Charge Analysis Report

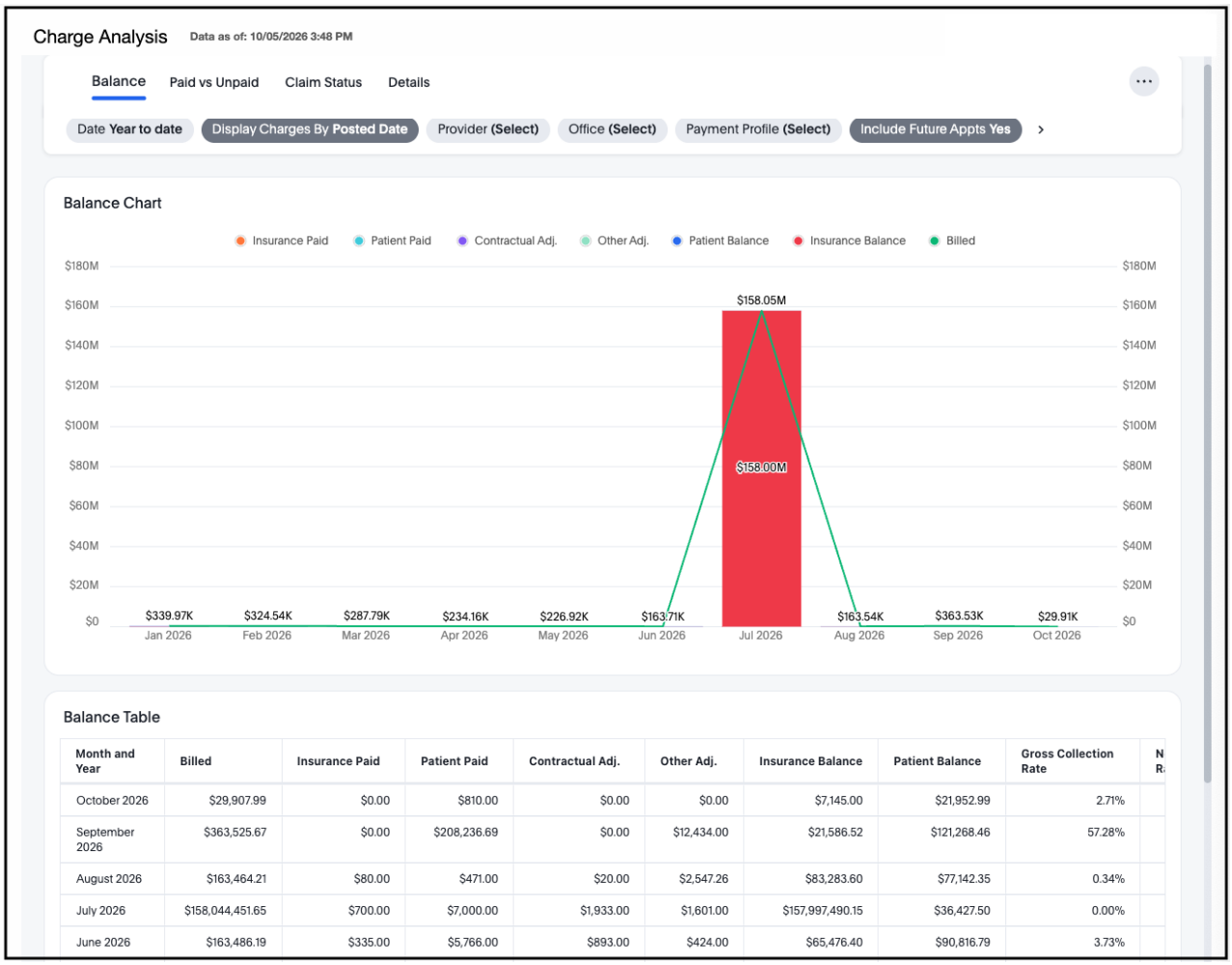
Last modified on 11/06/2026 12:25 pm EST

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, Payment Profile, and the ability to choose whether to include or exclude future appointments.

Balance tab | Save View | Paid vs Unpaid | Claim Status | Details | Video Walkthrough

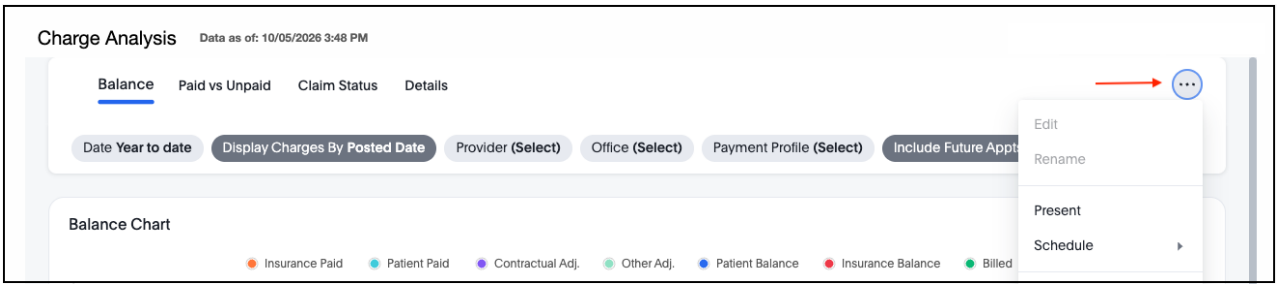
Balance tab

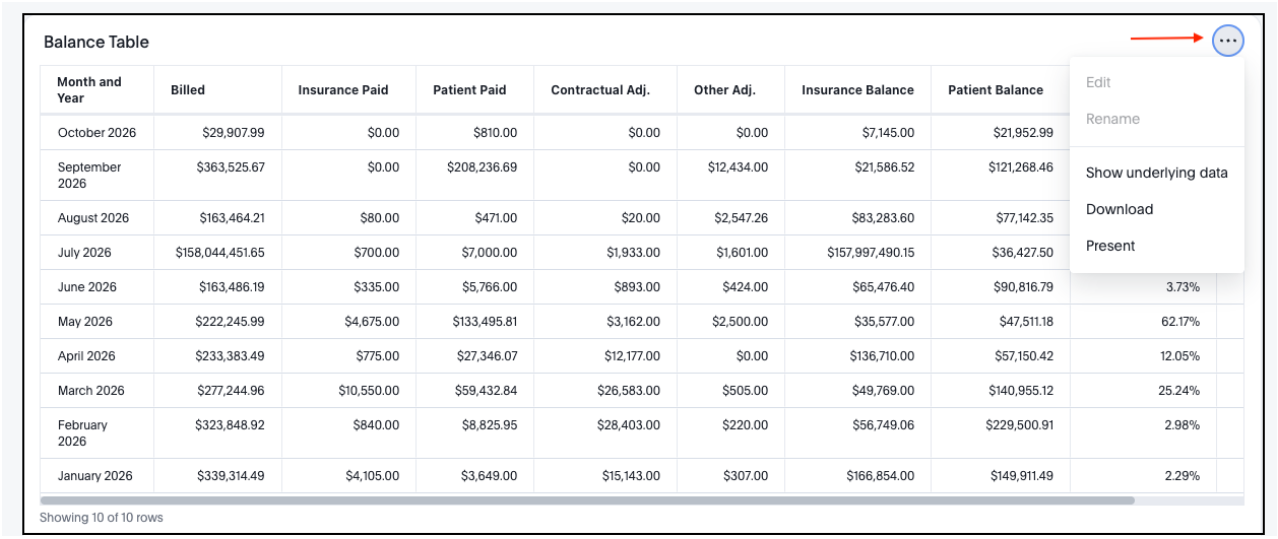
Once parameters are selected, the data is displayed in both a chart and a table.



Month and Year	Billed	Insurance Paid	Patient Paid	Contractual Adj.	Other Adj.	Insurance Balance	Patient Balance	Gross Collection Rate	N R
October 2026	$29,907.99	$0.00	$810.00	$0.00	$0.00	$7,145.00	$21,952.99	2.71%	
September 2026	$363,525.67	$0.00	$208,236.69	$0.00	$12,434.00	$21,586.52	$121,268.46	57.28%	
August 2026	$163,464.21	$80.00	$471.00	$20.00	$2,547.26	$83,283.60	$77,142.35	0.34%	
July 2026	$158,044,451.65	$700.00	$7,000.00	$1,933.00	$1,601.00	$157,997,490.15	$36,427.50	0.00%	
June 2026	$163,486.19	$335.00	$5,766.00	$893.00	$424.00	$65,476.40	$90,816.79	3.73%	

Pressing the three horizontal dots in the top right corner of each tile will expose options to schedule the report to run on a preset cadence, download the information, view underlying data, or view in presentation mode.





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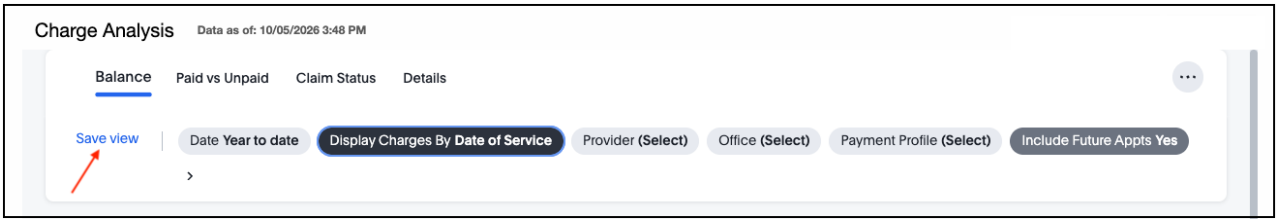
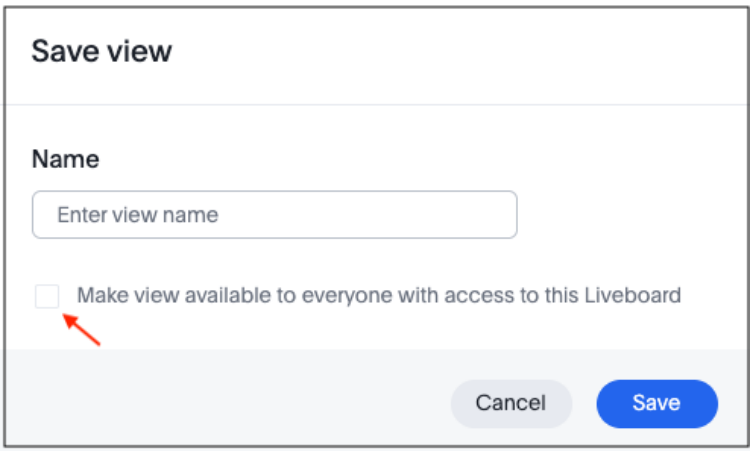
June 2026	$163,486.19	$335.00	$5,766.00	$893.00	$424.00	$65,476.40	$90,816.79	3.73%
May 2026	$222,245.99	$4,675.00	$133,495.81	$3,162.00	$2,500.00	$35,577.00	$47,511.18	62.17%
April 2026	$233,383.49	$775.00	$27,346.07	$12,177.00	$0.00	$136,710.00	$57,150.42	12.05%
March 2026	$277,244.96	$10,550.00	$59,432.84	$26,583.00	$505.00	$49,769.00	$140,955.12	25.24%
February 2026	$323,848.92	$840.00	$8,825.95	$28,403.00	$220.00	$56,749.06	$229,500.91	2.98%
January 2026	$339,314.49	$4,105.00	$3,649.00	$15,143.00	$307.00	$166,854.00	$149,911.49	2.29%

Save View

To save the filters set, press **Save View** on the left side of the screen.

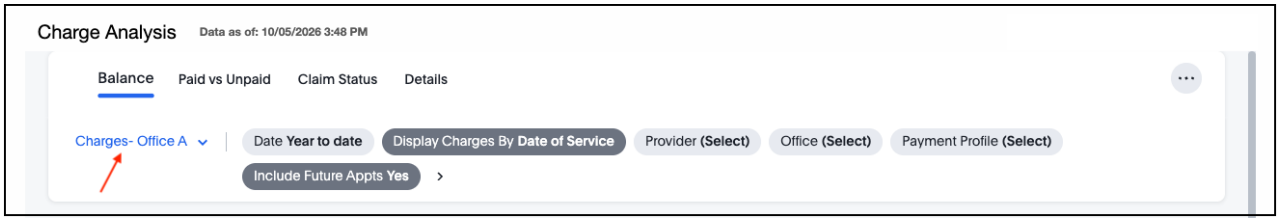


Enter a name for the view when prompted. To share the view with colleagues, check the box next to **Make view available to everyone with access to this Liveboard**.



Saved views preserve all filter selections, including date type and grouping. They do not save a specific date range.

To rerun the report, select it from the left side of the screen. If it doesn't show, press the down arrow to view additional saved views.

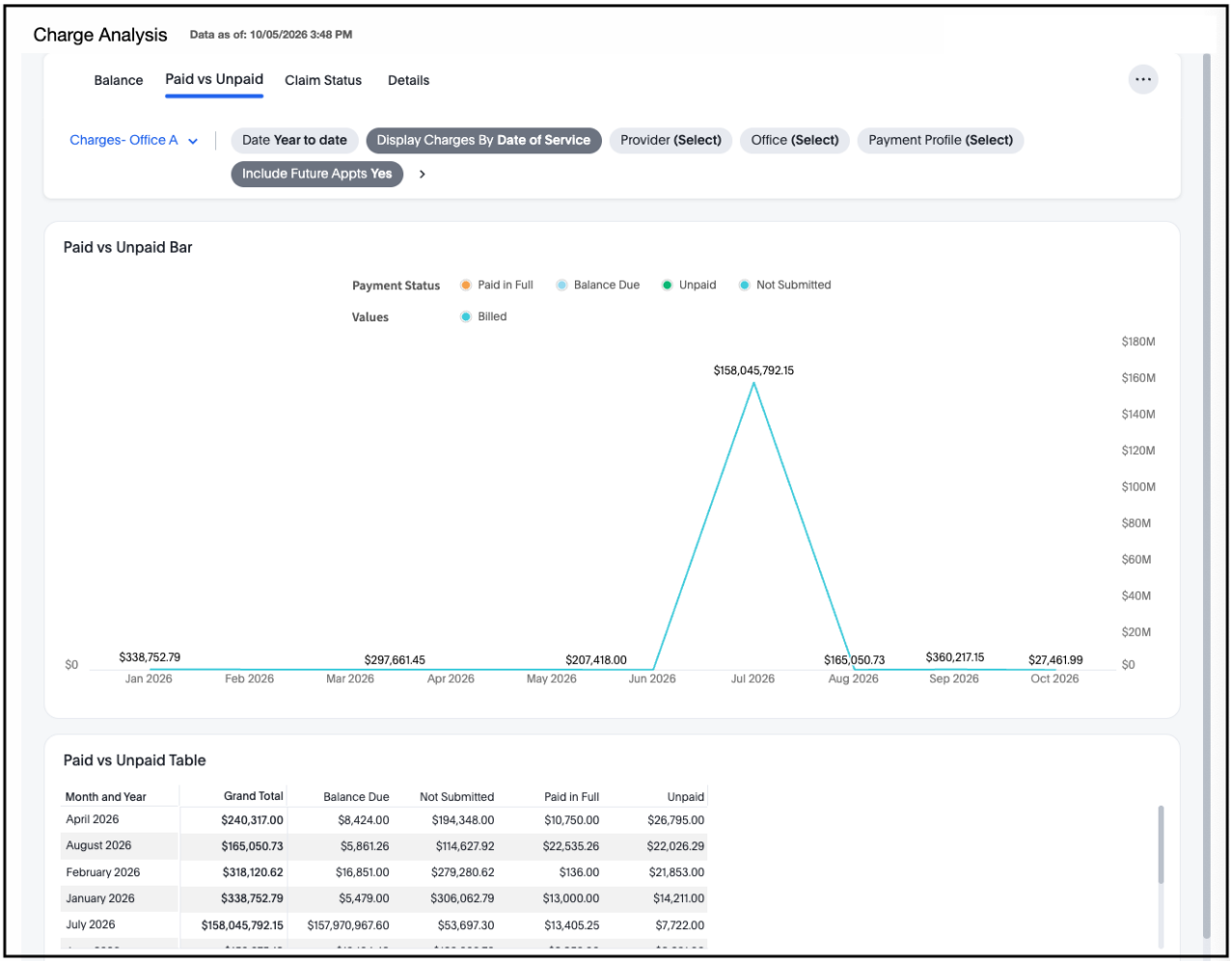


Paid vs Unpaid

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

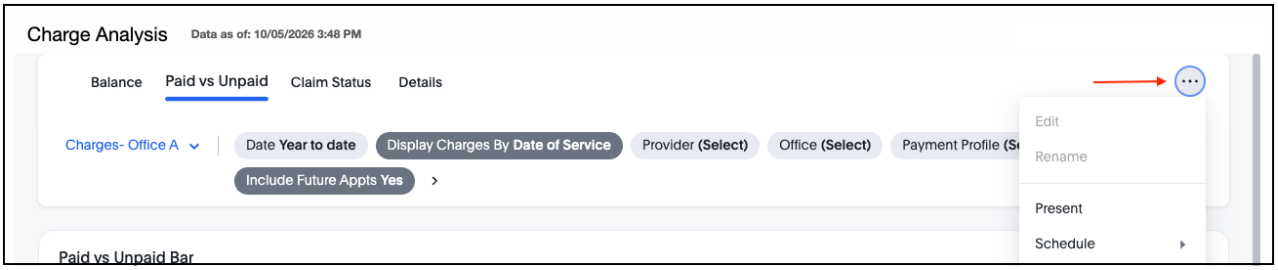
The Paid vs Unpaid tab allows you to see charges as:

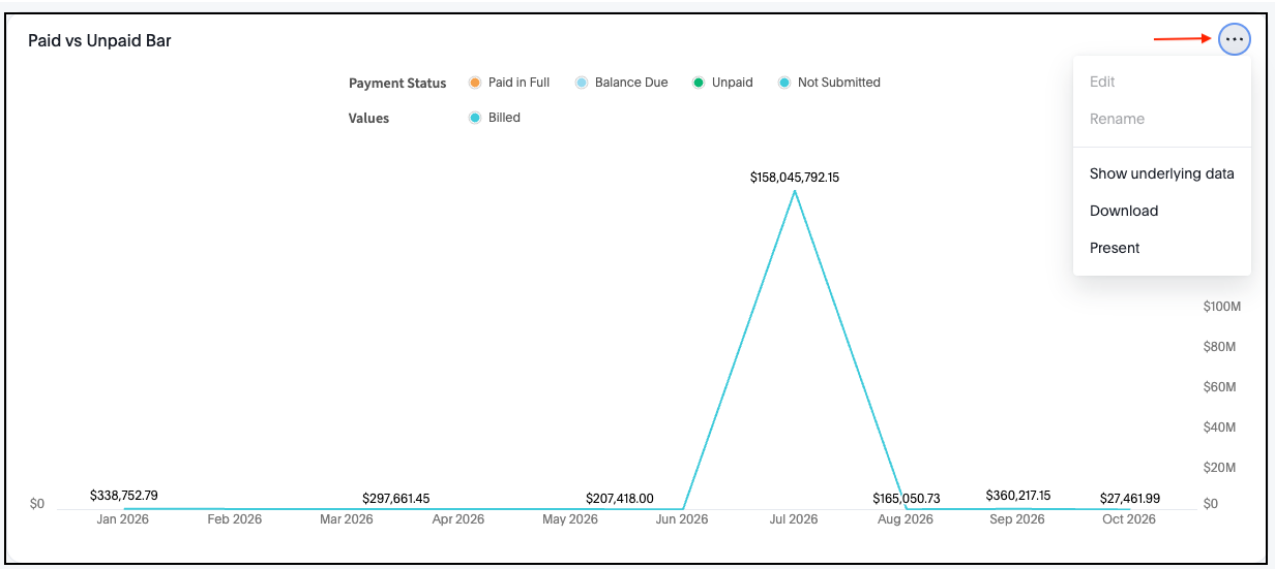
- Total Billed
- Unpaid dollar amount
- Paid in Full dollar amount
- Not Submitted dollar amount
- Balance due amount

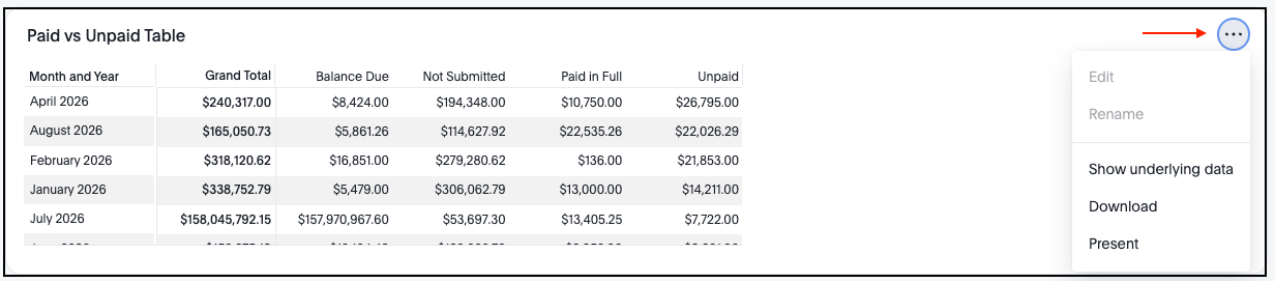


Month and Year	Grand Total	Balance Due	Not Submitted	Paid in Full	Unpaid
April 2026	$240,317.00	$8,424.00	$194,348.00	$10,750.00	$26,795.00
August 2026	$165,050.73	$5,861.26	$114,627.92	$22,535.26	$22,026.29
February 2026	$318,120.62	$16,851.00	$279,280.62	$136.00	$21,853.00
January 2026	$338,752.79	$5,479.00	$306,062.79	$13,000.00	$14,211.00
July 2026	$158,045,792.15	$157,970,967.60	$53,697.30	$13,405.25	$7,722.00

Pressing the three horizontal dots in the top right corner of each tile will expose options to schedule the report to run on a preset cadence, download the information, view underlying data, or view in presentation mode.







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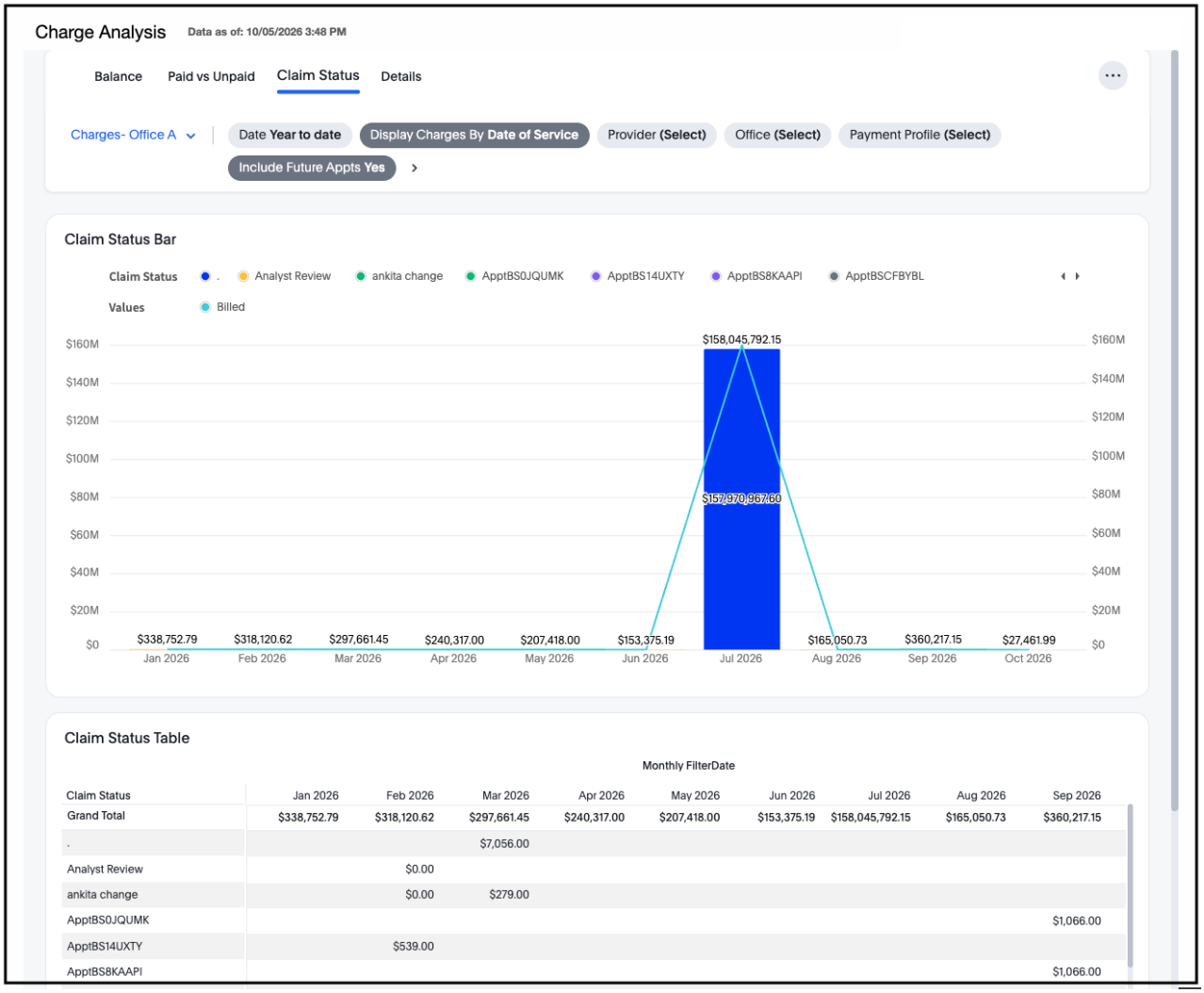
Claim Status

The third tab displays claim dollars categorized by claim status.



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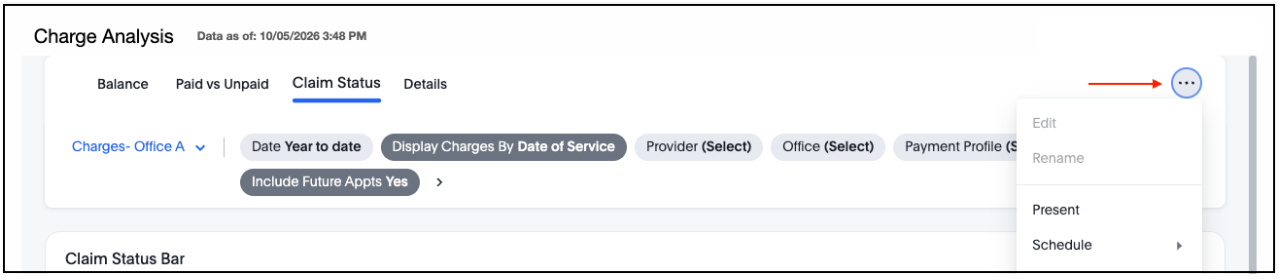
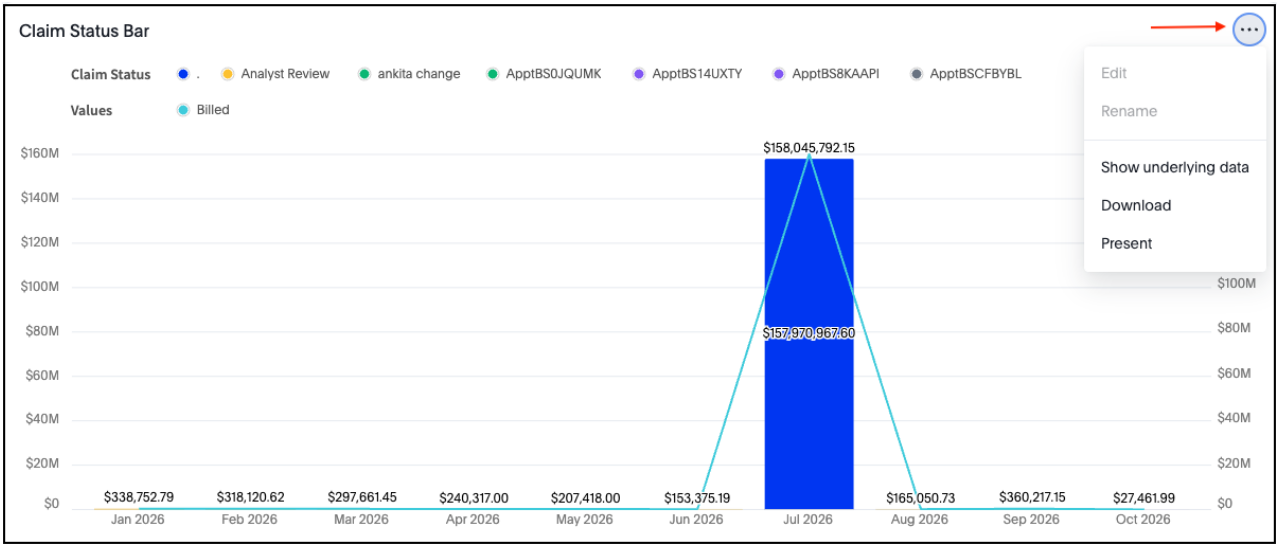
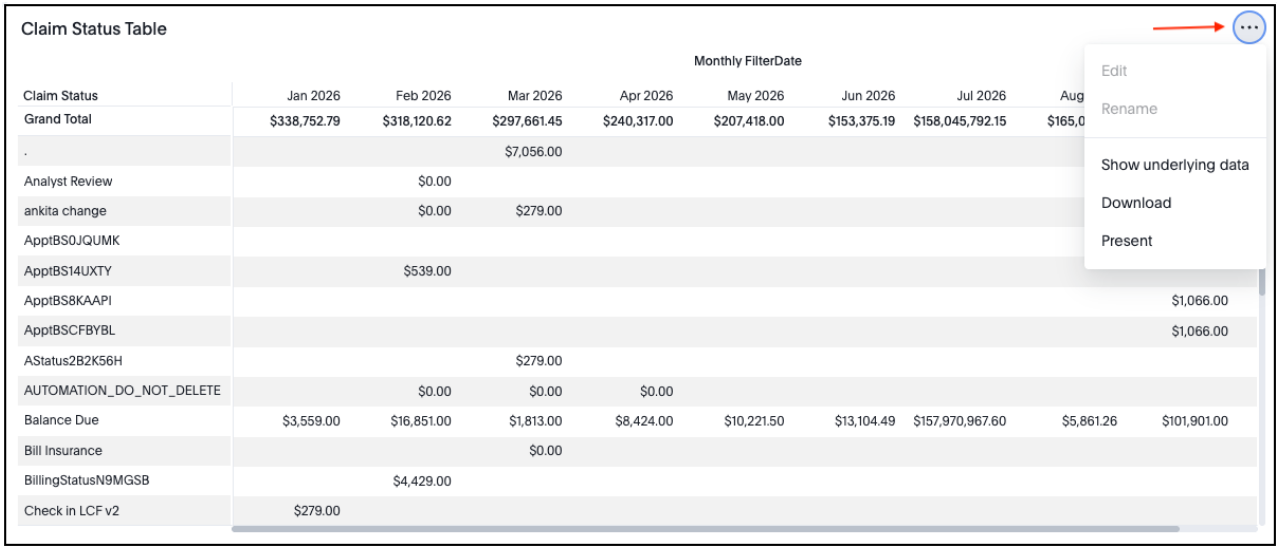


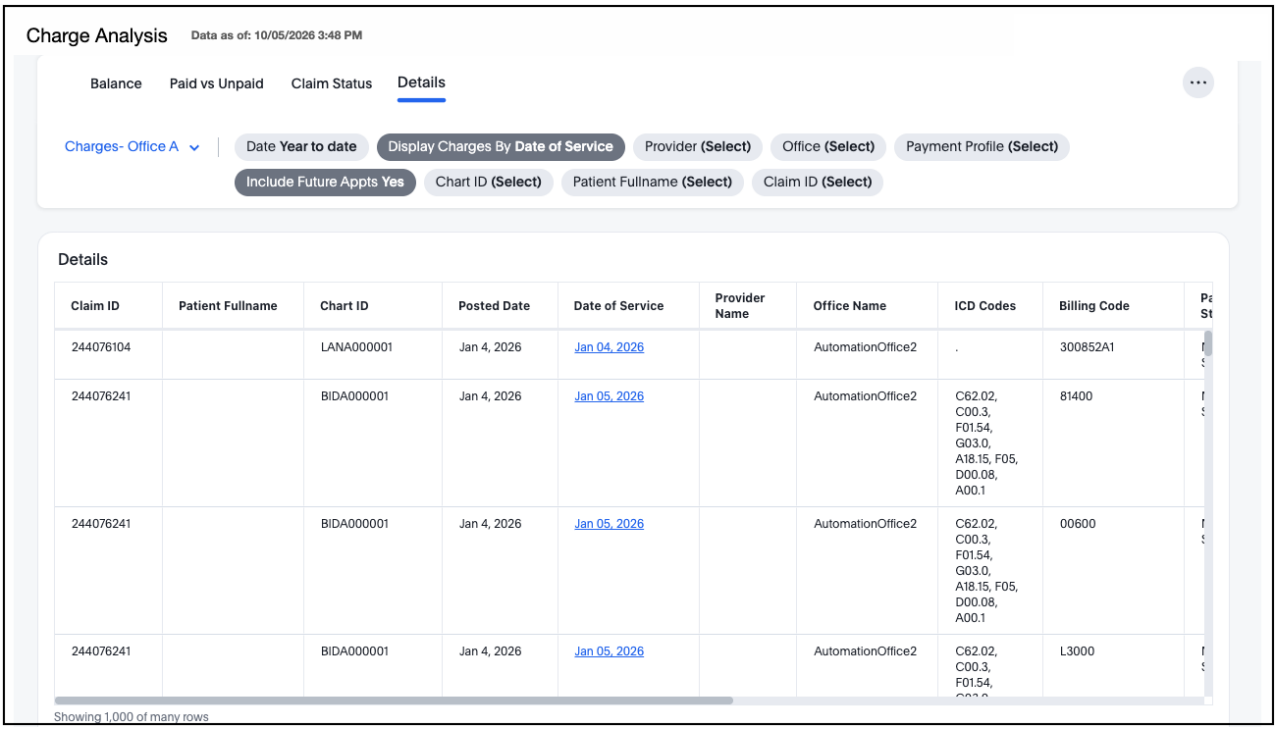




Claim Status	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	Jun 2026	Jul 2026	Aug	
Grand Total	**$338,752.79**	**$318,120.62**	**$297,661.45**	**$240,317.00**	**$207,418.00**	**$153,375.19**	**$158,045,792.15**	**$165,0**	
.			$7,056.00						
Analyst Review		$0.00							
ankita change		$0.00	$279.00						
ApptBS0JQUMK									
ApptBS14UXTY		$539.00							
ApptBS8KAAPI									$1,066.00
ApptBSCFBYBL									$1,066.00
AStatus2B2K56H			$279.00						
AUTOMATION_DO_NOT_DELETE		$0.00	$0.00	$0.00					
Balance Due	$3,559.00	$16,851.00	$1,813.00	$8,424.00	$10,221.50	$13,104.49	$157,970,967.60	$5,861.26	$101,901.00
Bill Insurance			$0.00						
BillingStatusN9MGSB		$4,429.00							
Check in LCF v2	$279.00								

Details

The fourth tab displays the detailed information behind the report.



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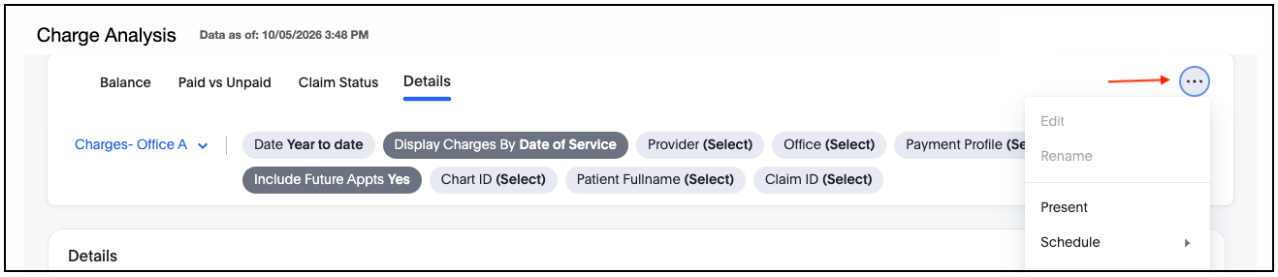

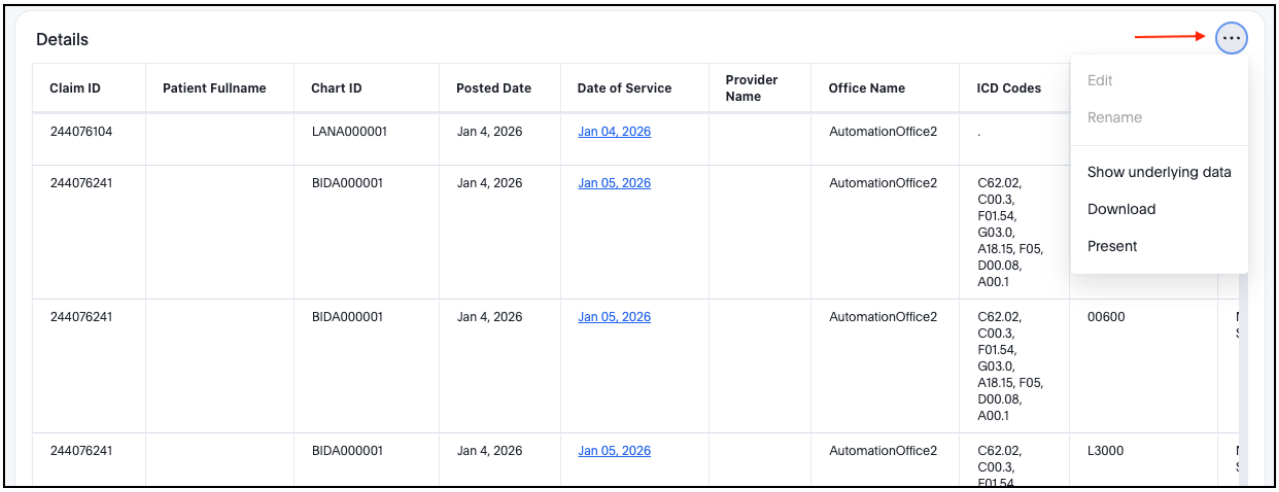

Video Walkthrough