## Is there an automated way to adjust balances?

Last modified on 02/18/2025 9:09 am EST

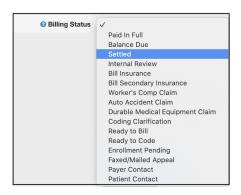
If you routinely adjust off balances, you can save time by enabling this feature.

## 1. Navigate to Account > Provider Settings.

2. Under the Miscellaneous heading, scroll down to the option labeled 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"

3. 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.