

# Patient Balance Ledger

09/09/2024 3:54 pm EDT

The patient balance ledger will display all outstanding balances, per patient, categorized by whether they are pending from insurance or are due from the patient themselves.

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.

Patient Balance / Ledger

Claim Type

In the patient balance ledger, your options include:

- **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.*
- **Patient** - You can search for a specific patient.
- **Date range** - You can select a specific date of service or date range.

Once you have your selections chosen, click 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.

Patient Balance / Ledger

Responsible Party	0-30 Days	31-60 Days	61-90 Days	90-120 Days	121+ Days	Total
<b>Totals:</b>	<b>\$1,135.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,135.00</b>
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 clicking on any of the blue dollar figures. It will expand and show you additional details. You can print a Super Bill from this screen by clicking on 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	
<a href="#">Nov 16, 2020</a>	OptumHealth	F80.81, P07.38	--	--	\$265.00	\$220.00	\$45.00	\$190.00	\$0.00	\$0.00	\$0.00	\$30.00	✓ Settled	<a href="#">Super Bill</a>
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	--	
<a href="#">Nov 17, 2020</a>	OptumHealth	F80.81, P07.38	--	--									⚠ Not Submitted	<a href="#">Super Bill</a>
<a href="#">Nov 17, 2020</a>	OptumHealth	F80.81, P07.38	--	--	\$65.00	\$65.00	\$0.00	\$0.00	\$0.00	\$0.00	\$65.00	\$0.00	⚠ Not Submitted	<a href="#">Super Bill</a>
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 click 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.