

# Payment Profile for Cash Appointments

Last modified on 03/19/2026 2:29 pm EDT

For services where the patient is paying cash, the payment profile must be set to cash. This will allow a patient statement to be printed (if needed), claim to be settled and showing a zero balance due after the payment is posted.

## Patient Appointment View

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Institutional Claim Patient SuperBill Clinical Note Billing Details Other Forms ▾

**Billing Status** Balance Due ▾

ICD Version ICD-10 ▾

Primary Insurer - Default - ▾

Secondary Insurer - Default - ▾

Patient Payment \$ 0  +

Pre Authorization Approval

Referral #

**Payment Profile** Cash ▾

Billing Profile ▾ +

Billing Pick List Choose Codes from Pick List

Diagnosis Pick List Choose Codes from Pt Problems

**HCFA Box 10 - Is patient's condition related to:**

Employment No ▾

Auto Accident No ▾

Other Accident No ▾

Onset Date Type Onset of Current Symptoms ▾

Onset Date

Other Date Type - Other Date Type - ▾

Other Date

**Hospitalization Info**

Admission Date

Discharge Date

Start Care/Strm Covers Start 04/19/2022

End Care/Strm Covers End 04/19/2022

**ICD-10 Codes** Find Diagnosis codes ▾

#	Code	Description
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**CPT Codes** Find CPT Procedure codes ▾

Code	Description	Price (\$)
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**ICD-9 Codes to Convert** Find Diagnosis codes ▾

#	Code	Description
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**HCPCS Codes** Find HCPCS Procedure codes ▾

Code	Description	Price (\$)
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**NDC Codes** Find NDC Codes ▾

NDC Code	Quantity	Units	Line Item
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**Custom Codes** Find Custom Procedure codes ▾

Code	Description	Price (\$)
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Include note in EDI Billing:

## Live Claims Feed View

**Billing Status** Bill Insurance ▾

ICD Version ICD-10 ▾

Primary Insurer - Default - ▾

Secondary Insurer - Default - ▾

Billing Provider: - If different to provider - ▾

Supervising Provider: - If different to provider - ▾

Pt Payment \$ 0  +

**Payment Profile** Cash ▾

Pt Payment Due

### Payment Profile Cash:

- Charges appear under "Pt Bal"

Ins Bal	Pt Bal
\$0.00	\$100.00
\$0.00	\$100.00

If the payment profile is set to any other option (insurance, insurance out of network, auto accident, workers' comp), the balance due will appear under "Ins Bal" in the Live Claims Feed, instead of appearing under "Pt Bal" as it should. If that happens, changing the payment profile to cash will correct it and have it appear under "Pt Bal".

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