

How Do I Update the Default Payment Profile?

Last modified on 11/18/2024 9:43 am EST

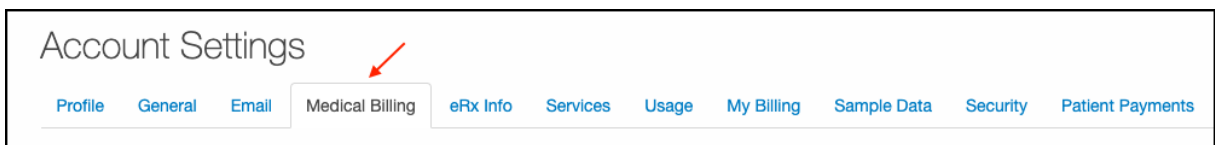
There are two ways of setting a default payment profile.

1. Set the default payment profile in general for all patients.
2. Set the default payment profile for a particular patient.

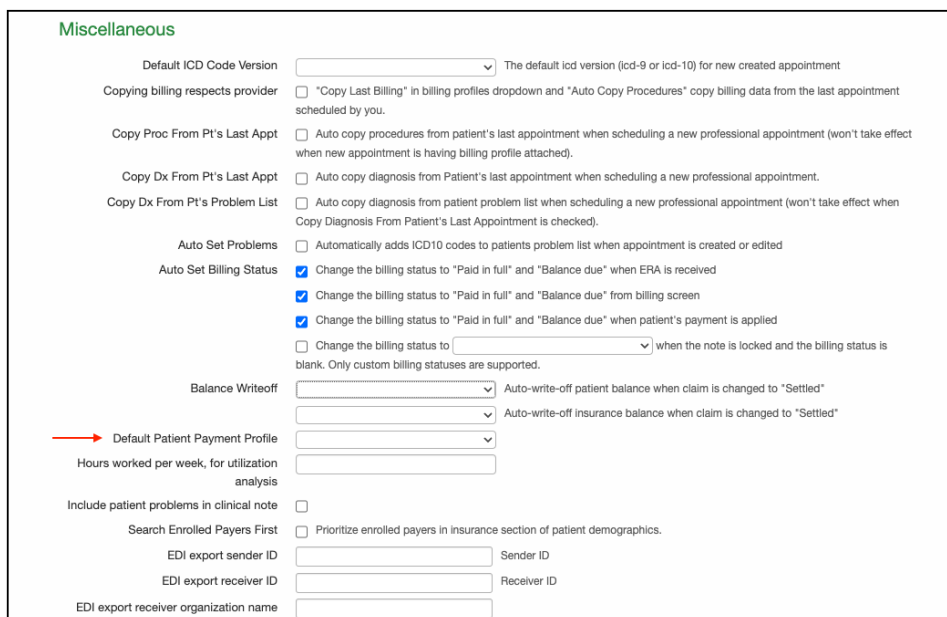
All Patients

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. Select the **MedicalBilling** tab.



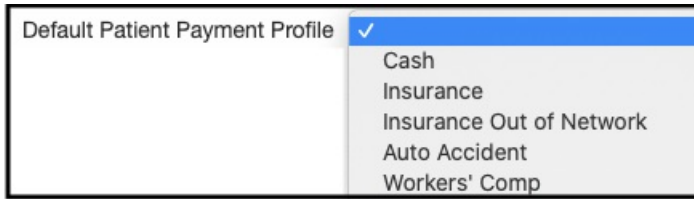
3. Under the **Miscellaneous** heading, look for **Default Patient Payment Profile**.

A screenshot of the 'Miscellaneous' settings page. The 'Default Patient Payment Profile' field is highlighted with a red arrow. The page contains various settings such as 'Default ICD Code Version', 'Copying billing respects provider', 'Copy Proc From Pt's Last Appt', 'Copy Dx From Pt's Last Appt', 'Copy Dx From Pt's Problem List', 'Auto Set Problems', 'Auto Set Billing Status', 'Balance Writeoff', 'Hours worked per week, for utilization analysis', 'Include patient problems in clinical note', 'Search Enrolled Payers First', 'EDI export sender ID', 'EDI export receiver ID', and 'EDI export receiver organization name'.

4. Select the drop-down and select the desired payment profile. Available choices include Cash, Insurance,

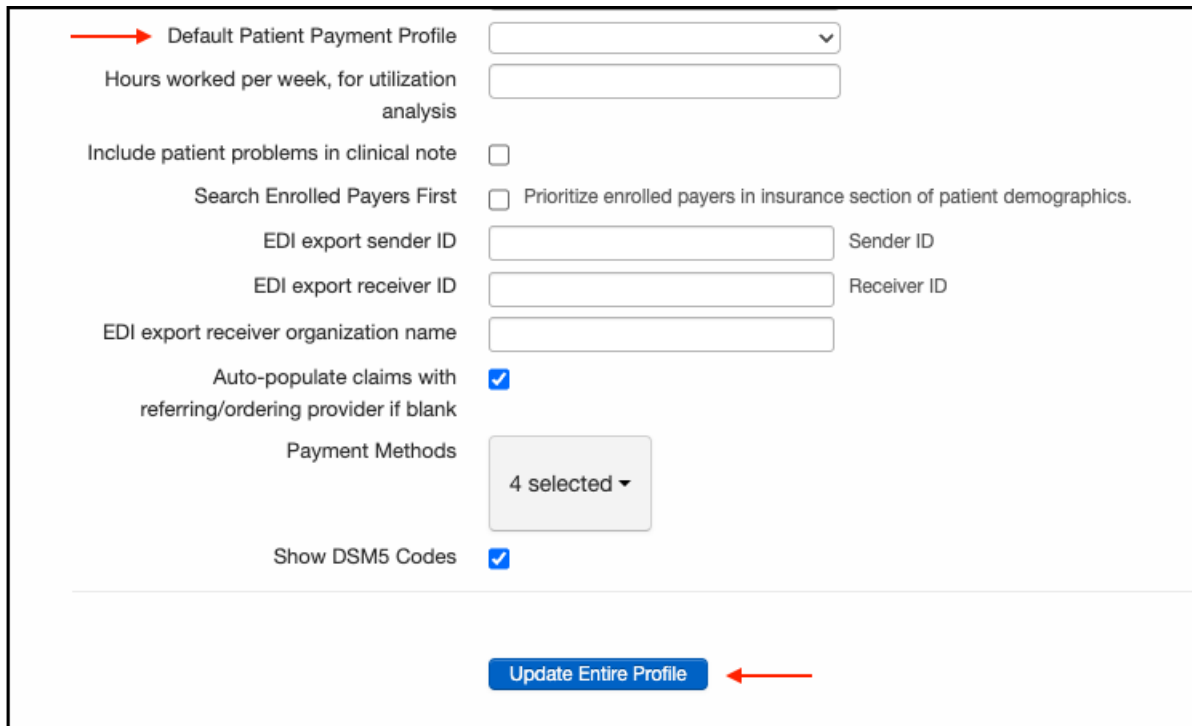
Insurance Out of Network, Auto

Accident, and Workers' Comp.



A screenshot of a dropdown menu. The menu is open, showing a list of options: 'Cash', 'Insurance', 'Insurance Out of Network', 'Auto Accident', and 'Workers' Comp'. The top option, 'Default Patient Payment Profile', is highlighted in blue and has a checkmark next to it. The other options are in a light gray background.

5. Select **Update Entire Profile**.



A screenshot of a form for updating a patient profile. The form contains several fields and checkboxes. A red arrow points to the 'Default Patient Payment Profile' dropdown menu. Below the form, a blue button labeled 'Update Entire Profile' has a red arrow pointing to it from the right.

Default Patient Payment Profile

Hours worked per week, for utilization analysis

Include patient problems in clinical note

Search Enrolled Payers First Prioritize enrolled payers in insurance section of patient demographics.

EDI export sender ID Sender ID

EDI export receiver ID Receiver ID

EDI export receiver organization name

Auto-populate claims with referring/ordering provider if blank

Payment Methods

Show DSM5 Codes

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. Select the **Important** tab.

Demographics

✓ Sufficient patient demographics to bill insurance.

[Important](#)
[Demographics](#)
[Insurances](#)
[Authorizations](#)
[Smoking Status](#)
[Flags](#)

Important Information

Primary Provider

 Status

 Title e.g. Mr, Mrs, Ms

 First Name

 Nick Name

 Middle Name

 Last Name


 Previous/Birth Name

 Suffix e.g. I, II, III, IV, Jr, Sr

 Demographics History Add name changes to demographics history

3. Scroll down and find the **Payment Profile**. It is in the last section of the options, just above the blue Save Demographics button.

Medication History Consent Patient has given consent to obtain medication history.

 Payment Profile Affects default procedure prices

 Patient's Copay \$

 Default Appointment Profile

 Follow-up Date Patient will get reminders around this date to make an appointment.

 Follow-up Reason e.g. 2 week follow-up

 Last Appointment

[Save Demographics](#)

4. Select the drop-down menu and set the default payment profile.

Medication History Consent Patient has given consent to obtain medication history.

→ Payment Profile

- Cash
- Insurance
- Insurance Out of Network
- Auto Accident
- Worker's Comp (no data entered)

Patient's Copay \$

Default Appointment Profile

Follow-up Date Patient will get reminders around this date to make an appointment.

Follow-up Reason e.g. 2 week follow-up

Last Appointment

5. Once selected, press **Save Demographics**.

Follow-up Reason e.g. 2 week follow-up

Last Appointment

Save Demographics ←