How to Bulk Adjust Claims

07/24/2024 4:40 pm EDT

If you have multiple claims to adjust to zero, you can do it quickly and efficiently by following the steps below:

- First, you will need to enter a setting under **Account > Provider Settings > Medical Billing**.
- It is listed under the Miscellaneous heading and is labeled **Balance Writeoff**.
  - Here you can select patient or insurance (or both) balances to automatically adjust when the claim status is changed to **Settled**.
  - Here is a help desk article that will walk through the process of entering this edit. (link)
  - You will only need to set this edit once unless you want to make any changes to it.

Once the edit is set, you can adjust claims in bulk.

- Navigate to **Billing > Live Claims Feed**.
- Identify the claims you would like to adjust. You can use the edits to select by billing status, claim status, date range, office, provider, payer, or other parameters.
- Select the claims individually by clicking on the empty box to the left of the claim ID, or in bulk by clicking on the empty box on the header row to the left of the claim ID.

- Next, select the drop-down arrow on the **Batch Status Change** box, just above the yellow header row.
- Select **Settled**.
- A **Confirm Bulk Status Change** box will appear.

Confirm Bulk Status Change   X

Please confirm batch status change of 72 claims to Settled.

Claim ID	Patient	Date of Service
184146026		8/18/2021 11:00AM
183702095		8/13/2021 09:20AM
179922392		7/06/2021 10:45AM
177023638		6/09/2021 09:00AM
177023626		6/08/2021 02:45PM
177023670		6/08/2021 02:00PM
177023627		6/08/2021 01:15PM
177023669		6/08/2021 12:30PM
177023609		6/08/2021 11:00AM
177023633		6/08/2021 10:00AM
177023673		6/08/2021 09:00AM

Warning: this action cannot be undone.

Enter CONFIRM to continue.

Confirm   Cancel

- To complete the action, type CONFIRM (all caps) in the box just below the red warning box.
- Select the blue **Confirm** button.
- All claims will be transferred to billing status Settled and have their balance adjusted to zero.