How to change the billing status automatically to Paid in full and Balance due from the billing screen?

07/24/2024 5:05 pm EDT

Enabling **Auto set Billing status** will help your office change the billing status automatically when payments post that satisfy or zeroes out the insurance or patient balance on the account. It will help you to properly categorize claims that are paid in full, without the manual mouse clicks.

The Billing status will change to *Paid in full* or *Balance due* according to the transactions posted on the claim and if the patient has paid any responsibility upfront.

To enable the settings, follow the steps below:

1. Hover over the **Account** tab and select **Provider Settings.**
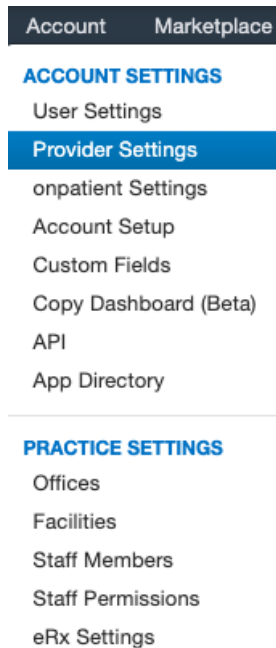
2. On this page, select the **Medical Billing** tab from the headers.

Account Settings

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

Medical Billing

Default Billing Provider	---------	
Billing NPI	1234567890	Required for eRx & billing. Group NPI can be same as rendering NPI #
Rendering Provider NPI	5555555555	Individual Provider NPI #. Leave blank if the same as billing NPI
Practice Official Name	Dr. Nick's Walk-In Clinic	
Practice Tax ID	123456789	
CLIA Number	25D2162109	Optional: For CLIA certified labs
CLIA # Expiration	01/15/2021	Optional: Expiration date of CLIA #
Billing Taxonomy Code	208D00000X	Optional: Leave blank to let the system choose
Rendering Taxonomy Code	208D00000X	Optional: Leave blank to let the system choose
Individual Medicare PTAN		
Group Medicare PTAN		
Individual BCBS Number		
Group BCBS Number		

3. Please scroll down to the **Miscellaneous** section. In this section, you will see three checkboxes for **Auto Set Billing Status**. Select the second check box, this will automatically set the billing status of your claims when the insurance and patient payments are posted manually in the billing details screen.

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.

Select the ones that you require and click on **Update Entire Profile** to save the changes.