

# Configure Payment Settings for User

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## Who Can Use This Feature?

Users with access permission for Payments can edit Payment Settings for their User.

1. Select **Payment > Settings**.
2. Click the **Edit** button.
3. Click the **Copy Settings link** to copy the current settings to another customer associated with your account.
  1. **Show a warning when posting a new insurance check that is a duplicate of an already entered check based on the payer, check date and check #?**
    1. If set to **Yes**, a warning will appear if you are posting a duplicate insurance check based on the payer, check date and check #.
  2. **Print the provider's Tax ID # on patient payment receipts?**
    1. If set to **Yes**, the providers Tax ID # will print on your payment receipts.
  3. **Keep the received/check date the same between insurance payments?**
    1. If set to **Yes**, the received and check date will stay the same between insurance payments. This may be used to default a specific date when posting multiple insurance payments from the same date.
  4. **Keep the received/check date the same between patient payments?**
    1. If set to **Yes**, the received and check date will stay the same between patient payments. This may be used to default a specific date when posting multiple patient payments from the same date.
5. Choose a **Merchant Account** from the drop-down menu
  1. Select whether you want to **receive a warning when no card number is entered**
6. **When posting patient payments, default the payment type field to:**
  1. **No default selection** is selected, no payment type selection will populate when posting a patient payment.
  2. **Copay** is selected, the "copay" payment type will populate when posting a patient payment.

3. **Payment** is selected, the "payment" payment type will populate when posting a patient payment.

**7. Add patient to the recently opened list when adding claims to insurance checks?**

1. If set to **Yes**, the patients "*recently opened list*" will be updated when adding a new claim to an insurance payment.

**8. Change the payment source to Check on new payments when a check number is entered?**

1. If set to **Yes**, the payment source will default to "Check" whenever text is entered into the **Check #** field.

**9. Automatically post Interest amounts as payments, which will reduce the claim balance owed to subsequent payers and to the patient?**

1. If set to **Yes**, Any interest amounts linked to claims will be applied to the claim as a payment (must be equal to or less than the balance itself).

**10. Show a confirmation before sending a receipt via email or SMS Text?**

1. If set to **Yes**, a confirmation pop-up will be shown before a receipt is sent via SMS or email.

4. Click **Save**.

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