


Update Claim Status From Follow Up Management

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The "**Update Status**" option allows users to update the status of multiple claims simultaneously directly from the follow-up screen.

Follow these steps to update claim statuses in bulk:

1. Select **Claim > Follow Up Management**.
2. Enter your Search Criteria or Load a Search Filter.
3. Place a check in the box next to the claim(s) you wish to update the status for.
4. Select the **Update Status** button.
5. Select an option to update the Status using the:
 1. Use the **Current Payer** option to use the current payer on the claim as the priority when updating the status.
 2. Use the **Primary Payer option** to Use this option to use the primary payer on the claim as the priority when updating the status.
 3. Use the **Secondary Payer** option to use the Secondary Payer on the claim as the priority when updating the status.
 4. Use the **Tertiary Payer** option to use the tertiary payer on the claim as the priority when updating the status.
6. Click **Save**.

 Setting the status to "Send to Insurance via Clearinghouse" will send the claim to the clearinghouse in real time and provide you with any issues or rejections before sending the claim to the payer if you have RTCS enabled. If RTCS is not enabled, claims set to this status will be sent in a batch at the end of the day. Alternatively, you can use the Submit Claims button to submit the claims immediately.

7. Click **Close** to exit.
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