

How Do I Update the Default Payment Profile?

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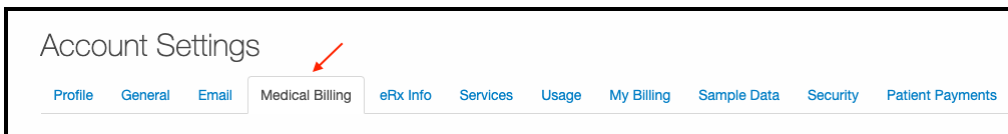
There are two ways of setting a default payment profile.

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

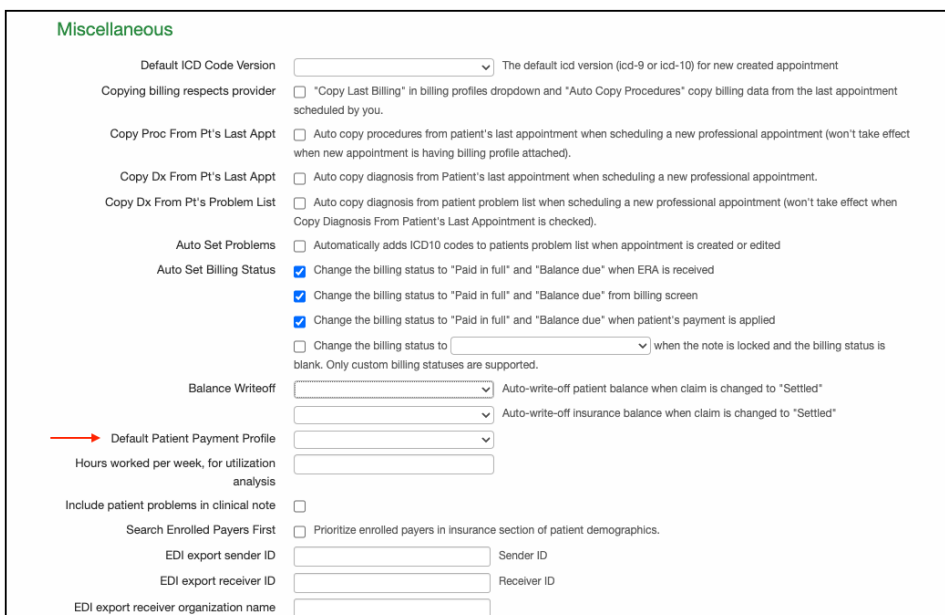
All Patients

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

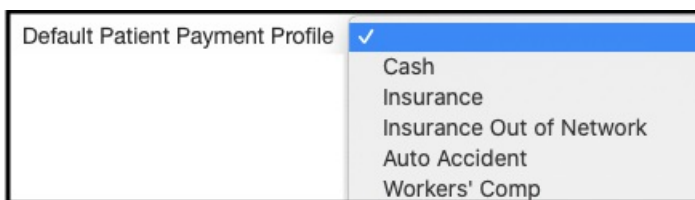
1. Hover the cursor on the **Account** tab and select **Provider Settings**.
2. Select the **Medical Billing** tab.



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

A screenshot of the 'Miscellaneous' settings section in a software interface. The section title 'Miscellaneous' is in green. Below the title are various configuration options. A red arrow points to the 'Default Patient Payment Profile' dropdown menu. Other options include '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'. Each option has a corresponding input field, checkbox, or dropdown menu.

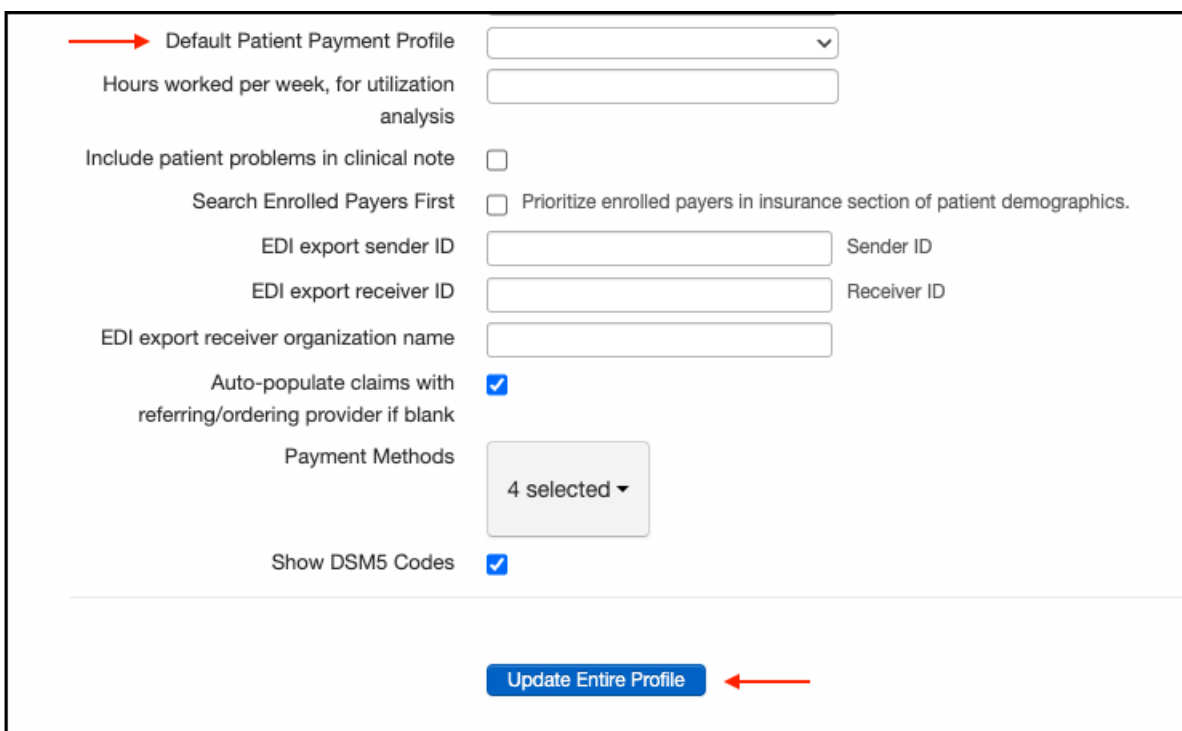
4. Click on the drop-down and select the desired payment profile. Available choices include Cash, Insurance, Insurance Out of Network, Auto Accident, and Workers' Comp.



Default Patient Payment Profile

- ✓ Cash
- Insurance
- Insurance Out of Network
- Auto Accident
- Workers' Comp

5. Select **Update Entire Profile**.



Default Patient Payment Profile

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

EDI export receiver organization name

Auto-populate claims with referring/ordering provider if blank

Payment Methods

Show DSM5 Codes

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 **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 ←