Patient Balance Ledger

Last modified on 10/06/2025 3:00 pm EDT

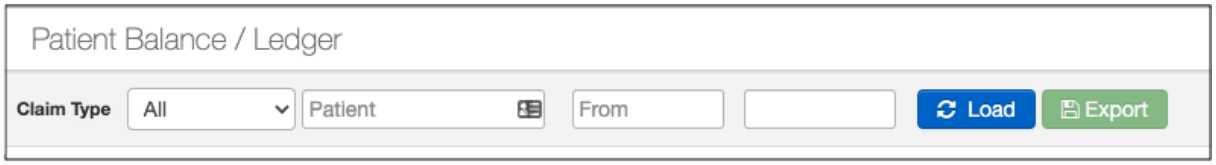
The Patient Balance Ledger provides a detailed view of all outstanding balances for each patient, clearly categorized by amounts pending from insurance and amounts due directly from the patient.

Ledger| Video Walkthrough

Ledger

1. To navigate to the ledger, hover over the **Billing** header and select **Patient Balance Ledger.** As with other screens in DrChrono, you have several options to view the information.

   In the patient balance ledger, your options include:



2. **Claim Type** - If institutional claims are enabled for your account, you will see the claim type option. You can use it to select between institutional or professional claims or both. If you do not have institutional claims enabled, you will not see this option.

3. **Patient** - You can search for a specific patient.

4. **Date range** - You can select a specific date of service or a date range.

Once you have your selections chosen, press on the blue **Load** button for the information to populate. You also have the option to export the information to a file that will be available in your message center.

The information will populate and be broken down into 30-day range increments.

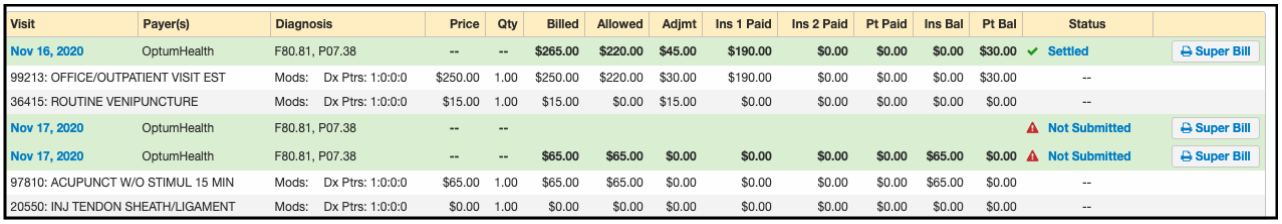


Responsible Party		0-30 Days	31-60 Days	61-90 Days	90-120 Days	121+ Days	Total
	Totals:	$1,135.00	$0.00	$0.00	$0.00	$0.00	$1,135.00
PATIENT	Craig Moke	$30.00	$0.00	$0.00	$0.00	$0.00	$30.00
87726	OptumHealth	$1,105.00	$0.00	$0.00	$0.00	$0.00	$1,105.00

Please note the patient above is a sample patient with test data.

You can see additional information for any of the figures by selecting any of the blue dollar figures. It will expand

and show you additional details. You can print a Super Bill from this screen by pressing the icon labeled **Super Bill** on the right.



Visit	Payer(s)	Diagnosis	Price	Qty	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Status	
Nov 16, 2020	OptumHealth	F80.81, P07.38	--	--	$265.00	$220.00	$45.00	$190.00	$0.00	$0.00	$0.00	$30.00	✔ Settled	Super Bill
99213: OFFICE/OUTPATIENT VISIT EST		Mods: Dx Ptrs: 1:0:0:0	$250.00	1.00	$250.00	$220.00	$30.00	$190.00	$0.00	$0.00	$0.00	$30.00	--	
36415: ROUTINE VENIPUNCTURE		Mods: Dx Ptrs: 1:0:0:0	$15.00	1.00	$15.00	$0.00	$15.00	$0.00	$0.00	$0.00	$0.00	$0.00	--	
Nov 17, 2020	OptumHealth	F80.81, P07.38	--	--									⚠ Not Submitted	Super Bill
Nov 17, 2020	OptumHealth	F80.81, P07.38	--	--	$65.00	$65.00	$0.00	$0.00	$0.00	$0.00	$65.00	$0.00	⚠ Not Submitted	Super Bill
97810: ACUPUNCT W/O STIMUL 15 MIN		Mods: Dx Ptrs: 1:0:0:0	$65.00	1.00	$65.00	$65.00	$0.00	$0.00	$0.00	$0.00	$65.00	$0.00	--	
20550: INJ TENDON SHEATH/LIGAMENT		Mods: Dx Ptrs: 1:0:0:0	$0.00	1.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	--	

You can also press on the blue date of service on the left of the screen. It will take you to the Live Claims Feed where you can see additional details and/or take action on the appointment if needed.

Video Walkthrough