How Do I Update the Default Payment Profile?

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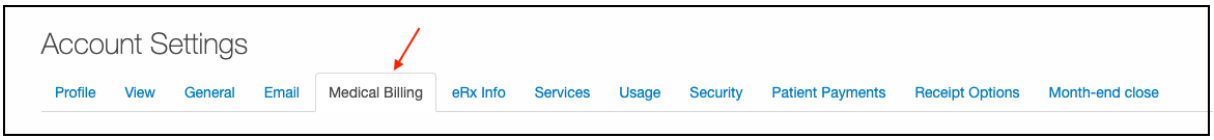
There are two ways of setting a default payment profile.

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

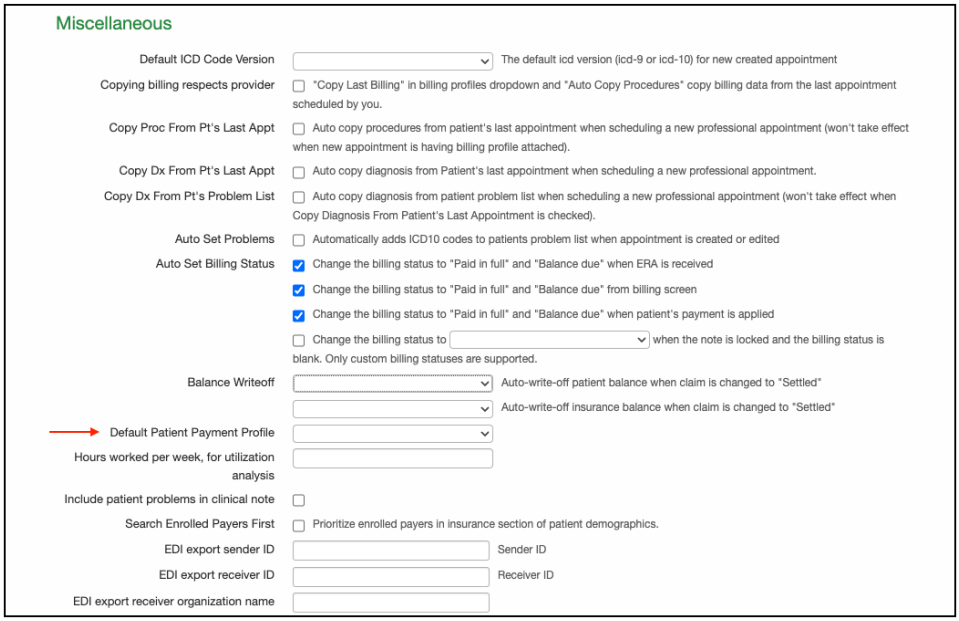
All Patients

First, let us see how to set the default payment profile in general for **all** of your patients:

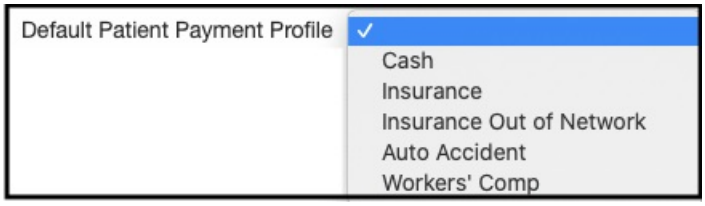
1. Hover the cursor over the **Account** tab and select **Provider Settings**.
2. Select the **Medical Billing** tab.



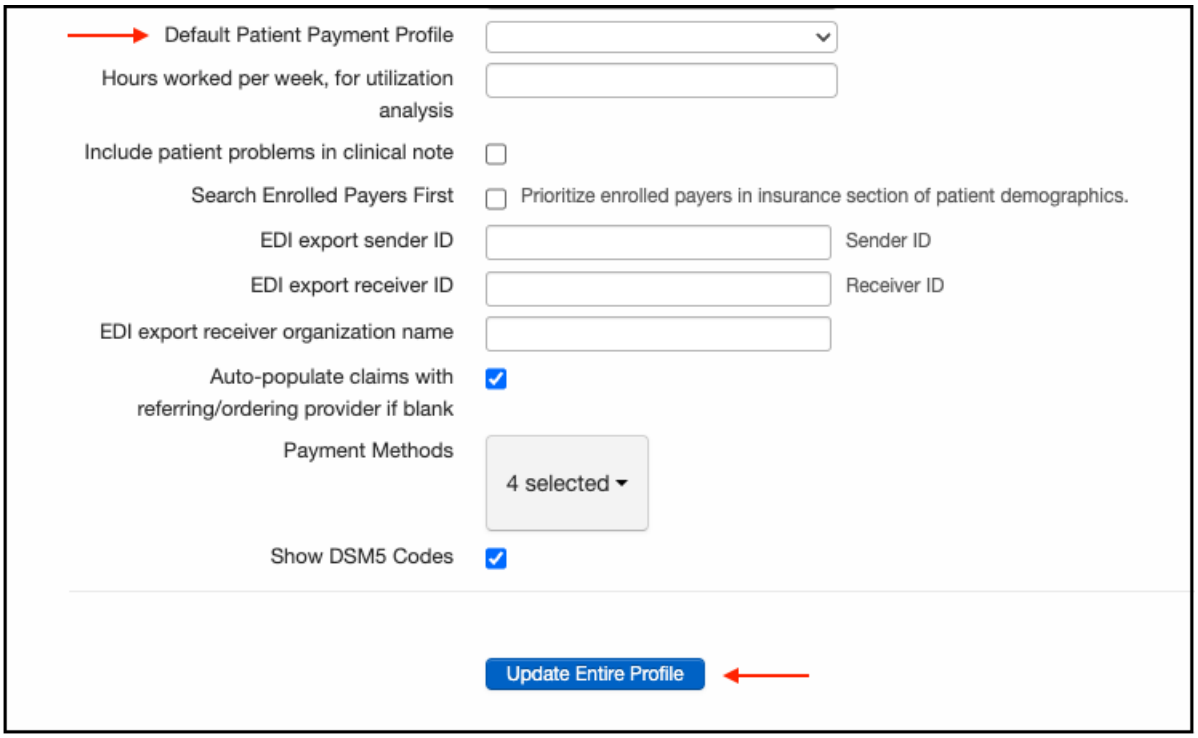
3. Under the **Miscellaneous** heading, look for **Default Patient Payment Profile.**



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.



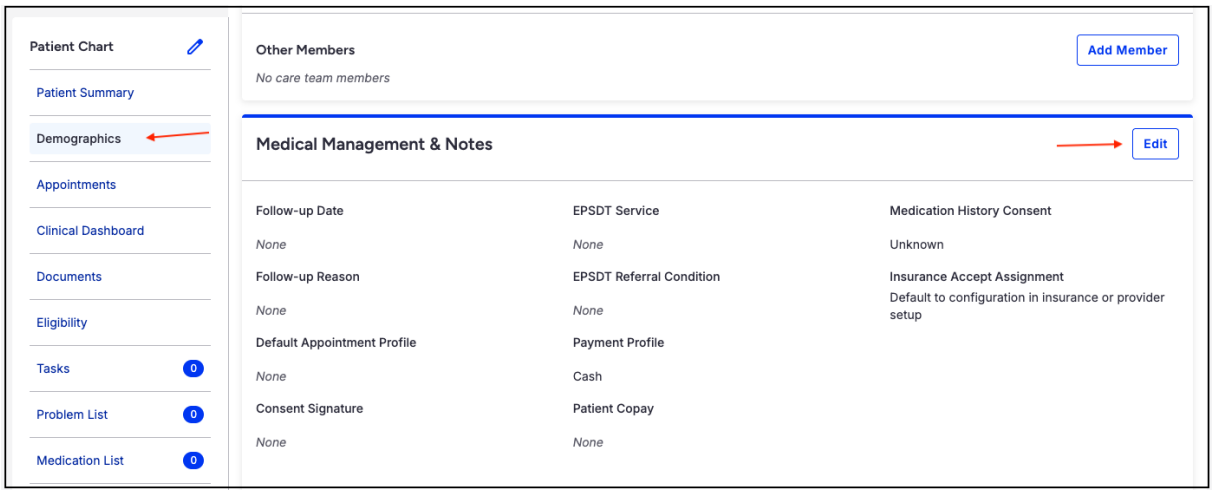
5. Select **Update Entire Profile**.



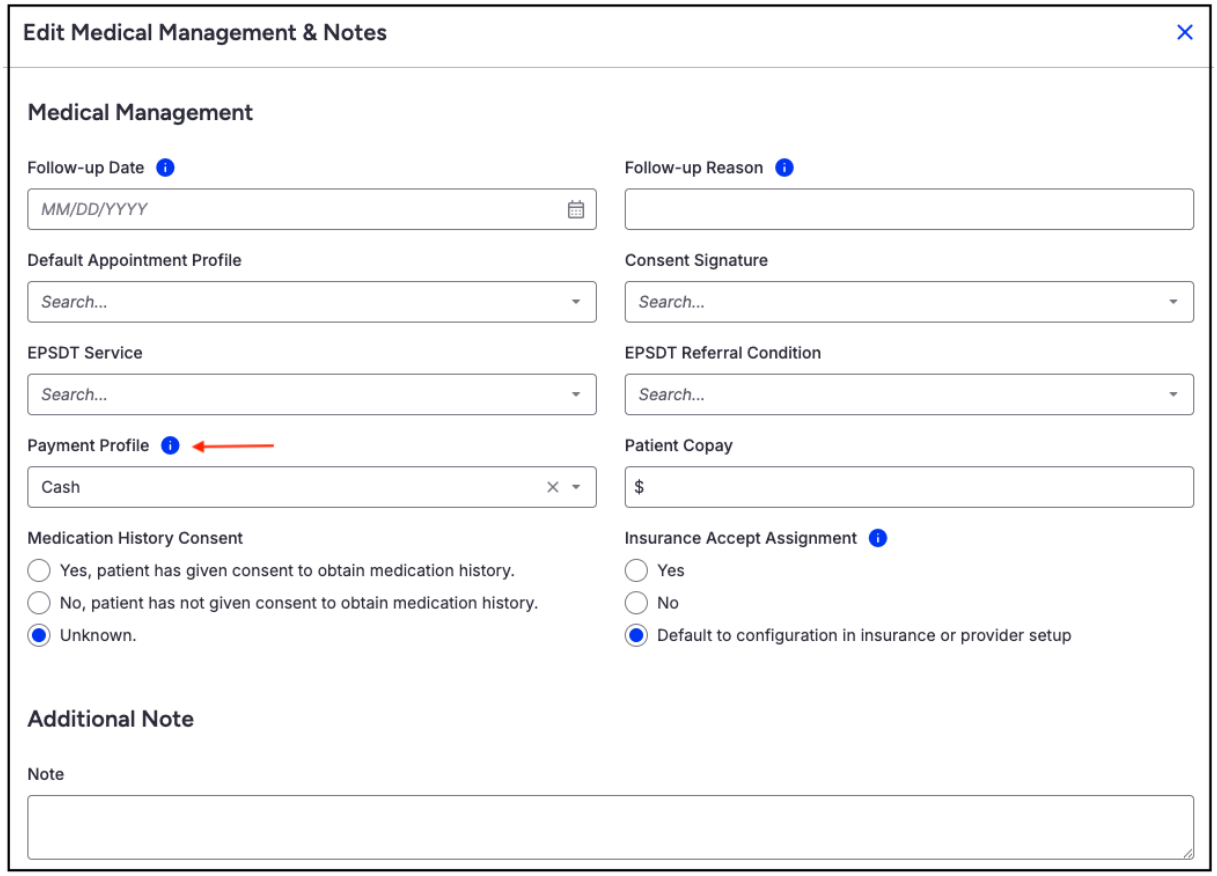
A Single Patient

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 **Demographics** tab and scroll down to **Medical Management & Notes**. Select **Edit**.



3. Scroll down to **Payment Profile**.



4. Once selected, press **Save**.

