?atient Settings

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;onfigure Patient Settings For Customer

1. Select **Patient > Settings**.
2. Click the **Edit** button.
3. Click the **Copy Settings link** to copy the current settings to another customer associated with your account.
4. **Require Meaningful Use fields to be filled out for a patient record to be considered complete?**
    1. If set to **Yes**, any Meaningful Use fields (race, ethnicity, and language) must be filled out or the patient will be marked as incomplete.
5. **Require Emergency Contact information to be filled out for a patient record to be considered complete?**
    1. If set to **Yes**, the Emergency Contact information fields (name, relationship to patient, and phon‹ number) must be filled out or the patient will be marked as incomplete.
6. **Reset the Statements Sent counter when a new claim is set to Balance Due Patient?**
    1. If set to **Yes**, it will reset the patient's "*Statements Sent*" counter to 0 when a claim is changed fror another status to "Balance Due Patient" for the first time. This ensures that all claims will receiv the maximum number of statements.
7. Click **Save**.

;onfigure Patient Settings for User

1. Select **Patient > Settings**.
2. Click the **Edit** button.
3. Click the **Copy Settings link** to copy the current settings to another customer associated with your account.
4. **Show warning when saving a new patient that is a duplicate of an already entered patient based on the SSN or Last Name, First Name, and Date of Birth?**
    1. If set to **Yes**, a warning will pop up if you are creating a duplicate patient based on the SSN, Last Name, First Name or Date of Birth.

5. **When creating a new patient, default the provider to:**
    1. Use the to select the default provider new patients will be associated to.
6. **When creating a new patient, default the state within the patient's address to:**
    1. Use the **State field**, to default the patient state when creating new patients.
7. **When inactivating a patient record that currently has a non-zero balance:**
    1. Use the drop-down menu, to determine the action that happens when deactivating a patient record that has a non-zero balance (e.g., patient John Doe owes $300) You can choose one of the following actions:
        - Save the patient as inactive without a confirmation/alert
        - Show a confirmation before saving the patient as inactive
        - Show an alert and do not allow the patient to be saved as inactive
8. **Show a prompt to update the patient account type to "Payment Plan" (if not already set) whenever creating a new Payment Plan?**
    1. If set to **Yes**, a prompt to automatically update the “Patient Type” to “Payment Plan” will appear when creating a new payment plan for a patient.
9. **Show an alert when opening patient records for patients older than 65?**
    1. If set to **Yes**, an alert will pop up when opening a patient record for patients older than 65.
10. **Display an option in the Patient screen to copy the patient's default Facility as their primary address? (This can be useful for practices that work directly with nursing homes and other residential treatment facilities.)**
    1. If set to **Yes**, you will have access to an option to copy the patient’s default facility as their primary address
11. **Show whether a claim is professional or institutional in the Patient Activity?**
    1. If set to **Yes**, it will display whether the claim is professional or institutional by adding either a (Prof.) or (Inst.) label after the claim number in the Claim Activity window.
12. **Show the Net Amount and balance (based on the allowed or contracted amount) in Patient Activity**
    1. If set to **Yes**, it will display a Net Amount column in the Claim Activity window, as well as replace the Balance column for a Net Balance Column.
13. **Set margins to use when printing the addresses on the Enhanced Statement payment slip.**
    1. Use the arrows to set the margins to use for the patient address and the return address labels when printing the **Enhanced User Print Statement**.

> Any changes to these margins will only adjust the position of the return address or the patient address on the enhanced user printed statement.

14. Click **Save**.