

Financial Analytics (PA): Denials

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This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

Version 21.3

Path: Tools tab > Reporting button > Financial Analytics > Denials

When to Use this Report

Use this dashboard as a tool to track and analyze claim denials at the claim and line item level. This dashboard provides a comprehensive view of denied claims by adjustment codes, payers, CPT codes, location, and monthly denial trends. It is powered by **posted ERAs** and driven by adjustment codes classified as 'denials' in the **HIPAA Codes > Claim Adjust Code** library.

The worklist section of the dashboard enables you to view fully adjusted denials, partially adjusted denials, and adjustment codes flagged for review.

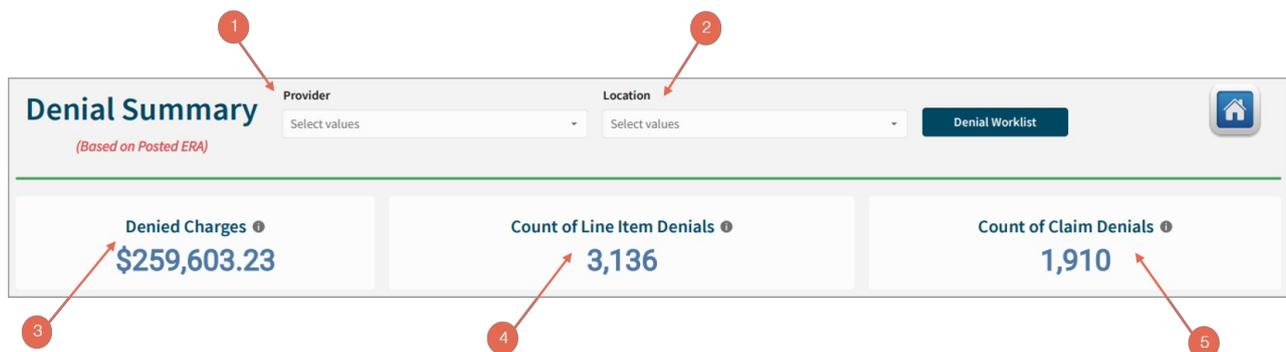
Qualifications/Best Practices

Based on the CARC code (Claim Adjustment Reason Codes) configuration. Dashboard is looking to the HL7 setup and which codes are set to a match status of 'Denied'.

About Denial Summary and Worklist

- Denial Summary Filters and Summary Tiles
- Denial Summary Overview
- Denial Worklist
- Denial Worklist Filters
- Denial Worklist Reports

Denial Summary Filters and Summary Tiles

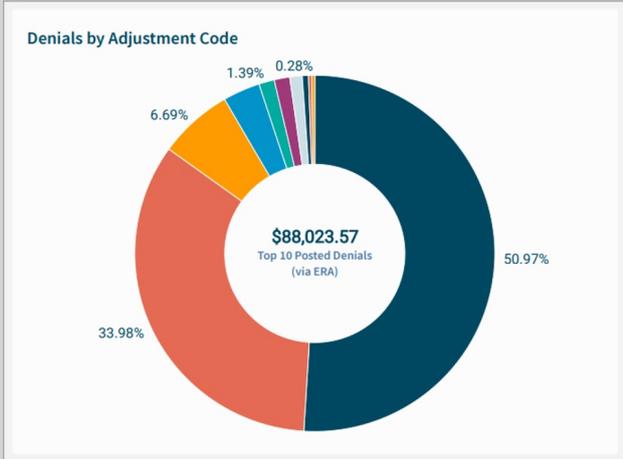
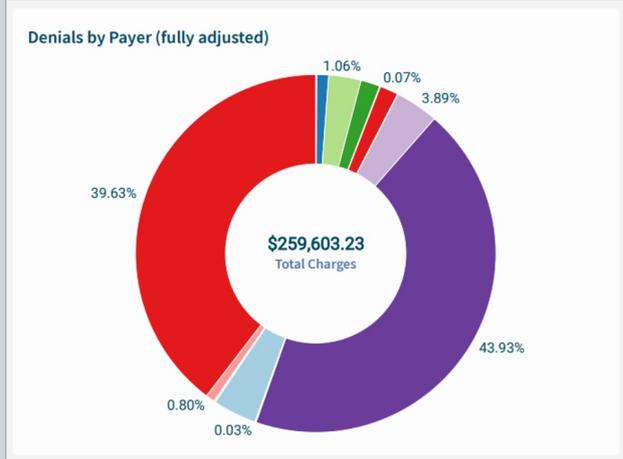


The screenshot shows the Denial Summary dashboard interface. At the top, there are two dropdown menus for 'Provider' and 'Location', both with 'Select values' text. A 'Denial Worklist' button is located to the right of these menus. Below the filters, there are three summary tiles: 'Denied Charges' with a value of \$259,603.23, 'Count of Line Item Denials' with a value of 3,136, and 'Count of Claim Denials' with a value of 1,910. A home icon is visible in the top right corner of the dashboard area.

Category	Value
Denied Charges	\$259,603.23
Count of Line Item Denials	3,136
Count of Claim Denials	1,910

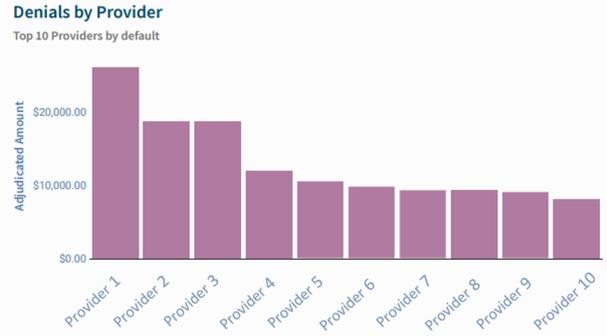
Number	Section	Description
1	Provider	Use this filter to select a provider(s) associated with the transactions.
2	Location	Use this filter to select the Location(s) of the associated transactions.
3	Denied Charges	This summary tile shows the dollar amount of charges associated with a denied adjustment code (defaults to the last 90 days by DOS).
4	Count of Line Item Denials	This summary tile counts the number of denied lines at the CPT level (defaults to the last 90 days by DOS).
5	Count of Claim Denials	This summary tile counts the number of denied lines at the Claim level (defaults to the last 90 days by DOS).

Denial Summary Overview

Denials by Adjustment Code	Denials by Payer (fully adjusted)														
<p>Type of report: Pie Chart</p> <p>Displays: This shows the top 10 denials by adjustment code posted during ERA processing .</p> <p>Details: Hover over each section to see the specific adjustment codes.</p>	<p>Type of report: Pie Chart</p> <p>Displays: Top 10 denials by payer and summed adjudicated amount.</p> <p>Details: Hover over each section to see the specific payers.</p>														
 <p>Denials by Adjustment Code</p> <p>\$88,023.57 Top 10 Posted Denials (via ERA)</p> <table border="1"> <caption>Top 10 Denials by Adjustment Code</caption> <thead> <tr> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>50.97%</td></tr> <tr><td>33.98%</td></tr> <tr><td>6.69%</td></tr> <tr><td>1.39%</td></tr> <tr><td>0.28%</td></tr> </tbody> </table>	Percentage	50.97%	33.98%	6.69%	1.39%	0.28%	 <p>Denials by Payer (fully adjusted)</p> <p>\$259,603.23 Total Charges</p> <table border="1"> <caption>Top 10 Denials by Payer (fully adjusted)</caption> <thead> <tr> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>43.93%</td></tr> <tr><td>39.63%</td></tr> <tr><td>3.89%</td></tr> <tr><td>1.06%</td></tr> <tr><td>0.80%</td></tr> <tr><td>0.07%</td></tr> <tr><td>0.03%</td></tr> </tbody> </table>	Percentage	43.93%	39.63%	3.89%	1.06%	0.80%	0.07%	0.03%
Percentage															
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1.06%															
0.80%															
0.07%															
0.03%															
Denials by Provider	Denials by CPT														
<p>Type of report: Bar Graph</p> <p>Displays: This shows the top 10 denials by provider and summed adjudicated amount.</p> <p>Details: Hover over each bar to see the specific adjudicated amount.</p>	<p>Type of report: Line Chart</p> <p>Displays: This shows the top 10 denials by CPT and summed adjudicated amount, as well as the total denials.</p> <p>Details: Hover over each CPT code to see the specified denial charges.</p>														

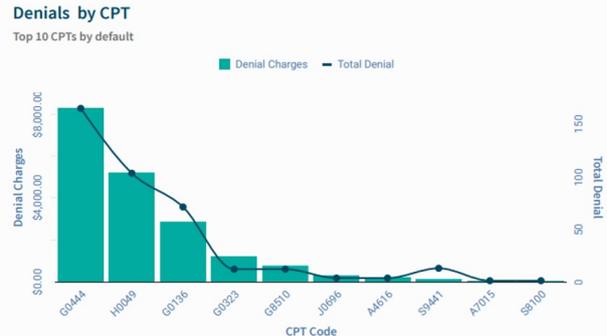
Denials by Provider

Top 10 Providers by default



Denials by CPT

Top 10 CPTs by default



Denied Charges MoM Trend

Type of report: Line Chart
Displays: This shows the Month over Month denial trends by denied charges.
Details: Hover over each point to see details. Also shows the percent trend over month.

Denials by Location

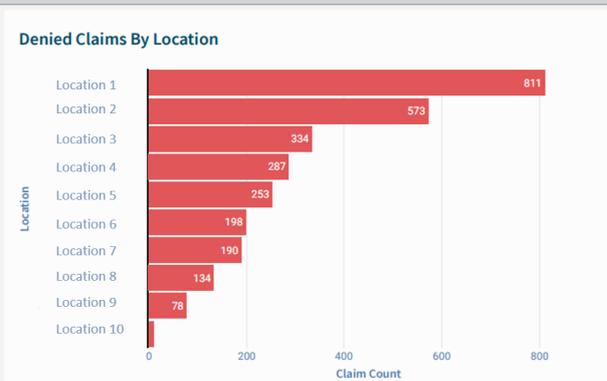
Type of report: Bar Graph
Displays: This shows the denials by location and summed adjudicated amount.
Details: Shows the top ten locations by default.

Denied Charges MoM Trend

\$118,937
 ↑ 19.8% Aug vs Jul, 2024



Denied Claims By Location



Denial Worklist

Denial Worklist Filters

Denial Worklist

(Based on Posted ERA)

1

Date of Service

2

Provider

3

Payer

4

Location

Number	Section	Description

1	Date of Service	Use this filter to select the date(s) you wish to search based on the date of service. See the Dates section of the Filter Tutorial article for the different selections.
2	Provider	Use this filter to select a provider(s) associated with the transactions.
3	Payer	Use this filter to select the Payer(s) associated transactions.
4	Location	Use this filter to select the Location(s) of the associated transactions.

Denial Worklist Reports

The Worklist filters at the top of the page will be applied to all worklist reports. You can also filter further in each worklist by Adjustment Code, CPT Category, Patient, and/or Claim number.

Fully Adjusted Denials

Displays: This is a worklist of all line items posted via ERA and have an adjustment code that is marked as denied in the HIPAA Codes library and the line item balance is at \$0.

Details:

- Filter by Adjustment Code, CPT Category, Patient, and/or Claim #.
- The Summary shows the Total Adjusted for all line items pulled in the filtered report.

Fully Adjusted Denials		Adjustment Code	CPT Category	Patient	Claim #															
		Select values	Select values	Select values	Select values															
Claim #	Billed Amount	Adj Balance	Transx Type	CPT Code	Adj Code	Adj Reas...	Claim Note	Payer	Remark Code	Date of Service	Itxn #	llineitem #	CPT Category	Insurancecategory	Visit Type	Posted Date	Adj Code 2	Adj Reason 2	Match	Action
8752...	\$30.00	\$30.00	\$0.00	A	96110	A1	Claim ... 7-14-22...	GVO ...	N448	07/11/2022	6460199	6445026	WELLVISIT	Medicaid		07/14/2022	null	null	7	
	\$40.00	\$40.00	\$0.00	A	99174	A1	Claim ... 7-14-22...	GVO ...	N448	07/11/2022	6460200	6445027	PROCEDURE	Medicaid		07/14/2022	null	null	7	
8945...	\$30.00	\$30.00	\$0.00	A	36416	147	Provid... 12-18-2...	GUZ ...	null	09/27/2022	6817229	6676134	PROCEDURE	Medicaid		10/04/2022	null	null	7	
	\$30.00	\$30.00	\$0.00	A	96110	18	Duplic... 12-18-2...	GUZ ...	null	09/27/2022	6802414	6676156	WELLVISIT	Medicaid		10/04/2022	null	null	7	
	\$40.00	\$40.00	\$0.00	A	90647	18	Duplic... 12-18-2...	GUZ ...	null	09/27/2022	6802408	6676144	VACCINE	Medicaid		10/04/2022	null	null	7	
	\$40.00	\$40.00	\$0.00	A	99174	18	Duplic... 12-18-2...	GUZ ...	null	09/27/2022	6802409	6676148	PROCEDURE	Medicaid		10/04/2022	null	null	7	
	\$80.00	\$80.00	\$0.00	A	90461	18	Duplic... 12-18-2...	GUZ ...	null	09/27/2022	6802406	6676136	OTHER	Medicaid		10/04/2022	null	null	7	
	\$290.00	\$290...	\$0.00	A	90670	18	Duplic... 12-18-2...	GUZ ...	null	09/27/2022	6802407	6676142	VACCINE	Medicaid		10/04/2022	null	null	7	
8988...	\$30.00	\$30.00	\$0.00	A	96110	252	An att... 2-7-23: 9...	UN3 ...	M60	10/21/2022	6724169	6714751	WELLVISIT	Medicaid		10/24/2022	null	null	7	
9047...	\$30.00	\$30.00	\$0.00	A	96110	252	An att... 12-29-2...	UN3 ...	M60	11/08/2022	6785450	6755517	WELLVISIT	Medicaid		11/15/2022	null	null	7	
9087...	\$30.00	\$30.00	\$0.00	A	96110	A1	Claim ... null	GVO ...	N448	11/28/2022	6822182	6791028	WELLVISIT	Medicaid		12/05/2022	null	null	7	
	\$40.00	\$40.00	\$0.00	A	99174	A1	Claim ... null	GVO ...	N448	11/28/2022	6822183	6791030	PROCEDURE	Medicaid		12/05/2022	null	null	7	
9165...	\$40.00	\$40.00	\$0.00	A	99174	A1	Claim ... 06-19-2...	GVO ...	N448	01/02/2023	6894061	6875076	PROCEDURE	Medicaid		01/09/2023	null	null	7	
SUMMARY		\$832,871.25																		
14,409 rows - 22 columns		Total Adjusted																		

Partially Adjusted Denials

Displays: This is A worklist of all line items posted via ERA and have an adjustment code that is marked as denied in the HIPAA Codes library and the line item balance is > \$0..

Details:

- Filter by Adjustment Code, CPT Category, Patient, and/or Claim #.
- Summary Amounts: The Summary amounts at the bottom are the totals for each of the respective columns of all line items pulled in the filtered report.

Partially Adjusted Denials

Adjustment Code: CPT Category: Patient: Claim #:

Claim #	Billed Amount	Paid	Balance	Transx Type	CPT Code	Adj Code	Adj Reason Description	Note	Payer
912755	\$175.00	\$20.00	\$155.00	P	99214	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	01-11-24 Payment-Submitted to GUZ via OP in...	AE1 AET...
924512	\$150.00	\$5.57	\$144.43	P	99213	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	12-05-23 urement-Submitted to GUZ via OP...	AE1 AET...
929186	\$30.00	\$13.80	\$16.20	A	87880	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	03-08-24 JB submitted to GUZ via OP in adj...	BC FLORI...
	\$175.00	\$50.49	\$124.51	A	99214	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	03-08-24 JB submitted to GUZ via OP in adj...	BC FLORI...
	\$175.00	\$124.51	\$50.49	P	99214	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	03-08-24 JB submitted to GUZ via OP in adj...	BC FLORI...
	\$30.00	\$16.20	\$13.80	P	87880	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	03-08-24 JB submitted to GUZ via OP in adj...	BC FLORI...
943591	\$175.00	\$30.00	\$145.00	P	99214	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	04-15-24 PAID. (23). JAC. 5-11-23: Co-pa...	UH1 UNIT...
951297	\$150.00	\$35.88	\$114.12	P	99213	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	11-30-23 utable-Submitted to GUZ via OP in ...	BC FLORI...
	\$150.00	\$114.12	\$35.88	A	99213	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	11-30-23 utable-Submitted to GUZ via OP in ...	BC FLORI...
954226	\$175.00	\$8.39	\$166.61	P	99214	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	12-05-23 urement-Submitted to GUZ via OP...	AE1 AET...
954785	\$25.00	\$22.97	\$2.03	A	81003	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	12-14-23 2o-payment-Submitted to GUZ via ...	CP5 AMB...
	\$25.00	\$2.03	\$22.97	A	81003	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	12-14-23 2o-payment-Submitted to GUZ via ...	CP5 AMB...
	\$150.00	\$80.97	\$69.03	A	99203	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	01-03-24 yment-Submitted hardcopy to GU...	BC FLORI...
956321	\$150.00	\$46.15	\$103.85	P	99203	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	01-03-24 yment-Submitted hardcopy to GU...	BC FLORI...
	\$80.00	\$56.00	\$24.00	A	90461	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	10-16-23 2 shows take back of \$23.76. JAC...	CP5 AMB...
956741	\$80.00	\$24.00	\$56.00	P	90461	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	10-16-23 2 shows take back of \$23.76. JAC...	CP5 AMB...
	\$80.00	-\$56.00	\$24.00	A	90461	23	Payment adjusted due to the impact of prior payer(s) adjudication inc...	10-16-23 2 shows take back of \$23.76. JAC...	CP5 AMB...
SUMMARY			\$206,333.34		\$78,481.51		\$126,397.15		
1,282 rows - 23 columns		Total Billed Amount	Total Paid	Total Balance					

Review ERA Match Status

Type of report Bar Graph

Displays: A worklist of all line items posted via ERA and have an adjustment code that is marked as "Review" in the HIPAA Codes library .

Details:

- Filter by Adjustment Code, CPT Category, Patient, and/or Claim #.
- Summary Amounts: The Summary amounts at the bottom are the totals for each of the respective columns of all line items pulled in the filtered report.

Review ERA Match Status

Adjustment Code: CPT Category: Patient: Claim #:

Claim #	Billed Amount	Adjudicated	Bal	Transx Type	CPT Code	Adj Code	Adj Reason Description	Claim Note
839005	\$35.00	\$35.00	\$0.00	A	90686	96	Non-covered charge(s).	11-17-23: PAID. JAC. 11-11-22 PARENT NEEDS TO COMPLETE COB WL...
865207	\$180.00	\$180.00	\$0.00	A	90716	96	Non-covered charge(s).	12-18-23: GUZ EFT 122550319231216 paid \$17.97 for 99382. JAC. 8-1...
875276	\$90.00	\$90.00	\$0.00	A	90633	97	Payment is included in the allowance for another service/procedure.	7-14-22: Transmitted. Azza.
904209	\$175.00	\$175.00	\$0.00	A	99214	97	Payment is included in the allowance for another service/procedure.	12-20-22: Denied duplicate. Add original ICN & resubmit corrected. JAC...
904764	\$290.00	\$290.00	\$0.00	A	90670	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
	\$40.00	\$40.00	\$0.00	A	90647	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
	\$45.00	\$45.00	\$0.00	A	90713	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
	\$63.00	\$63.00	\$0.00	A	90744	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
	\$75.00	\$75.00	\$0.00	A	90700	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
	\$150.00	\$150.00	\$0.00	A	90681	96	Non-covered charge(s).	12-29-23: Denied again duplicate. JAC. 1-4-23: Denied as duplicate. Add...
908781	\$95.00	\$95.00	\$0.00	A	90707	97	Payment is included in the allowance for another service/procedure.	null
	\$180.00	\$180.00	\$0.00	A	90716	97	Payment is included in the allowance for another service/procedure.	null
909063	\$75.00	\$75.00	\$0.00	A	90696	97	Payment is included in the allowance for another service/procedure.	null
	\$35.00	\$17.03	\$17.97	A	90686	97	Payment is included in the allowance for another service/procedure.	01-03-24: GV0 EFT 0909317062 shows take back of \$125.41 for 99214. ...
916401	\$35.00	\$17.97	\$17.03	P	90686	97	Payment is included in the allowance for another service/procedure.	01-03-24: GV0 EFT 0909317062 shows take back of \$125.41 for 99214. ...
	\$75.00	\$75.00	\$0.00	A	90686	97	Payment is included in the allowance for another service/procedure.	06-21-24: GV0 EFT 0909317062 shows take back of \$116.36 for 99382.
SUMMARY			\$4,282,363.05		\$4,257,750.68		\$13,786.37	
33,486 rows - 23 columns		Total Billed Amount	Total Adjudicated	Total Balance				