ᑭayment Defaults

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ayment Defaults contain options that will automatically be set when sanding patient payment eceipts. They can be changed at any time to determine if you want to allow email, text, or printed receipts, s well as what to include on them.

ollow the steps below to set your Patient Defaults for a specific office.

1. Select **Customer Setup** > **Practices**.
2. Use the **Show All** button to view all practices. Or use the **Search field** to further drill down your search
3. Select the **Practice.**
4. Locate and click on the **Options tab** from the right-hand side panel.
5. Click the **Payment tab.**
6. Make your selections referencing the **Payment Default Descriptions** below.
7. Click **Save**.

ᑭayment Default Descriptions

- **Send Receipts Via**: Click on the dropdown to select the default options allowed for receipts:
  - **Print**: Select this option to allow users to print patient receipts.
  - **Email**: Select this option to allow users to send patient receipts via email.
  - **Text**: Select this option to allow users to send patient receipts via text.
  - **Select All**: Select this option to allow users to print, email, and text patient receipts.
- **Configure Allowed Text Time**: If the Text option is selected, choose the start and end times during which text receipts are allowed to be sent.

  Important: Please note that only **Auth Reps** can turn on text receipts.

- **Send replies to**: Click the drop-down to select where any email replies to the receipt email messages should be sent to:

- **Practice email address**: Select this option to route any email replies to the practice email.
- **Other email address**: Select this option to route any email replies to an alternate email.
- **Do not accept email replies**: Select this option if you don't want to accept any email replies associated with the emailed receipts.

- **Include next appointment**: Check this box to include the patient's next appointment on the receipt.
- **Include last seen date**: Check this box to include the patient's last seen date on the receipt.
- **Include current account balance**: Check this box to include the patient's current account balance on the receipt.
- **Include the provider's tax ID**: Check this box to include the provider's tax ID on the receipt.
- **Include payment plan information if applicable**: Check this box to include any applicable payment plan information on the receipt.
- **Include a QR code to access a digital copy of the receipt** Check this box to include a QR code that will provide the patient with a digital copy of the receipt.