

# Claim Reports

† Modified on 06/27/2024 12:05 pm EDT

## All Patients Seen - Charge Details Report

**Description:** The All Patients Seen - Charge Details Report displays a list of patients that have a charge date of service in a date range. The report shows charge and claim details such as dates, patient information, insured information, charge total adjustments, charge amount, charge insurance payments, charge patient payments, payments transfer amount, and charge balance. The report includes totals at the bottom of the report for any money fields.

**Limitations:** Does not include deleted charges, debits, patients where the insured account number equals zero (0) (non-family account).

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## Charge Overview by Date Range Report

**Description:** The Charge Overview by Date Range Report displays a list of patients that have a charge date of service in a date range. This report shows charge and claim details such as dates, patient information, insured information, charge total adjustments, charge amount, charge insurance payments, charge patient payments, payments transfer amount, and charge balance. The report includes totals at the bottom of the report for any money fields. Additionally, there are co-displays for Totals by Payer, Totals by Payer Type, Totals by Provider, Totals by Facility, and Totals by Office.

**Limitations:** Does not include deleted or incomplete charges.

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## Claim Details Report

**Description:** The Claim Details Report displays a list of claims in a date range. This report shows charge and claim details such as dates, patient information, charge CPT code, charge modifiers, charge diagnosis pointers, charge ICDs, charge amount, and charge units. It also includes grouping options to view the report by.

**Limitations:** Does not include deleted charges.

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## Claim Follow-Up Report

**Description:** The Claim Follow-Up Report displays a list of patients that have a claim follow-up date in a

late range. This report shows claim details such as dates, patient information, patient balance, and patient insurance balance.

**Limitations:** Does not include deleted claims.

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## Claim Process Mode Conflict Report

**Description:** The Claim Process Mode Conflict Report displays a list of claims whose charge status conflict with the payer processing mode. For example, a charge status may say "Sent to Insurance via Clearinghouse" while the payers processing mode says "Do not send claims to the clearinghouse for processing." This report includes claim id, payer name, charge amount, charge status and processing mode

**Limitations:** None.

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## Claims On Hold Report

**Description:** The Claims On Hold Report displays a list of charges that are set to "On Hold." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date the status was changed to "On Hold", followed by totals.

**Limitations:** Does not include debits or deleted charges.

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## Claims Pending Patient Report

**Description:** The Claims Pending Patient Report displays a list of charges that are currently set to "Pending Patient." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date the status was changed, followed by totals.

**Limitations:** Does not include debits or deleted charges.

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## Claims Pending Physician Report

**Description:** The Claims Pending Physician Report displays a list of charges that are currently set to "Pending Physician." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date the status was changed, followed by totals.

**Limitations:** Does not include debits or deleted charges.

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## Claims Printed by the User Report

**Description:** The Claims Printed by the User Report displays a list of claims that have been printed. This report shows claim practice, claim dates, payer name, claim id, patient info, and claim total amount. Additionally, the report shows totals for the claim amount and a co-display for Claims Printed by the Payer.

**Limitations:** Does not include claims where the activity is deleted.

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## Claims Rejected at Clearinghouse Report

**Description:** The Claims Rejected at Clearinghouse Report displays a list of charges that are currently set to "Rejected at Clearinghouse." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date the status was changed, followed by totals.

**Limitations:** Does not include deleted claims.

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## Claims Waiting for Review Report

**Description:** The Claims Waiting for Review Report displays a list of charges that are currently set to "Waiting for Review." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date the status was changed, followed by totals.

**Limitations:** Does not include debits or deleted charges and claims.

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## Claims Waiting to be Printed by User Report

**Description:** The Claims Waiting to be Printed by the User report displays a list of claims that are set to "User Print and Mail to Insurance." this report shows claim id, claim dates, patient info, summed charge amount, and summed charge balance. Additionally, the report shows total claims, charge amount and balance totals, and a co-display for Totals by Payer.

**Limitations:** Does not include deleted claims.

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## Claims Waiting to be Sent to the Clearinghouse Report

**Description:** The Claims Waiting to be Sent to the Clearinghouse report displays a list of claims that are set to "Send to Insurance via Clearinghouse." This report shows practice, payer, patient info, claim id, charge dates, charge amount, payer type, and when the claim was set to this status. Additionally, the report shows totals for claims, charge amount, and a co-display for Summary by Payer.

**Limitations:** Does not include deleted charges. This report includes claims for payers whose server processing mode is set to "Do not send claims to clearinghouse for processing."

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## Electronic Claim Activity Report

**Description:** The Electronic Claim Activity Report displays a list of electronic claim submitted to payers found within a specified date range. This report shows the TCN, patient name, claim id, activity date, claim amount, and claim status message. This report is a reflection of the information available within the Claim Tracking section.

**Limitations:** Does not include deleted claims. Does not include user printed claims.

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## Incomplete Claims Report

**Description:** The Incomplete Claims report displays a list of charges that are currently set to "Incomplete." This report is grouped by Practice and displays charge details such as the patient, payer type, amount and the date that status was changed, followed by totals.

**Limitations:** Does not include debits or deleted charges and claims.

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## First Pass Resolved Claims Report

**Description:** The First Pass Resolved Claims Report displays a list of claims that are resolved on the initial submission's first pass. This report shows patient info, claim ID, charge dates, TCN#, claim activity total amount, primary allowed amount, and times billed. Additionally, the report shows if it was submitted in the first submission and if it was resolved on the first pass.

**Limitations:** Does not include deleted charges. This report only includes first submission claims sent to the primary payer.

