# How to auto set a billing status when ERA is received and patient paid the balance in full?

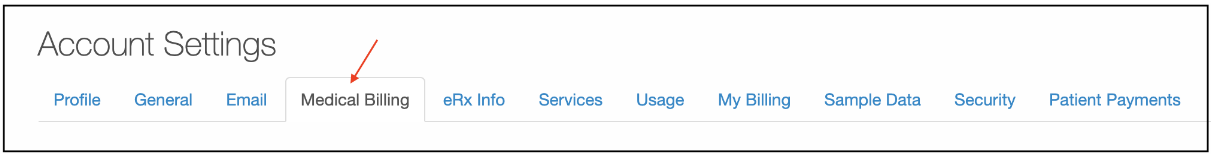
Last modified on 02/18/2025 10:03 am EST

Enabling **Auto Set Billing status** will help your office by updating the billing status automatically when you receive an ERA from a payer.   The Billing status will change to **ERA Received, ERA Denied, Internal Review, Balance Due, or Paid in Full** depending on the information received on the ERA, saving you time and keystrokes.

For manual posting, our system will auto-set the billing status once the transaction(s) is posted and the appointment is saved.

To enable the settings, follow the steps below:

1. Navigate to **Account> Provider Settings**
2. Select the **Medical Billing** tab




3. Scroll down to the **Miscellaneous** section. In this section, you will see three checkboxes for **Auto Set Billing Status**. Select the ones that you require and press **Update Entire Profile** to save the changes.
    a. The first check box will automatically set the billing status of your claims when the account receives and posts an ERA.
    b. The second check box will automatically set the billing status of your claims when the insurance and patient payments are posted manually in the billing details screen.
    c. The third check box will automatically set the billing status of your claims when the patient payment is applied from the patient payments screen.
    d. The fourth check box will automatically set the billing status to a custom billing status you set when the note has been locked and the billing status is blank.  This status would be helpful to alert the biller when a patient's clinical note has been completed and the claim is ready for submission to the payer.