

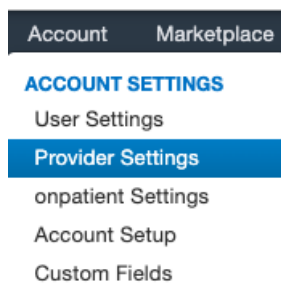
Is there an automated way to adjust balances?

07/24/2024 6:25 pm EDT

Yes!

If you routinely adjust off balances, you can save yourself time by enabling this feature.

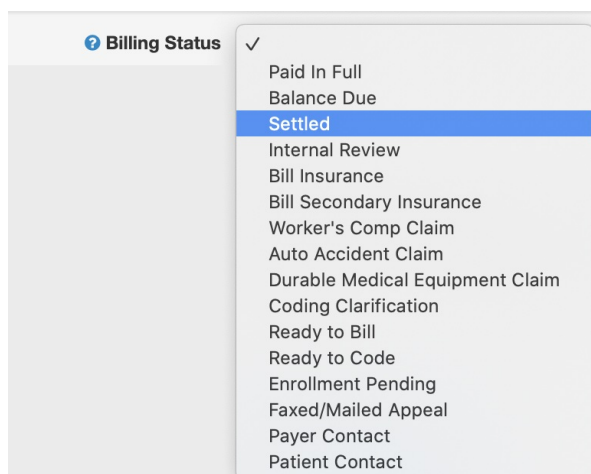
It's located under **Account > Provider Settings**.



Under the Miscellaneous heading, you will see the option listed as **Balance Writeoff**.

Balance Writeoff	<input type="text" value="Write off as Provider Discount"/>	Auto-write-off patient balance when claim is changed to "Settled"
	<input type="text" value="Do not auto write off"/>	Auto-write-off insurance balance when claim is changed to "Settled"

There is one for patient balances (first one listed) and one for insurance balances (second one listed). What this will do, when enabled, is automatically adjust any balance (either patient, insurance, or both depending on what is enabled) when the status of the claim is changed to **Settled**.



Adjusting off balances that you are not going to collect will ensure that your Accounts Receivable page and reports are accurately reflecting your outstanding AR.