

Enter an Adjustment

Last Modified on 11/18/2021 9:02 am EST

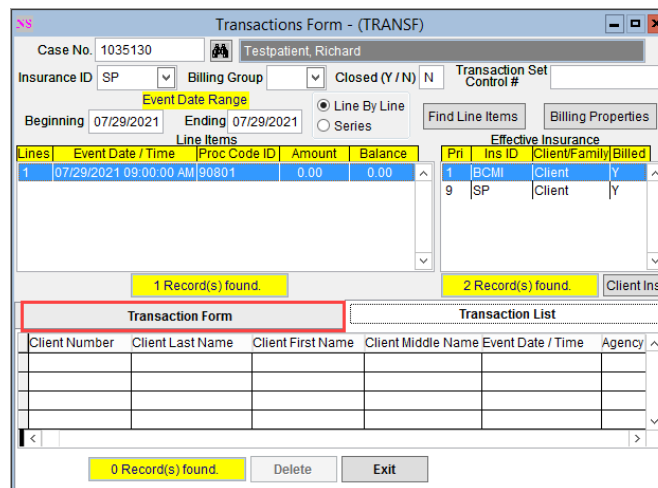
About

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

[Table of Contents](#)

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.



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.

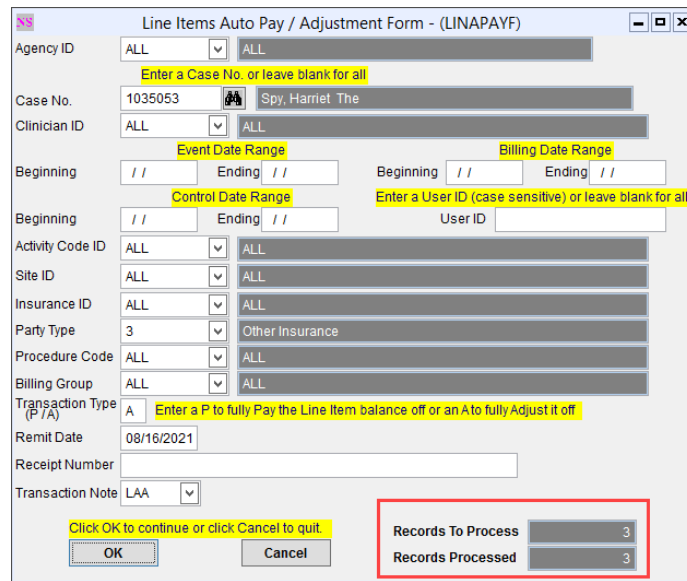


Warning: This workflow is used to write off Line Items in bulk and caution should be taken when using this form.

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, "Please verify that all filter criteria you want have been entered. Do you want to proceed?" Click the **Yes** button.
8. A prompt is displayed, "Process Complete!" Click the **OK** button.
9. The Line Items Auto Pay / Adjustment Form will display how many records were processed.



The screenshot shows the 'Line Items Auto Pay / Adjustment Form - (LINAPAYF)'. The form contains several filter fields: Agency ID (ALL), Case No. (1035053), Clinician ID (ALL), Event Date Range, Billing Date Range, Control Date Range, User ID, Activity Code ID (ALL), Site ID (ALL), Insurance ID (ALL), Party Type (3 - Other Insurance), Procedure Code (ALL), Billing Group (ALL), Transaction Type (A), Remit Date (08/16/2021), Receipt Number, and Transaction Note (LAA). At the bottom right, a summary table shows 'Records To Process' and 'Records Processed', both with a value of 3.

Records To Process	3
Records Processed	3