

How to Bulk Adjust Claims

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

1. First, you will need to enter a setting under **Account > Provider Settings > Medical Billing**.
2. It is listed under the Miscellaneous heading and is labeled **Balance Writeoff**.
 - a. Here you can select patient or insurance (or both) balances to automatically adjust when the claim status is changed to **Settled**.
 - b. Here is a help desk article that will walk through the process of entering this edit. ([link](#))
 - c. 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.

1. Navigate to **Billing > Live Claims Feed**.
2. 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.
3. 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.

The screenshot shows the 'Live Claims Feed' interface. At the top, there are several filter and action buttons: 'Select All Offices', 'Select None', 'C new office All', 'Primary Office All', 'Test office All', 'Claim Type All', 'Claim St 0 2 0 2 0 All', 'Billing St: All', 'Appt Profiles: All', 'Calculate Counts', 'What's this?', 'TFL Warning', 'Patient', 'Payer Name', 'Payer ID', 'drc claim #', 'From', 'To', 'Clinical Note', 'Open window in new tab', 'Exclude future follow-up dates', 'Check All', 'Clear', and 'Update Filter'. Below these are 'Batch Status Change', 'Export to File', 'Custom Export', 'Display', '+Schedule', and 'Internal' buttons. The table below has a yellow header row with columns: Info, Claim ID, Patient, Date of Service, Office, Provider, Supervising Provider, Billing Provider, Billed, Allowed, Adjmt, Ins 1 Paid, Ins 2 Paid, Pt Paid, Ins Bal, Pt Line Item Bal, Claim Bal, Exp Reimbr, Ins 1, Ins 1 Status, Ins 2, Ins 2 Status, First EDI, Last EDI, Service Notes, and Billing Notes. A red arrow points to a checkbox in the 'Info' column of the header row. The table contains two data rows and a 'Totals' row at the bottom.

Info	Claim ID	Patient	Date of Service	Office	Provider	Supervising Provider	Billing Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status	First EDI	Last EDI	Service Notes	Billing Notes	
								Totals:	\$350.00	\$350.00	\$0.00	\$85.67	\$0.00	\$0.00	\$224.33	\$40.00	\$264.33	\$0.00								
<input type="checkbox"/>	338708264		1/22/2025 01:25PM	Primary Office				\$175.00	\$175.00	\$0.00	\$85.67	\$0.00	\$0.00	\$49.33	\$40.00	\$89.33	\$0.00								Balance Due	
<input type="checkbox"/>	338710344		1/22/2025 11:30AM	Primary Office				\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00	\$0.00	\$175.00	\$0.00	Cigna							Balance Due Aetna	
								Totals:	\$350.00	\$350.00	\$0.00	\$85.67	\$0.00	\$0.00	\$224.33	\$40.00	\$264.33	\$0.00								

4. Select the drop-down arrow on the **Batch Status Change** box, just above the yellow header row.
5. Select **Settled**.
6. 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
177023672		6/08/2021 09:00AM

Warning: this action cannot be undone.

Enter CONFIRM to continue.

- 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.
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