# Charge Analysis Report

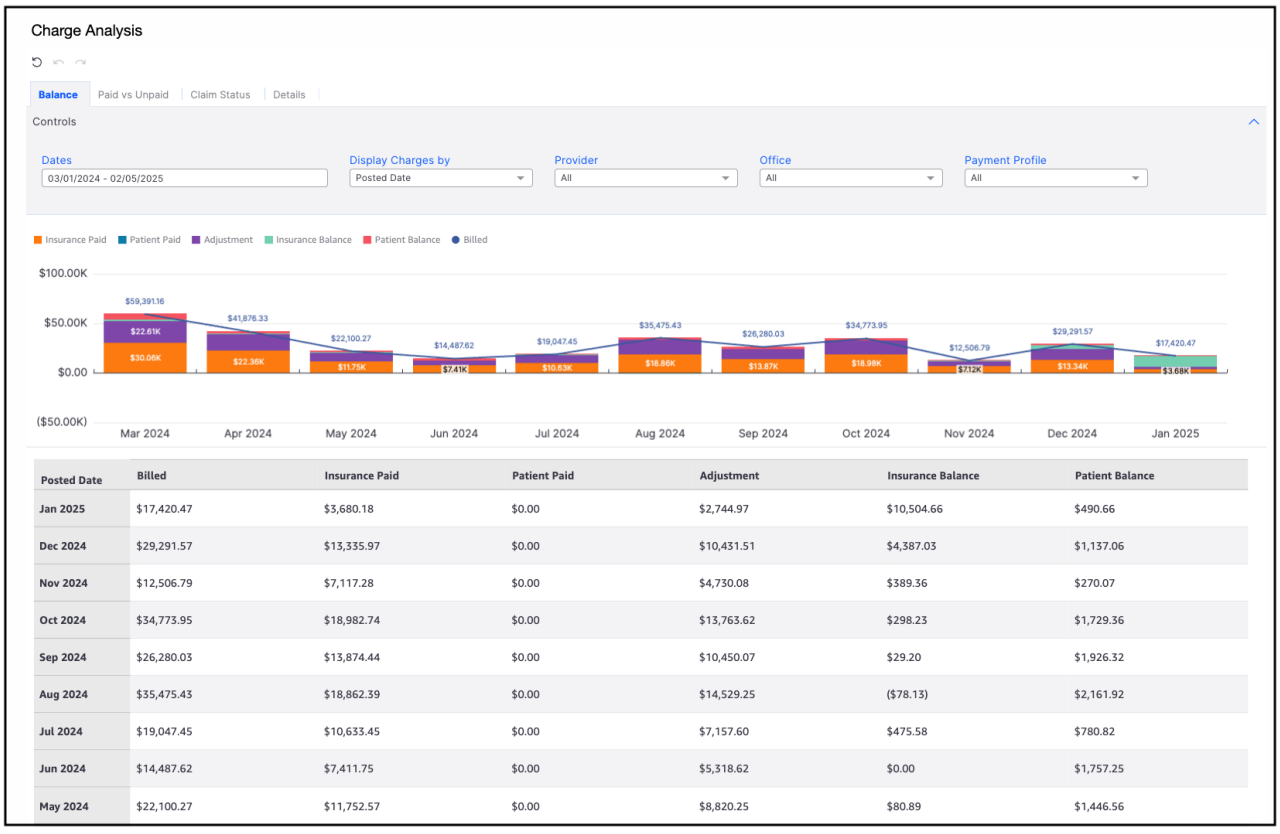
Last modified on 10/02/2025 2:29 pm EDT

The Charge Analysis Report provides a detailed view of the charges generated by your practice. It offers several filters to highlight specific parameters, enabling more targeted analysis.  Available filters include: Date Range, Charges by Date of Service or Posted Date, Provider, Office, or Payment Profile.

**Balance tab | Paid vs Unpaid | Claim Status | Details | Video Walkthrough**

## Balance tab

Once parameters are selected, the data is displayed in both a chart and a table. The report includes Insurance Paid, Patient Paid, Adjustments, Insurance Balance, Patient Balance, and Billed Charges. The chart also allows you to click any dollar amount to view the detailed breakdown behind it.



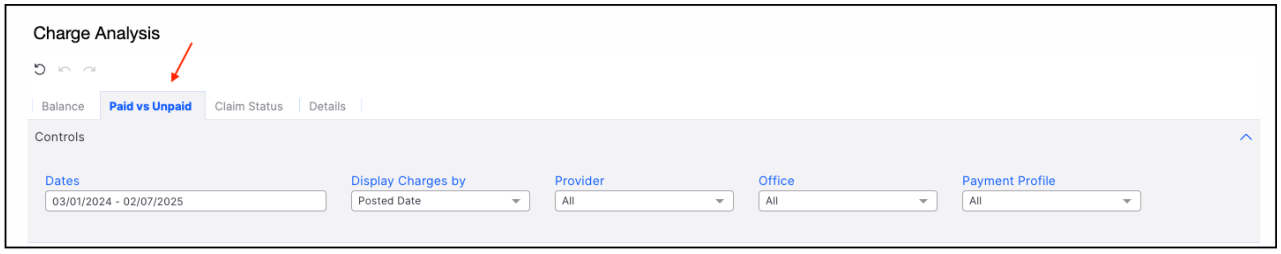

| Posted Date | Billed | Insurance Paid | Patient Paid | Adjustment | Insurance Balance | Patient Balance |
|---|---|---|---|---|---|---|
| Jan 2025 | $17,420.47 | $3,680.18 | $0.00 | $2,744.97 | $10,504.66 | $490.66 |
| Dec 2024 | $29,291.57 | $13,335.97 | $0.00 | $10,431.51 | $4,387.03 | $1,137.06 |
| Nov 2024 | $12,506.79 | $7,117.28 | $0.00 | $4,730.08 | $389.36 | $270.07 |
| Oct 2024 | $34,773.95 | $18,982.74 | $0.00 | $13,763.62 | $298.23 | $1,729.36 |
| Sep 2024 | $26,280.03 | $13,874.44 | $0.00 | $10,450.07 | $29.20 | $1,926.32 |
| Aug 2024 | $35,475.43 | $18,862.39 | $0.00 | $14,529.25 | ($78.13) | $2,161.92 |
| Jul 2024 | $19,047.45 | $10,633.45 | $0.00 | $7,157.60 | $475.58 | $780.82 |
| Jun 2024 | $14,487.62 | $7,411.75 | $0.00 | $5,318.62 | $0.00 | $1,757.25 |
| May 2024 | $22,100.27 | $11,752.57 | $0.00 | $8,820.25 | $80.89 | $1,446.56 |

## Paid vs Unpaid

The second tab provides a view of claim dollars that have been paid, are pending, or have not yet been submitted to the payer.

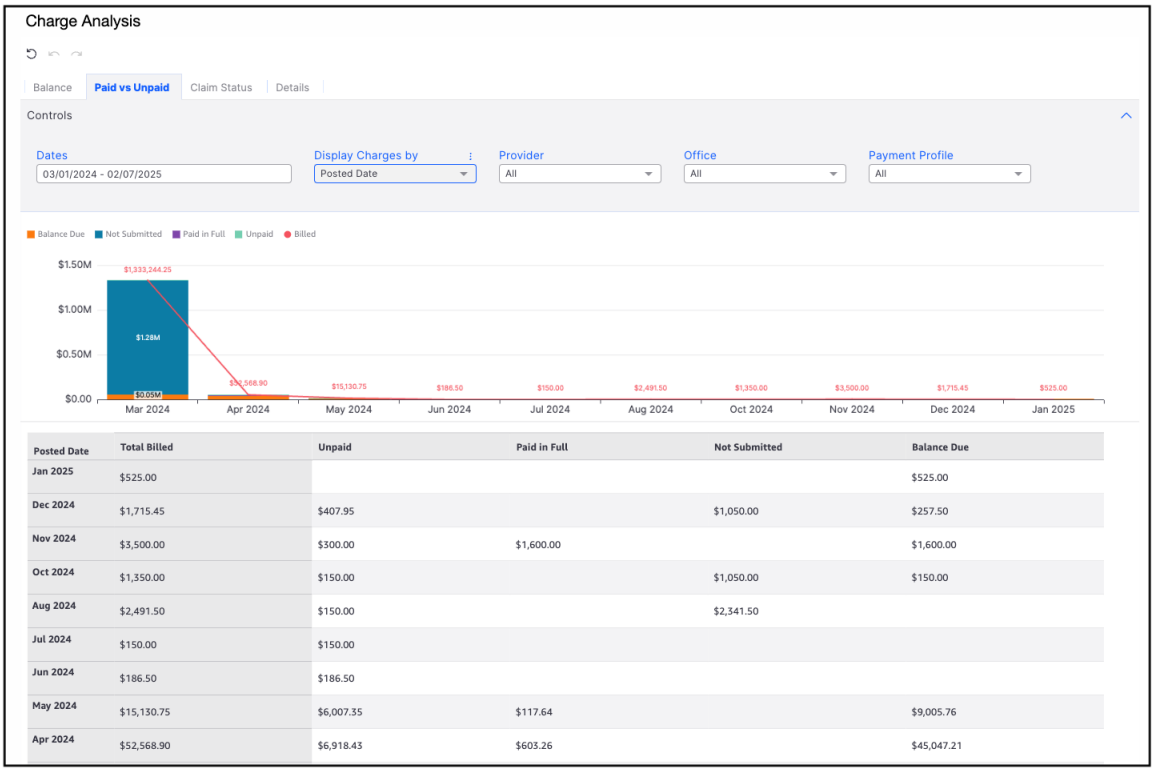
You can refine the report using several parameters, including:

- Date range
- Display by charge posted date or date of service
- Specific provider(s)
- Specific office(s)
- Specific payment profile(s)



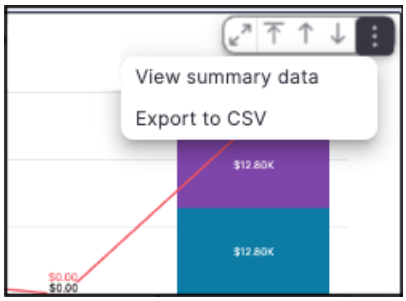

The Paid vs Unpaid tab allows you to see charges as:

- Total Billed
- Unpaid dollar amount
- Paid in Full dollar amount
- Not Submitted dollar amount
- Balance due amount




| Posted Date | Total Billed | Unpaid | Paid in Full | Not Submitted | Balance Due |
|---|---|---|---|---|---|
| Jan 2025 | $525.00 | | | | $525.00 |
| Dec 2024 | $1,715.45 | $407.95 | | $1,050.00 | $257.50 |
| Nov 2024 | $3,500.00 | $300.00 | $1,600.00 | | $1,600.00 |
| Oct 2024 | $1,350.00 | $150.00 | | $1,050.00 | $150.00 |
| Aug 2024 | $2,491.50 | $150.00 | | $2,341.50 | |
| Jul 2024 | $150.00 | $150.00 | | | |
| Jun 2024 | $186.50 | $186.50 | | | |
| May 2024 | $15,130.75 | $6,007.35 | $117.64 | | $9,005.76 |
| Apr 2024 | $52,568.90 | $6,918.43 | $603.26 | | $45,047.21 |

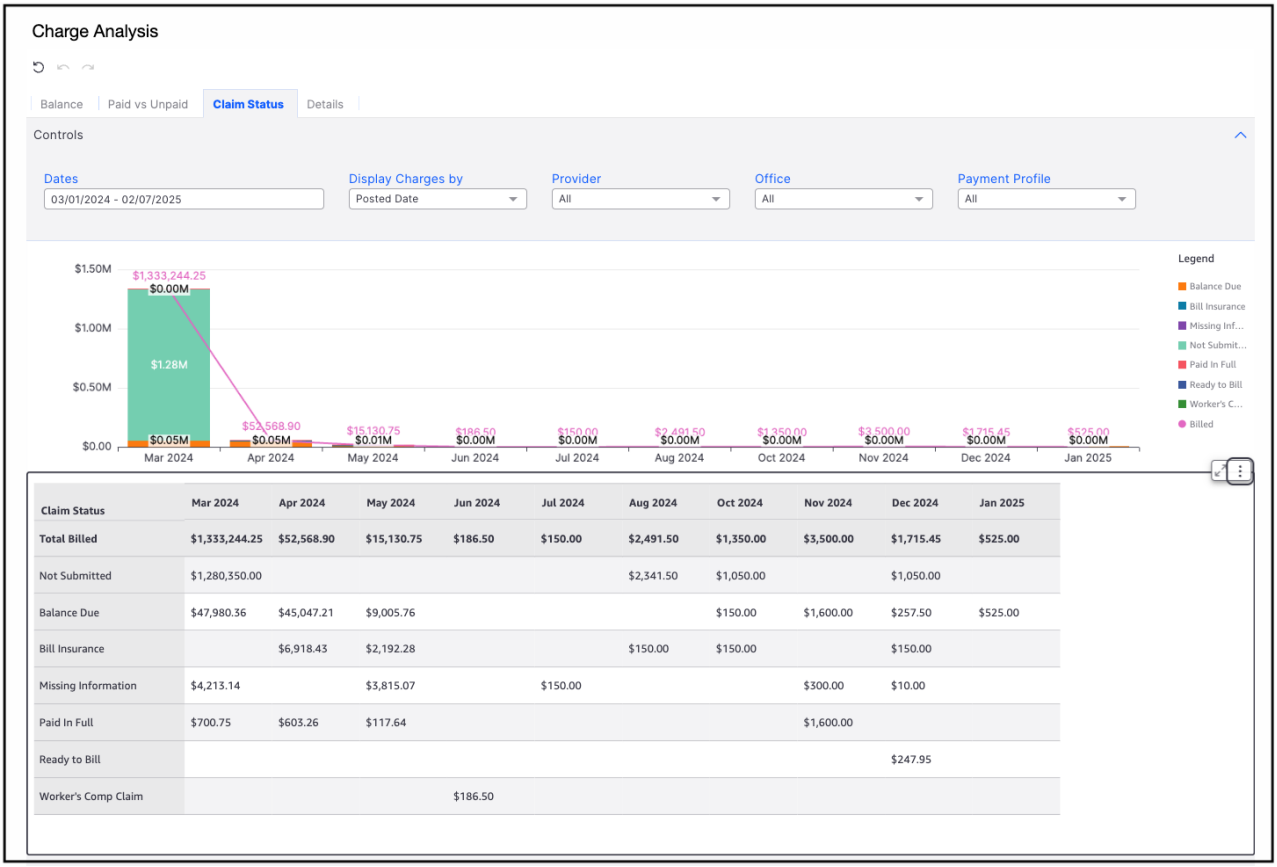
To export the report to CSV, hover in the right corner of the report, and the option to export will appear. Once exported, the report will be available in your message center.




Additional options include maximizing the screen (diagonal arrows), drilling up to the top from the filter date (up arrow with line), drilling up from the filter date (up arrow), and drilling down from the filter date (down arrow).

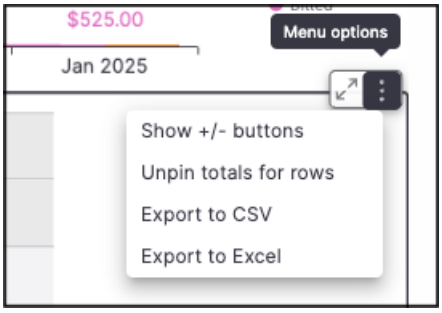
## Claim Status

The third tab displays claim dollars categorized by claim status, including not submitted, balance due, bill insurance, missing information, paid in full, ready to bill, and workers' comp claims. You can refine the report using several parameters, including date range, display by charge posted date or date of service, specific provider(s), specific office(s), and specific payment profile(s).



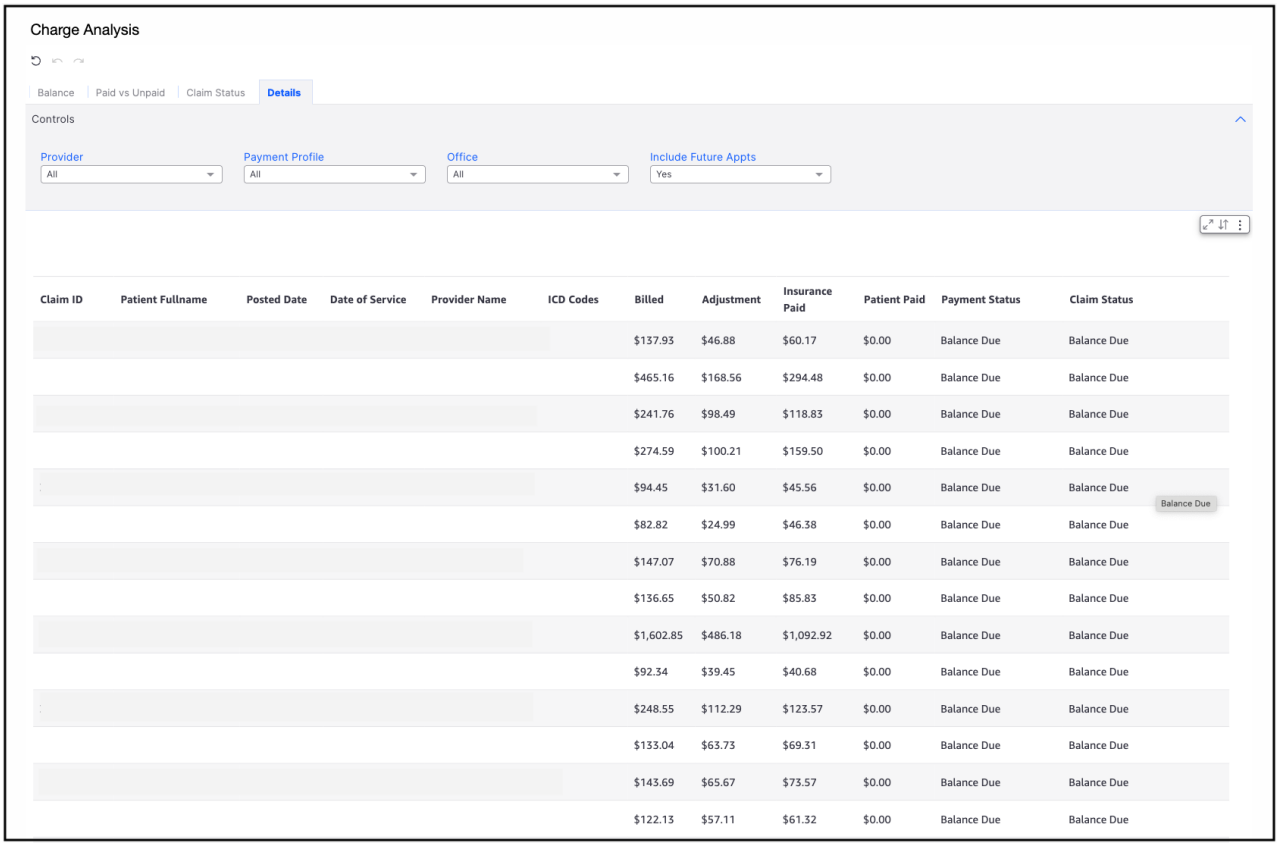

| Claim Status | Mar 2024 | Apr 2024 | May 2024 | Jun 2024 | Jul 2024 | Aug 2024 | Oct 2024 | Nov 2024 | Dec 2024 | Jan 2025 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Billed** | **$1,333,244.25** | **$52,568.90** | **$15,130.75** | **$186.50** | **$150.00** | **$2,491.50** | **$1,350.00** | **$3,500.00** | **$1,715.45** | **$525.00** |
| Not Submitted | $1,280,350.00 | | | | | $2,341.50 | $1,050.00 | | $1,050.00 | |
| Balance Due | $47,980.36 | $45,047.21 | $9,005.76 | | | | $150.00 | $1,600.00 | $257.50 | $525.00 |
| Bill Insurance | | $6,918.43 | $2,192.28 | | | $150.00 | $150.00 | | $150.00 | |
| Missing Information | $4,213.14 | | $3,815.07 | | $150.00 | | | $300.00 | $10.00 | |
| Paid In Full | $700.75 | $603.26 | $117.64 | | | | | $1,600.00 | | |
| Ready to Bill | | | | | | | | | $247.95 | |
| Worker's Comp Claim | | | | $186.50 | | | | | | |

To export the report to CSV or MS Excel, hover in the right corner of the report, and options to export will appear. Once exported, the report will be available in your message center.




## Details

The fourth tab displays the detailed information behind the report. You can customize the report using the following filters: provider (one, several, or all), payment profile (one, several, or all), office (one, several, or all), and whether to include future appointments (yes or no).




## Video Walkthrough