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

Last modified on 01/16/2026 2:58 pm EST

Auto Set Billing Status

Enabling **Auto Set Billing status** will help your office change the billing status automatically when payments post that satisfy or zero 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. Select the **Medical Billing** tab from the headers.

3. Scroll down to the Miscellaneous section. Here 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.

4. Select the ones that you require.

5. Press **Update Entire Profile** to save the changes.