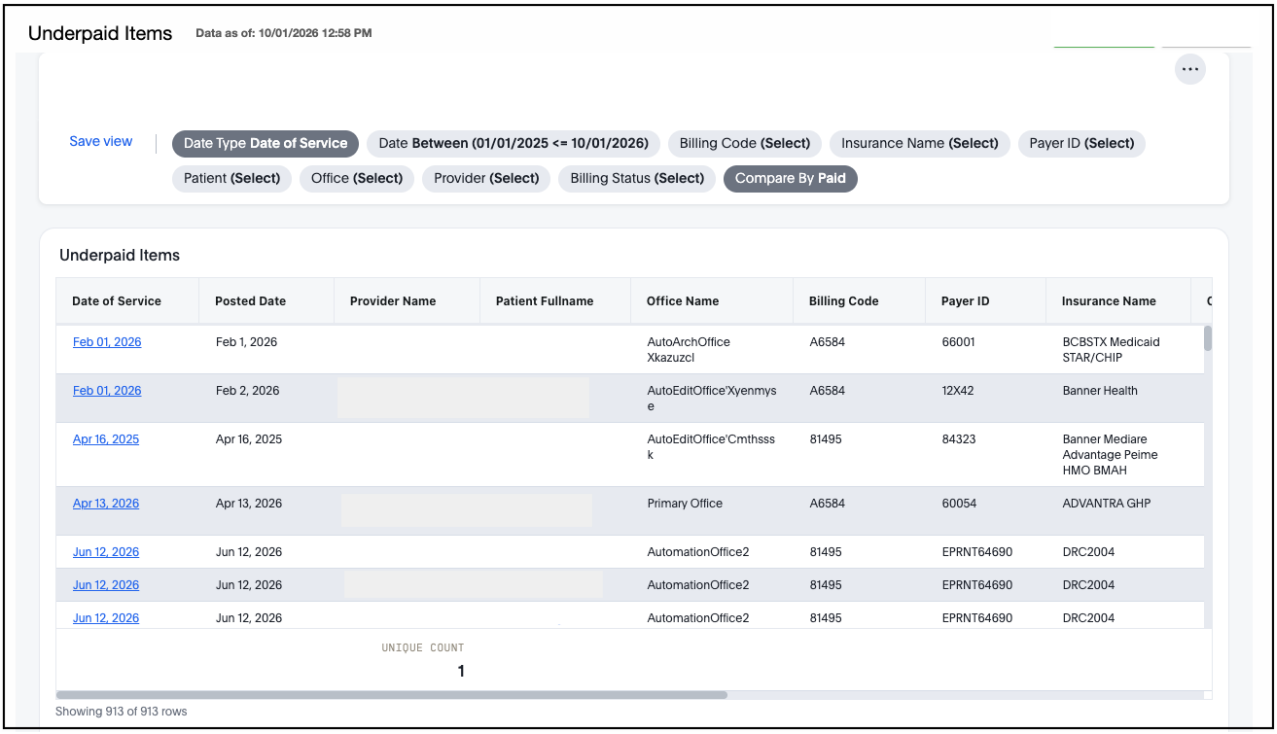
Underpaid Items Report: Running the report

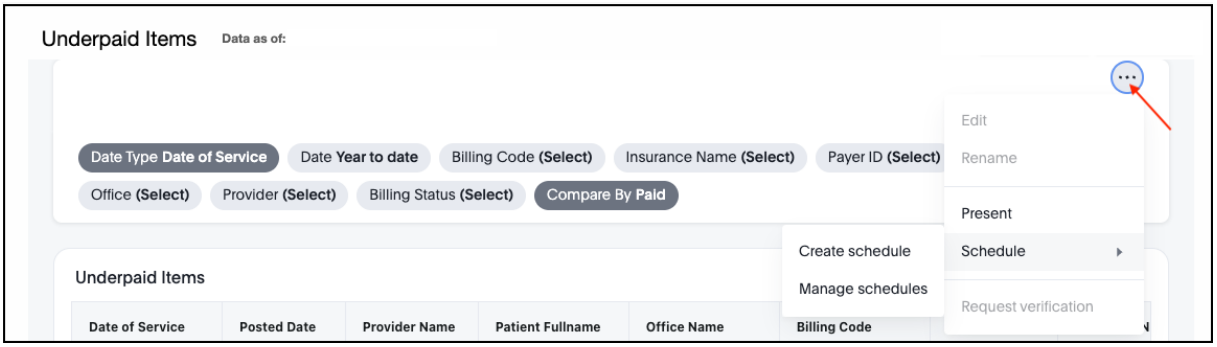
Last modified on 11/10/2026 11:16 am EST



To run the Underpaid Items Report:

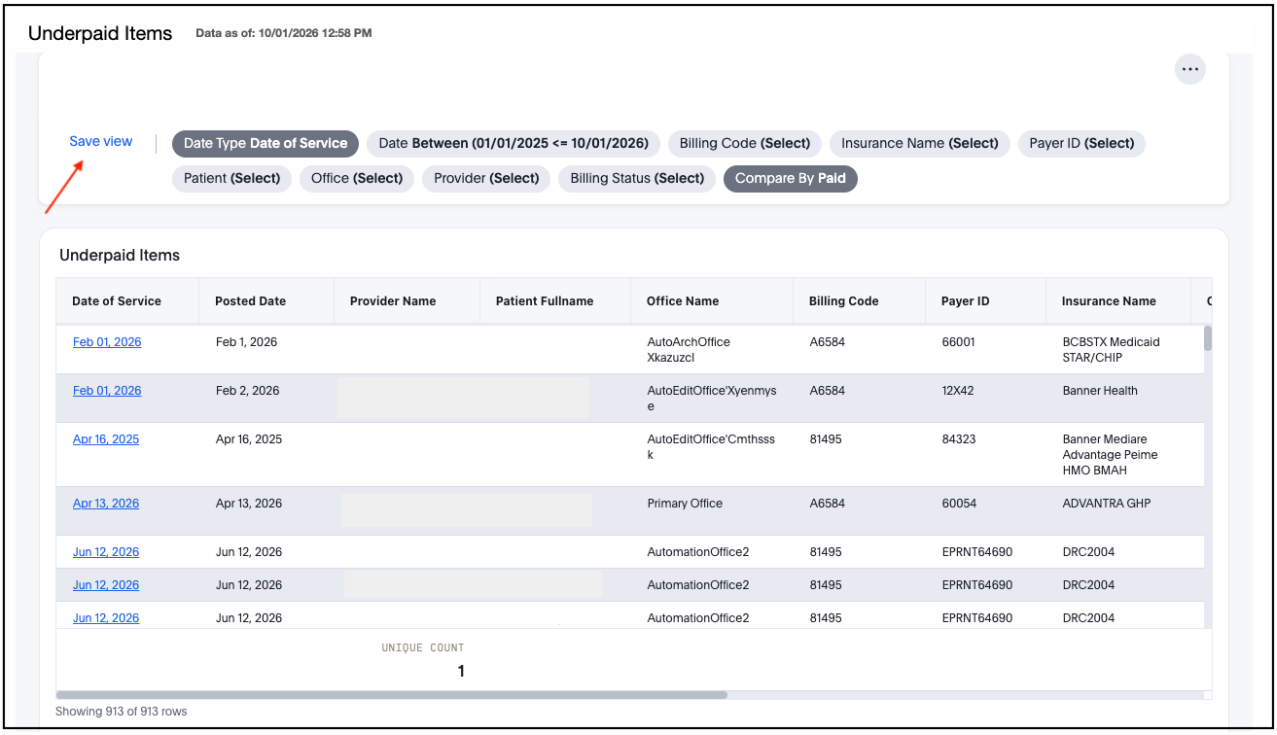
1. Navigate to **Billing > Underpaid Items**
2. Select the parameters for your report from the following options:
    a. **Date Type** - Date of Service or Posted Date
    b. **Date** - Date range, fixed or rolling, of the report
    c. **Billing Code** - Search for a specific CPT/HCPCS, multiple, or all to include or exclude
    d. **Insurance Name** - Search for a specific company, multiple, or all to include or exclude
    e. **Payer ID** - Search for a specific payer ID, multiple, or all to include or exclude
    f. **Patient** - Search for a specific patient, multiple, or all to include or exclude
    g. **Office** - Search for a specific office, multiple, or all to include or exclude
    h. **Provider** - Search for a specific provider, multiple, or all to include or exclude
    i. **Billing Status** - Search for the claim's current billing status, multiple statuses, or all to include or exclude
    j. **Compare By** - Select to compare by allowed amount or paid amount
3. The three horizontal dots on the right side will allow you to schedule the report to run on a specific cadence

and email to identified email addresses. It will also allow the information to show on the screen in Present mode to share/discuss the information with others.

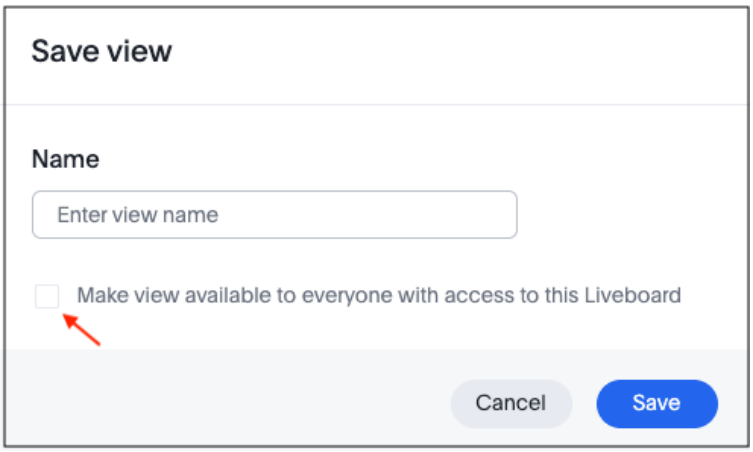


Save View

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

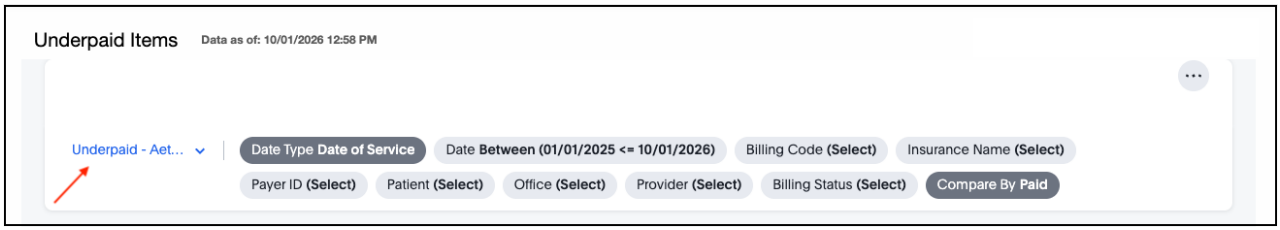


Enter a name for the view when prompted. To share the view with colleagues, check the box next to **Make view available to everyone with access to this Liveboard**.



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 is not showing, press the down arrow for additional saved views.



Drilling into Underlying Data, Downloading and Displaying in Presentation Mode

Pressing the three horizontal dots will expose options to drill into the underlying data, download the report, or display it in presentation mode.



Schedule report to run automatically

Press the three horizontal dots to expose the option to schedule the report to schedule the report to run and email it to you as an attachment. There is an option to manage the schedule as well.

