

NEWTSTED

Enter an Adjustment

Last Modified on 08/25/2025 4:33 pm EDT

About

There are two ways to enter adjustments into the system, manually by Line Item or through the Line Item Auto Pay / Adjustment Form.

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Enter an Adjustment for an Individual Line Item

1. Navigate to the Line Items Filters Form: **File > Billing > Line Items**.
2. Enter a **Case No.** or search for the client using other filters as necessary.
3. Click the **Ok** button. The Line Items List displays a list of Line Items based on the filters that were set.
4. Select a Line Item and click the **Transactions** button.
5. Click the **Transaction Form** tab.

Lines	Event Date / Time	Proc Code ID	Amount	Balance
1	07/29/2021 09:00:00 AM	90801	0.00	0.00

Pri	Ins ID	Client Family	Billed
1	BCMI	Client	Y
9	SP	Client	Y

Client Number	Client Last Name	Client First Name	Client Middle Name	Event Date / Time	Agency
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6. Click the **Add** button.
7. In the **Paid Amount** field, enter what you've been paid (or leave it \$0.00 if you haven't received any payment).
8. In the **Adjusted Amount** field, enter the amount to be adjusted. If you did not get paid anything for this Line Item, make sure to put the full charge amount here to adjust the charge in full.
9. Select an adjustment reason from the **Adjustment Note** drop-down menu.
10. Click the **Save** button.

Enter Adjustments to Line Items in Bulk

The write-off of multiple Line Items at once, such as if one of your clients is in collections or if you passed timely filing with an insurance payer, is best handled via the Line Item Auto Pay / Adjustment Form.



Warning: This workflow is used to write off Line Items in bulk and caution should be taken when using this form.

1. Navigate to the Line Items Auto Pay / Adjustment Form: **File > Billing > Line Items Auto Pay / Adjustment**
2. Enter in a **Case No.** or search for a client.
3. Enter or select any other fields as appropriate to find your Line Items.





Tip: It is recommended to open the Line Items Form (**File > Billing > Line Items**) and use the same filters to make sure the number of records to process in this form match the number of Line Items in the Line Items List, so that you are not auto-adjusting something off in error.

4. In the **Transaction Type** field, enter an **A** to fully adjust off the Line Item.
5. In the **Transaction Note** drop-down menu, select the adjustment reason you want to attach to each record that is adjusted.
6. Click the **Ok** button.
7. A prompt is displayed, "The system found # records to change. Please click Yes to continue or No to cancel." Click the **Yes** button.

Line Items Auto Pay / Adjustment Form - (LINAPAYF)

Agency ID: ALL

Program ID: ALL

Case No.: 1175

Clinician ID: ALL

Beginning: / /

Activity Code ID: ALL

Site ID: ALL

Insurance ID: ALL

Party Type: ALL

Procedure Code: ALL

Billing Group: ALL

Transaction Type (P/A): A

Remit Date: 08/25/2025

Receipt Number:

Transaction Note: WO

Click OK to continue or click Cancel to quit.

OK **Cancel**

Records To Process: 0

Records Processed: 0

Line Items Auto Pay / Adjustment Form - (LINAPAYF)

The system found 17 records to change. Please click Yes to continue or No to cancel.

Yes **No**

8. A window is displayed, "Process Complete!" Click the **OK** button.