

Underpaid Items Report: Running the report

Last modified on 04/29/2025 10:20 am EDT

Date of Service	Posted Date	Provider Name	Patient Fullname	Office Name	Billing Code	Payer ID	Insurance Name	Claim ID	Billing ...	Billed
Oct 24, 2023	Oct 25, 2023			Primary Office	10060	62308	Cigna	280169492	Balance Due	\$0.00

To run the Underpaid Items Report:

1. Navigate to **Billing > Underpaid Items**

2. If not expanded, press the down arrow on the right (in the gray area). This should open up your available options.

- Date Type - Date of Service or Posted Date
- Date - Date range of your report
- Billing Code - Search for a specific CPT/HCPCS, multiple, or all of them
- Insurance Name - Search for a specific company, multiple, or all of them
- Payer ID - Search for a specific payer id, multiple, or all of them
- Patient - Search for a specific patient, multiple, or all of them
- Office - Search in a specific office, multiple, or all of them
- Provider - Search for a specific provider, multiple, or all of them
- Billing Status - Search for the claims current billing status, multiple statuses, or all of them
- Compare By - Select to compare by allowed amount or paid amount

3. Pressing in the right corner of the report will present options to maximize the screen, sort the data, or export to CSV or MS Excel.