

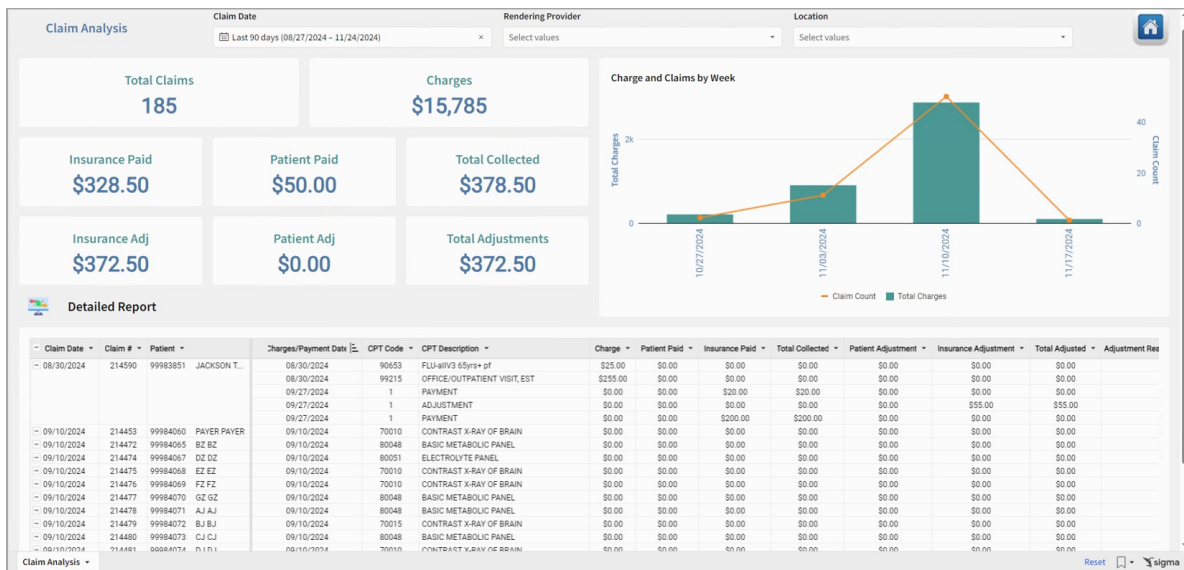
Daily Reports: Claim Analysis

Last Modified on 11/25/2024 2:33 pm EST

Version 21.3

When to Use this Report

Use this report to view all transactions associated with a claim. This is similar to the Transaction Analysis, but you search by Claim Date instead of Charge/Payment date. This allows you to view all claims created within that time frame. Below each claim, you can see all charges, payments and adjustments made against that claim, regardless of the date associated with the charge, payment or adjustment.



About Daily Reports: Claim Analysis

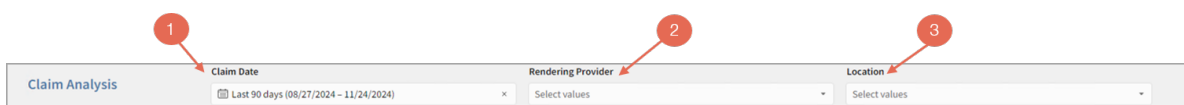
Path: Tools > Reporting > Daily Reports > Claim Analysis

Daily Reports: Claim Analysis Map

Hover over each of the Summary Tiles, to see specific data. For instructions on how to drill down and expand that information from the Summary Tiles, please see the [Drill Down](#) section of the [Data Element Tutorial](#).

Note: All columns in the Detailed Report section will show by default. To hide columns, see the [Visualization](#) section of the [Maximized Elements](#) article.

Filters and Summary Tiles





Number	Section	Description
1	Claim Date	This is the date the claim was created. Select the date(s) for the displayed record's date range. Items that meet the criteria and fall within the selected date range will appear in the detailed reports grid. See the Dates section of the Filter Tutorial article for the different selections.
2	Rendering Provider	Select the Rendering Provider to filter the data by the claims created by a specific or multiple provider(s).
3	Location	Select the Location, if your practice is multi-location, to filter the data by claims at a specific or multiple location(s).
4	Total Claims	This Summary tile displays the total number of claims identified by the filters you selected above.
5	Charges	The Charges Summary Tile displays the total amount of charges for the combined services rendered.
6	Insurance Paid	This Summary tile shows the total total amount paid by the insurance in the filtered report (totals from the Insurance Paid column).
7	Insurance Adjustments	The Insurance Adjustments Summary tile displays total of all Insurance Adjustment transactions with the processed daysheets (total from the Insurance Adjustment column).
8	Patient Paid	This Summary tile shows the total total amount paid by the patients in the filtered report (totals from the Patient Paid column).
9	Patient Adjustments	The Patient Adjustments Summary tile displays total of all Patient Adjustment transactions with the processed daysheets (total from the Patient Adjustment column).
10	Total Collected	The Total Collected Summary tile displays the total of the Insurance Paid and Patient Paid tiles.
11	Total Adjustments	The Total Adjustments Summary tile displays the total of the Insurance Adjustments and Patient Adjustments tiles.

Detailed Report

a	b	c	d	e	f	g	h	i	j	k	l	m	n
Claim Date	Claim #	Patient	Charges/Payment Date	CPT Code	CPT Description	Charge	Patient Paid	Insurance Paid	Total Collected	Patient Adjustment	Insurance Adjustment	Total Adjusted	Adjustment Rate
08/30/2024	214590	99983851 JACKSON T...	08/30/2024	90453	FLU-antiv 45hr+pf	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
08/30/2024			08/30/2024	99215	OFFICE/OUTPATIENT VISIT, EST	\$255.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024			09/27/2024	1	PAYMENT	\$0.00	\$0.00	\$20.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024			09/27/2024	1	ADJUSTMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$55.00	\$55.00	\$55.00
09/10/2024			09/27/2024	1	PAYMENT	\$0.00	\$0.00	\$200.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214453	99984060 PAYER PAYER	09/10/2024	70010	CONTRAST X-RAY OF BRAIN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214472	99984065 EZ BZ	09/10/2024	80048	BASIC METABOLIC PANEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214474	99984067 DZ DZ	09/10/2024	80051	ELECTROLYTE PANEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214475	99984068 EZ EZ	09/10/2024	70010	CONTRAST X-RAY OF BRAIN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214476	99984069 FZ FZ	09/10/2024	70010	CONTRAST X-RAY OF BRAIN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214477	99984070 GZ GZ	09/10/2024	80048	BASIC METABOLIC PANEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214478	99984071 AJ AJ	09/10/2024	80048	BASIC METABOLIC PANEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214479	99984072 BJ BJ	09/10/2024	70015	CONTRAST X-RAY OF BRAIN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214480	99984073 CJ CJ	09/10/2024	80048	BASIC METABOLIC PANEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
09/10/2024	214481	00864074 D D 1	09/10/2024	70010	CONTRAST X-RAY OF BRAIN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Number	Section	Description
a	Claim Date	This column displays the date the claim was created.
b	Claim #	This column displays the Claim #.
c	Patient	The Patient column displays the patient's first and last name and the patient identifier for the indicated transaction.
d	Charges/Payment Date	This column displays the date the charges/payment was created.
e	CPT Code	The CPT code column lists the medical code for the visit on the date of service.
f	CPT Description	This column shows the description of the CPT code.
g	Charge	The Charge column displays the total charges from the provider for the selected transaction.
h	Patient Paid	The Patient Pay column displays the total amount paid by the patient.
i	Insurance Paid	The Insurance Paid column displays the amount paid by the insurance carrier.
j	Total Collected	The Total Collected column displays the total amount paid by the insurance carrier and the patient (adding the Insurance Paid column and Patient Paid column together).
k	Patient Adjustment	The Patient Adjustment column indicates the amount the patient was adjusted.
l	Insurance Adjustment	The Insurance Adjustment column indicates the amount the insurance adjusted.
m	Total Adjusted	This column displays the total amount adjusted for both the insurance carrier and the patient (adding the Patient Adjustment and Insurance Adjustment columns together).
n	Adjustment Reason	The reason the adjustment is being made for either the payer or the patient.