

Modifying Multiple Claims

Last Modified on 10/30/2025 4:48 pm EDT

Choice EMR offers an option to make certain changes to multiple claims at one time. This option is called **Modify Selected Claim(s)**. Changes which involve patient information, such as insurance or responsible party, cannot be changed using this functionality; however, changes such as Claim Status, Rendering Provider, Service Location, etc. can be changed for a group of claims. In the event that you need to modify claims, here are the appropriate steps.

1. Go to Claim Query and search for the claims you wish to modify.

The screenshot shows the 'Billing List' window with the 'Claim Query' option selected in the left-hand menu. The 'Advanced Search' dialog box is open, displaying various search criteria fields. The 'Commonly Used' section includes fields for Claim ID, Claim Xref, Date of Service (04/01/2022 to 04/15/2022), Submission (EST), Created, Status List, Level List, and Owner. Below these fields are expandable sections for 'Patient' and 'Claim'.

2. Check the box next to the claims which need to be updated, click the Claim icon, and select **Modify**.

The screenshot shows the 'Billing List' window with a table of claims. The 'Claim' icon in the top toolbar is clicked, opening a context menu with options: History, Copy, Modify, Comments, Reminder, Send Communication, and Custom Task. The 'Modify' option is highlighted. The table below shows a list of claims with checkboxes for selection.

#		Claim ID	Claim DOS
1	☒	32395	04/07/2
2	☒	32397	04/08/2
3	☐	32396	04/07/2
4	☒	32406	04/07/2
5	☒	32399	04/14/2
6	☒	32405	04/15/2
7	☒	32398	04/12/2022

3. In the dialog box that opens, you will see multiple options which will allow you to make changes to the selected claims. Check the box next to the item(s) you wish to modify, then use the drop down to select the result.

Modify Claim Values

☒ Status

In process - step 1, Statement
 In process - step 2, Electronic
 In process - step 2, Paper
 In process - step 2, Statement
 In process - step 3, Electronic
System Status
 Done
 Payment Arrangement
Ready to Send Primary, Electronic
 Ready to Send Primary, Paper
 Ready to Send Secondary, Electronic
 Ready to Send Secondary, Paper
 Ready to Send Tertiary, Electronic
 Ready to Send Tertiary, Paper
 Ready to Send, Statement
 Refund
 Rejected
 Sent, Electronic
 Sent, Paper
 Sent, Statement
☐ Override the payer/service location state check.

☐ Owner

Q

☐ Service Location

▼

☐ Patient Location

▼

☐ Patient Provider

▼

☐ Rendering Provider

▼

☐ Referring Provider

▼

☐ Alternate Provider

▼

☐ Ordering Provider

▼

☐ Supervising Provider

▼

At most 3 claims can be updated [View Details](#)

4. When all appropriate selections are made, click **Save**.

Modify Claim Values

☒ Status

In process - step 1, Statement
 In process - step 2, Electronic
 In process - step 2, Paper
 In process - step 2, Statement
 In process - step 3, Electronic
System Status
 Done
 Payment Arrangement
Ready to Send Primary, Electronic
 Ready to Send Primary, Paper
 Ready to Send Secondary, Electronic
 Ready to Send Secondary, Paper
 Ready to Send Tertiary, Electronic
 Ready to Send Tertiary, Paper
 Ready to Send, Statement
 Refund
 Rejected
 Sent, Electronic
 Sent, Paper
 Sent, Statement
☐ Override the payer/service location state check.

☐ Owner

Q

☐ Service Location

▼

☐ Patient Location

▼

☐ Patient Provider

▼

☐ Rendering Provider

▼

☐ Referring Provider

▼

☐ Alternate Provider

▼

☐ Ordering Provider

▼

☐ Supervising Provider

▼

At most 3 claims can be updated [View Details](#)

5. Note: If you choose the Balance Write-Off functionality, this option will zero out any remaining balance on any of the selected claims. You cannot do a partial amount write-off, or only write-off certain procedure lines.

Modify Claim Values

☐ Status

☐ Substatus

☐ Billing

☐ Level

☐ Validation

☒ Balance Writeoff

Courtesy Write-Off

☐ POS

☐ Claim Comments

Claim Comments

☐ Override the Payer/Service location state check.

☐ Owner

Q

☐ Service Location

☐ Patient Location

☐ Patient Provider

☐ Rendering Provider

☐ Referring Provider

☐ Alternate Provider

☐ Ordering Provider

☐ Supervising Provider

At most 3 claims can be updated

[View Details](#)

Clear

Save

Close