# ›atient Activity

ːt Modified on 07/17/2026 3:22 pm EDT

ʼhe **Patient Activity** will allow you to view a listing of the patient's claim, miscellaneous debit, credit, ʇatement, payment, summary activity and dependents. This includes detailed data and the ability to open laims, checks, and other sections directly from the activity listing. The patient's claims activity is defaulted ɔ list all of the claims, dates, totals, balances and current status of the claims.

**Who can use this feature?**

Any user with the Patient Activity permission.

1. Click any of the arrows to expand the rows to see a detailed listing of the activity data.

    Any negative values will be indicated in red.

2. *Optional*: Use the **View Options** button to filter what information is shown on the activity page.
    1. Use the **Order Claims** drop-down menu to set the order claims should display on the activity pag
    2. **Show Entered Dates**: Show the dates claims or payments were entered.
    3. **Show Expected Revenue and Net Balance**: Show the Expected Revenue and Net Balance (balance net expected or actual contractual adjustments) within Patient Activity. When checked it will display an **Expected Revenue** column in the Claim Activity window, as well as replace the Balance column for a Net Balance Column.
    4. **Summary/Detailed**: This determines how much information will show on the activity page.
    5. Use the **Charge Filter** to select which claims should show on the activity page.
    6. Use the **Show Aging Balance By** drop-down menus to change how the balances should display.
    7. Click **Apply**.
3. *Optional*: Right-click on a line to view additional actions.
    1. **Copy**: Copies the information to your clipboard.
    2. **View Charge History**: View changes made to this charge along with the user who made the change.
    3. **Track Claim**: Opens this claim within the Claim Tracker screen.
    4. **Track Account Credit**: Tracks the payments within the Payment Tracker screen that created the

selected account credit.

5. **Track Statement**: Opens up the selected statement within the Statement Tracker screen
6. **View Payment Plan**: Opens up the payment plan within the Payment Plan screen.
7. **Track Payment**: Opens the selected payment within the Payment Tracker screen.
8. **View EOB**: Opens up the selected payment's EOB for payments and credits created through the ERA auto-apply process.
9. **Print Receipt**: Prints a receipt for the selected patient payment.

4. The Activity page contains a patient's financial information. Click on the corresponding > icon to expand each section:

    1. **Claims**: Displays a list of all claims submitted for the patient, including dates, amounts, balances and status. Click the claim number to open a claim.

        > Click the > icon next to a claim to expand the details of the claim (ICD codes, procedure codes, DOS, Charges, etc.) Expand the claims **Billing Activity** to see the Submission Activity for this claim (TCN, Payer, Submission Type etc.) or expand the **Statement Activity** to see statements sent for this claim.

    2. **Debit Adjustments**: Displays a list of all debit adjustments applied towards the patient account, including dates and descriptions of both the debit, and the credit or balance associated to the debit.
    3. **Unused Account Credits**: Displays a list of all patient, insurance and payment plan credits that have not been fully applied.
    4. **Statement History**: Displays an entire list of statements (paper and electronic) sent to the patient, including the statement amount, dates, status and type of statement sent. Click the Invoice number to track the statement within Statement tracker.
    5. **Payment Plans**: Displays a list of all current and paid Payment Plans including their dates, balances, applied payments and installment amount/dates. Click the Payment Plan link to open the payment plan details.
    6. **Payment History**: Displays a history of all patient payments applied to the patients account, including dates, amounts, source, and charge/claim the payment was applied to.
    7. **Insurance Overpayments**: Displays a list of any insurance payments that resulted in an overpayment, including the entered and received dates along with a description of the payment.
    8. **Summary**: Displays charts and graphs that provide easy to view breakdowns of any outstanding

balances, and payment made towards those balances.

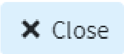
1. **Payment Source Breakdown**: Provides a high-level overview of what has been collected by the patient or from their insurance, and how much has been taken in as adjustments from th insurance. This table also shows how much has been applied from account credits on the patient's account.

2. **Patient Balance Breakdown**: Provides a total of all outstanding Patient Charge Balances, Payment Plan Balances and Account Credits.

3. **Charge Balance Balance Due To**: Provides a grand total of all outstanding charge balances based on the party (patient, insurance, collection) that is responsible for paying. This table also allows users to easily see how available account credits, due patient and insurance, impact the total amount owed.

4. **Charge Status Breakdown**: Provides a grand total of all outstanding charge balances by charge status. This allows users to quickly review where their outstanding balances are "sitting."

5. **Aging Balance Summary**: Provides an aging view of outstanding charges, grouped by what i "due patient" and what is "due insurance." Users can easily change the way the outstanding amounts are grouped by clicking the Aging Balance Summary link and selecting the date to filter by DOS, Entered Date, Last Billed Date, Payment Plan Due Date.

5. Click 

to exit.