Provider Level Balance (PLB) Report

Last modified on 11/06/2026 2:05 pm EST

The Provider-level balance (PLB) report provides clear visibility into outstanding receivables by individual provider, enabling more accurate financial oversight and accountability. By breaking balances down at the provider level, billing and finance teams can quickly identify trends such as underpayments, delayed reimbursements, or denial patterns tied to specific providers or services.

This insight supports more targeted follow-up, enhances cash-flow management, and enables leadership to make informed decisions on staffing, contracting, and payer negotiations. Ultimately, provider-level balance reports promote transparency, streamline revenue cycle workflows, and support more predictable and sustainable reimbursement performance.

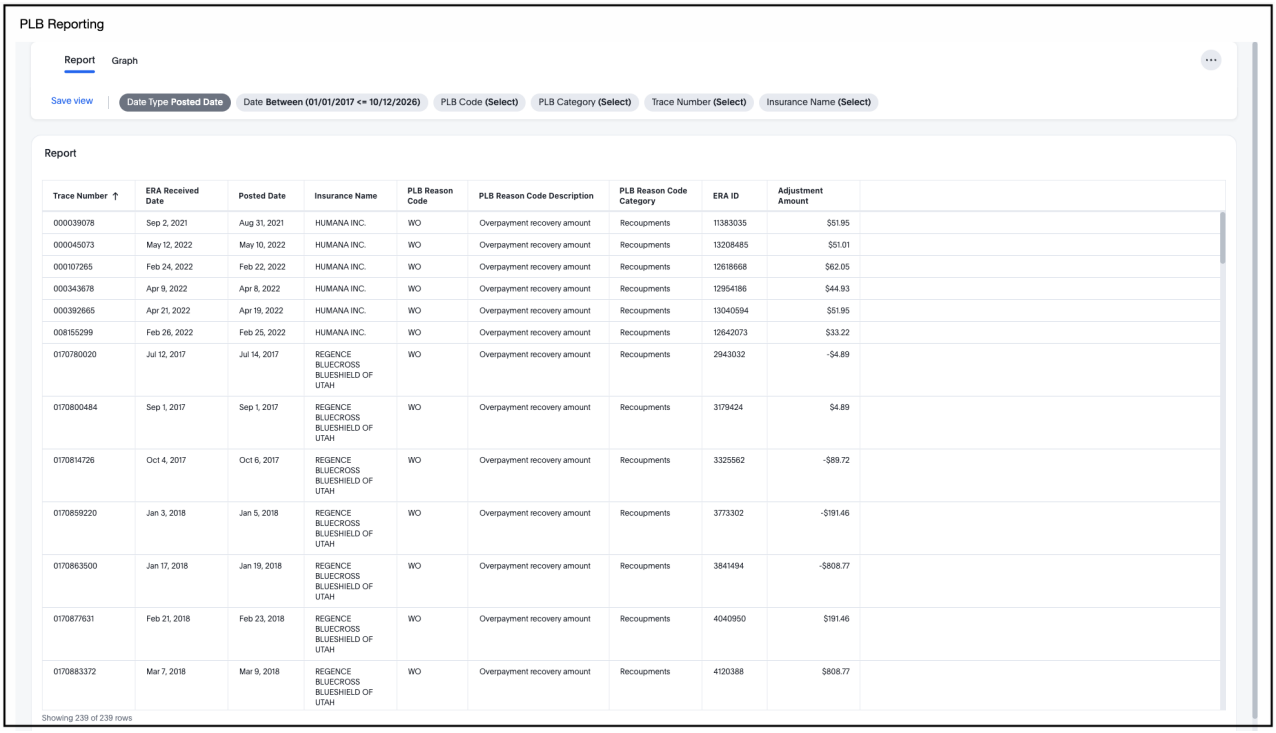
Report | Graph | Save View | Drill into Data | Schedule to Run

Report tab

This tab will let you choose parameters for your report, including:

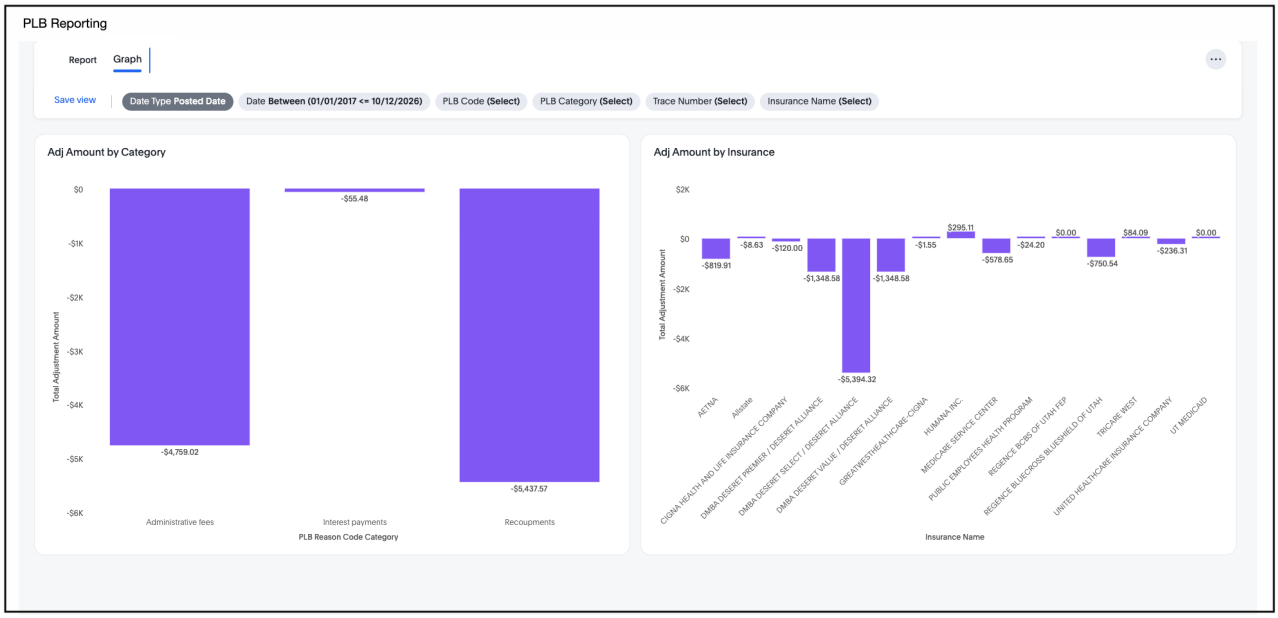
- **Date Type** - ERA Received Date, Posted Date (system/entry date), and Posting Date (accounting/financial date)
- **Date** - Date range for the report
- **PLB Code** - Select a single, multiple, or all PLB Adjustment Codes
- **PLB Category** - Administrative fees, interest payments, recoupments
- **Trace Number** - Identification number assigned by the payer
- **Insurance Name** - Select a single, multiple, or all payers

The Report tab shows detailed information for claims that meet the set parameters.



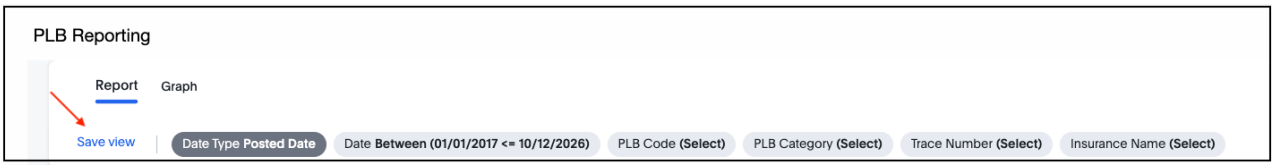
Graph tab

The Graph tab will show the information in two pie charts: Adjustment Amount by Category and Adjustment Amount by Insurance.

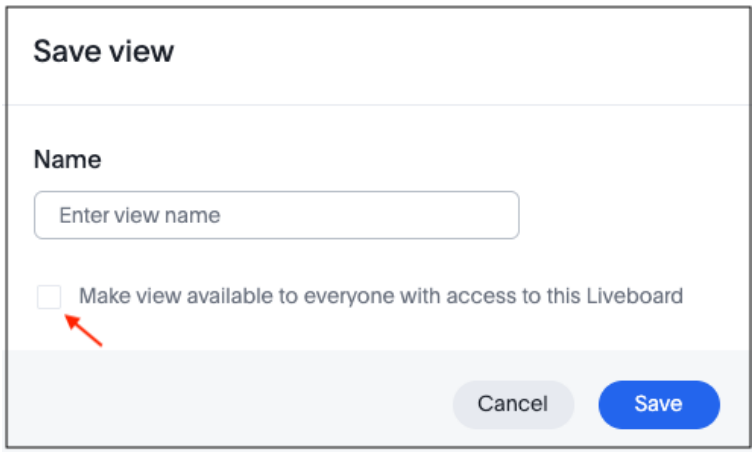


Save View

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**.



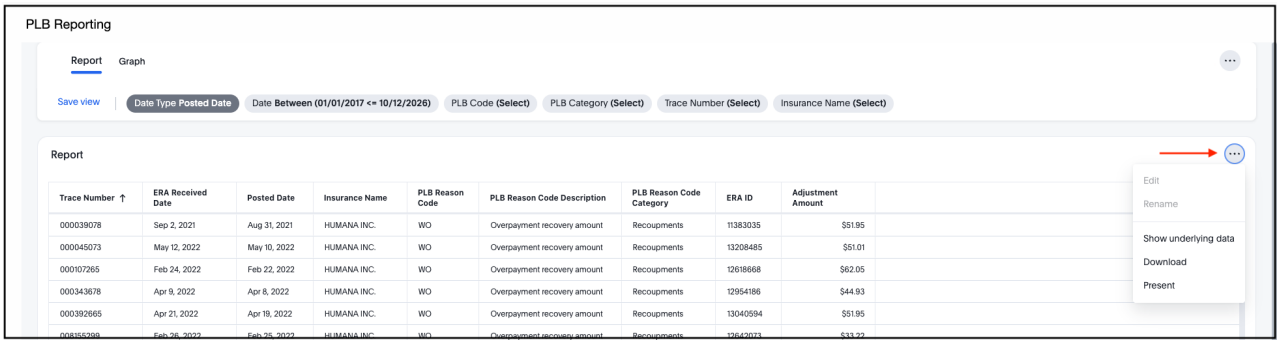
Saved views preserve all filter selections, including date type and grouping. They do not save a specific date range.

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.



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.

