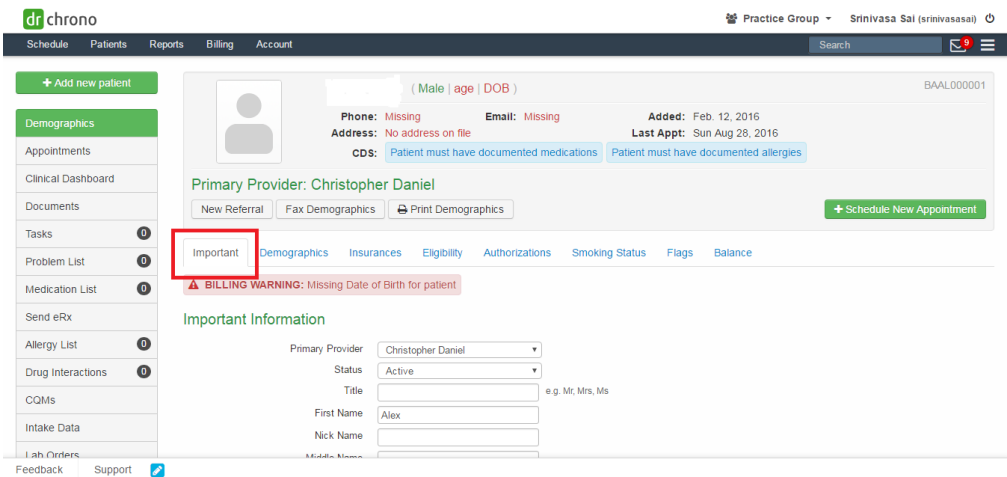
3. Please scroll down and find the **Payment Profile**. It is in the last section of the options, just above the blue Save Demographics button.
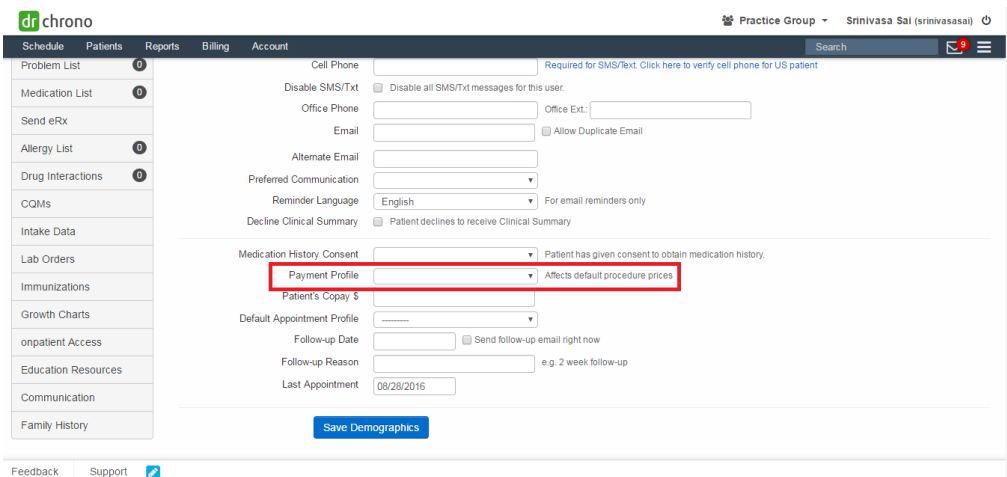
4. Click on the drop-down and select the default payment profile.

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

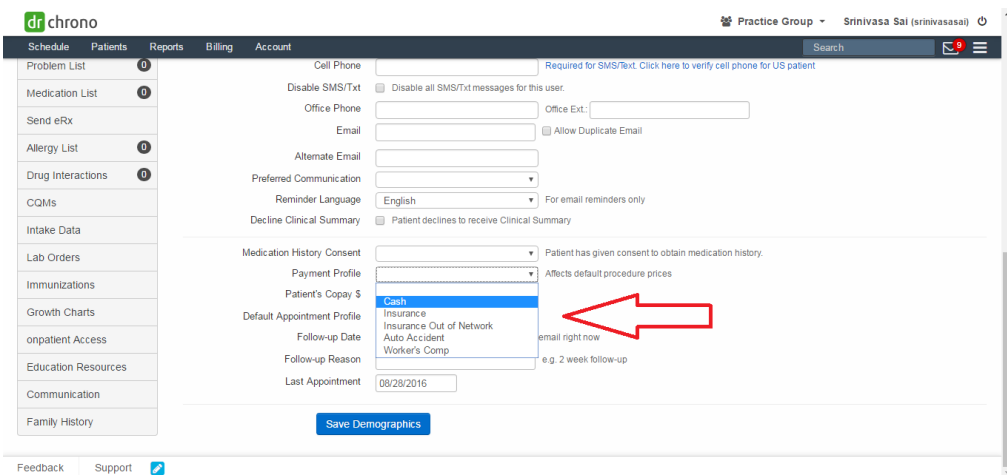|		
Problem List	**0**	Cell Phone		Required for SMS/Text. Click here to verify cell phone for US patient
Medication List	**0**	Disable SMS/Txt	☐ Disable all SMS/Txt messages for this user.
Send eRx		Office Phone		Office Ext.:
Allergy List	**0**	Email		☐ Allow Duplicate Email
Drug Interactions	**0**	Alternate Email	
CQMs		Preferred Communication	▾
Intake Data		Reminder Language	English ▾ For email reminders only
Lab Orders		Decline Clinical Summary	☐ Patient declines to receive Clinical Summary
Immunizations		Medication History Consent	▾ Patient has given consent to obtain medication history.
Growth Charts		Payment Profile	Cash ▾ Affects default procedure prices
onpatient Access		Patient's Copay $	
Education Resources		Default Appointment Profile	---------- ▾
Communication		Follow-up Date	☐ Send follow-up email right now
Family History		Follow-up Reason	e.g. 2 week follow-up
		Last Appointment	08/28/2016

Save Demographics