How do I post a payer/insurer/provider adjustment?

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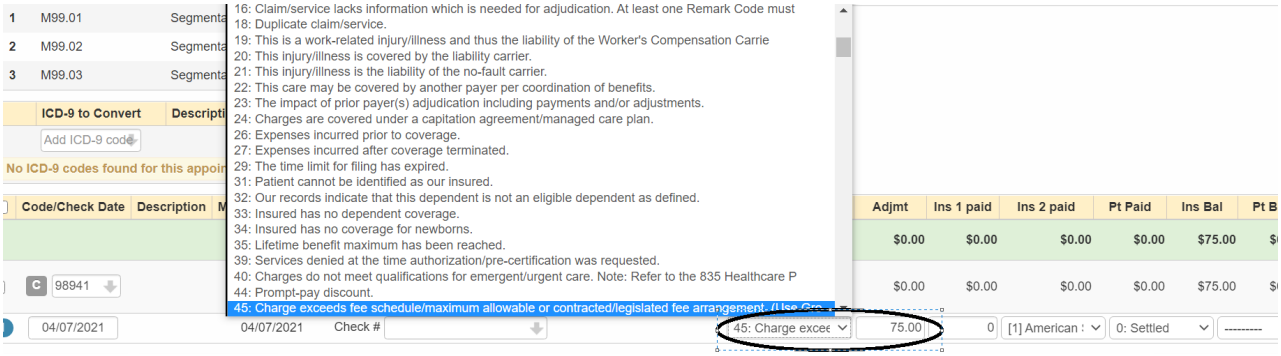
There may be times when you will need to post an adjustment to a patient's account manually. Here is how you can easily accomplish the task:

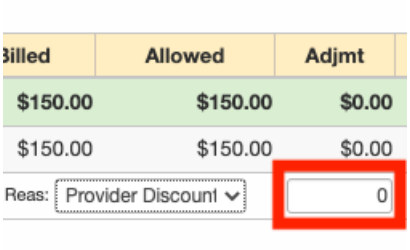
- Start with the patient's appointment. Scroll down to where the CPT/charges are listed.
- Click on the blue plus on the CPT/HCPCS line, on the right side of the screen. Clicking on this plus symbol will open up a new line where you can post the adjustment.

- Click on the drop-down next to the Adjustment Reason column.

- From the dropdown, select the appropriate option.
  - For a CO45 contractual obligation, you would scroll down and select "45".
  - For a provider adjustment, you would select "provider adjustment".
  - For a patient bad debt adjustment, you would select "patient bad debt write-off". This would clear the balance from the patient's account, and your overall AR; however, you could still send the amount to a third-party collection agency, if you choose to do so.



- After selecting the reason code, you will enter the amount to be adjusted in the very next box to the right, under the yellow "Adjmt" column. You do not need to enter a negative number or (-) sign. The system will know to subtract that amount from the amount due to the reason you selected.



- After entering the reason code and amount, click on **Verify and Save**. The system will make the appropriate adjustments. You can view the results of your entry by looking at the green status bar.
    - In this example, a provider discount of $150.00 was posted. You can see the $150 under the adjustment column, and a $0.00 balance under both "ins bal" and "pt bal".