

Payment Profile for Cash Appointments

07/08/2024 7:24 pm EDT

For services where the patient is paying cash, it is important that the payment profile 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/Stm Covers Start 04/19/2022

End Care/Stm Covers End 04/19/2022

ICD-10 Codes ▾

#	Code	Description
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CPT Codes ▾

Code	Description	Price (\$)
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ICD-9 Codes to Convert ▾

#	Code	Description
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HCPCS Codes ▾

Code	Description	Price (\$)
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NDC Codes ▾

NDC Code	Quantity	Units	Line Item
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Custom 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".