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

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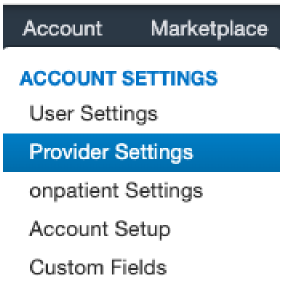
Enabling **Auto set Billing status** will help your office by updating the billing status automatically when you receive an ERA from a payer. The Billing status will change to **ERA Received, ERA Denied, Internal Review, Balance Due, or Paid in Full** depending on the information received on the ERA,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

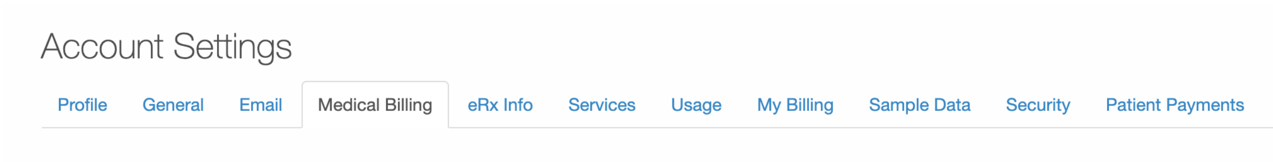
For manual posting, our system will auto-set the billing status once the transaction(s) is posted and the appointment is saved.

To enable the settings, follow the steps below:

1. Hover over the **Account** tab and select Provider Settings:



2. On this page, select the **Medical Billing** tab:



3. Please 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 click on **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 forth 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.

Auto Set Billing Status

- [x] Change the billing status to "Paid in full" and "Balance due" when ERA is received
- [x] Change the billing status to "Paid in full" and "Balance due" from billing screen
- [x] Change the billing status to "Paid in full" and "Balance due" when patient's payment is applied
- [ ] Change the billing status to ______ when the note is locked and the billing status is blank. Only custom billing statuses are supported.