## 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.

Account	Marketplace	
ACCOUNT SETTINGS		
User Settings		
Provider S	ettings	
onpatient Settings		
Account Setup		
Custom Fie	elds	

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

Balance Writeoff	Write off as Provider Discount	~	Auto-write-off patient balance when claim is changed to "Settled"
	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**.

Ø Billing Status	$\checkmark$
	Paid In Full
	Balance Due
	Settled
	Internal Review
	Bill Insurance
	Bill Secondary Insurance
	Worker's Comp Claim
	Auto Accident Claim
	Durable Medical Equipment Claim
	Coding Clarification
	Ready to Bill
	Ready to Code
	Enrollment Pending
	Faxed/Mailed Appeal
	Payer Contact
	Patient Contact

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.