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 MedicalBilling tab.

Acco	ount Se	etting	s 🖌							
Profile	General	Email	Medical Billing	eRx Info	Services	Usage	My Billing	Sample Data	Security	Patient Payments

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

Miscellaneous				
Default ICD Code Version	The default icd version (icd-9 or icd-10) for new created appointment			
Copying billing respects provider	"Copy Last Billing" in billing profiles dropdown and "Auto Copy Procedures" copy billing data from the last appointment scheduled by you.			
Copy Proc From Pt's Last Appt	Auto copy procedures from patient's last appointment when scheduling a new professional appointment (won't take effect when new appointment is having billing profile attached).			
Copy Dx From Pt's Last Appt	Auto copy diagnosis from Patient's last appointment when scheduling a new professional appointment.			
Copy Dx From Pt's Problem List	Auto copy diagnosis from patient pro Copy Diagnosis From Patient's Last App	blem list when scheduling a new professional appointment (won't take effect when pintment is checked).		
Auto Set Problems	 Automatically adds ICD10 codes to p 	patients problem list when appointment is created or edited		
Auto Set Billing Status	Change the billing status to "Paid in full" and "Balance due" when ERA is received			
	Change the billing status to "Paid in the status"	2 Change the billing status to "Paid in full" and "Balance due" from billing screen		
	Change the billing status to "Paid in full" and "Balance due" when patient's payment is applied			
	Change the billing status to	\checkmark when the note is locked and the billing status is		
	blank. Only custom billing statuses are supported.			
Balance Writeoff	· · · · · · · · · · · · · · · · · · ·	Auto-write-off patient balance when claim is changed to "Settled"		
	×	Auto-write-off insurance balance when claim is changed to "Settled"		
Default Patient Payment Profile	×			
Hours worked per week, for utilization analysis				
Include patient problems in clinical note	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				

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.

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	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	4 selected -
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 patier	nt demographics to bill i	nsurance.				
Important	Demographics	Insurances	Authorizations	s Smoking Status	Flags	
Important Info	rmation					
	Primary Provider		~			
	Status		~			
	Title		e.g. Mr, Mrs,	, Ms		
	First Name					
	Nick Name					
	Middle Name					
	Last Name					
Pre	evious/Birth Name					
	Suffix		e.g. I, II, III, I	V, Jr, Sr		
Dem	ographics History	Add name changes to dem	ographics 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
Patient's Copay \$	Insurance Insurance Out of Network
Default Appointment Profile	Auto Accident
Follow-up Date	Worker's Comp (no data entered)
	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	