Add a Custom Claim Status

⚠️ You can edit any custom claim status you create, but cannot change the default claim statuses provided by the CollaborateMD software.

1. Select **Customer Setup** > **Customization** > **Custom Claim Statuses**.

2. Click the **Edit** button.

3. Scroll to the bottom of the screen and click the blank field (last line).

4. Type your custom status in the field.

5. Use the **Due To** drop-down menu to control who is responsible for any outstanding balance.

    1. **Patient**: Any remaining balance for any charges assigned to this status will contribute to the patient balance.

    2. **Insurance**: Any remaining balance for any charges assigned to this status will contribute to the insurance balance.

    3. **None**: Any remaining balance for any charges assigned to this status is not counted towards any insurance or patient balance.

6. Checking the **Use Payer** box will replace the word *Insurance* with the actual insurance name when assigned to a charge.

    🪄 For example, "Charge Due *Insurance"* would display as "Charge Due *Florida Medicare*", if assigned to a Medicare Claim.

7. Placing a check in the **Restricted** box will limit access to only users with the "**Set Restricted Claim Status**" permission.

8. Click **Save**.