

Down-Coding Report Advanced Search

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Selecting **Advanced Search** from the top-right of the report opens a flexible, query-style view that lets you group, filter, and drill into your down-coding data. Use the **Hide Criteria** / **Show Criteria** toggle to expand or collapse the search criteria, and use **Print** or **Export to Excel** to save your results. You can also save a configured search as a **Template** so it can be reused later.

The screenshot displays the 'Down-Coding Report: Advanced Search' interface. At the top, there are navigation options like 'This Month' and date pickers for '06/01/2026' and '06/17/2026'. A 'Hide Criteria' button is visible. The search criteria section includes dropdowns for 'Date Type' (Post Date), 'Group By' (Payer), and 'SubGroup By' (Rendering Provider). There are also search boxes for 'Payer', 'Rendering Provider', 'Service Location', 'Financial Class', 'CPT Code', 'CARC Code', and 'Remark Code'. A 'Reset Criteria' button is located at the bottom right of the search section. The results grid below shows the following data:

| Payer | Rendering Provider | Claim Count | Charges | Payments |
|----------------------|-----------------------------|-------------|------------|--------------|
| Blue Advantage MCare | Iqbal M.D., Aamir | 28 | \$6,412.00 | (\$1,256.76) |
| Blue Advantage MCare | Chamberlain M.D., Nathan E. | 17 | \$4,215.00 | (\$259.38) |
| Blue Advantage MCare | Yehmert MD, Hans | 16 | \$3,757.00 | (\$679.10) |
| Blue Advantage MCare | Ginther M.D., Stuart G. | 15 | \$3,495.00 | (\$656.27) |
| Blue Advantage MCare | Meshberger MD, Christopher | 13 | \$3,349.00 | (\$1,411.27) |

Search Criteria

The Search Criteria panel controls how your results are organized and filtered:

- **Date Type:** Determines which date the report uses for the selected period (for example, Post Date).
- **Group By** and **SubGroup By:** Set the primary and secondary groupings for the results grid. Options include Payer, Rendering Provider, Service Location, Financial Class, CPT Code, CARC Code, Remark Code, Claim Status, Claim SubStatus, Deposit Date, and Post Date.
- **Filters:** Narrow the results by one or more values for Payer, Rendering Provider, Service Location, Financial Class, CPT Code, CARC Code, and Remark Code.
- **Reset Criteria:** Clears your selections so you can start a new search.

Results Grid

Based on your Group By and SubGroup By selections, the results grid summarizes the down-coded data and typically displays the **Claim Count**, **Charges**, and **Payments** for each grouping. For example, grouping by Payer and sub-grouping by Rendering Provider produces a row for each provider within each payer, with the totals for each.

Drilldown Capabilities

The values in the results grid are interactive, which allows you to drill from the summarized totals down to the underlying detail. Selecting a grouped value (such as a Claim Count) opens a claim-level detail view. A breadcrumb at the top of the drilldown shows the grouping path you followed (for example, *Group by: Payer = Blue Advantage MCare | SubGroup by: Rendering Provider*), and a **Back** button returns you to the previous level.

The claim-level detail includes:

- **Claim ID:** The system ID of the claim. Selecting it opens the individual claim.
- **Claim Status** and **Claim SubStatus:** The current status of the claim.
- **Claim DOS:** The date of service.
- **Procedure:** The procedure code that was originally billed.
- **Adj. Procedure:** The lower-level procedure code the claim was down-coded to, making it easy to see exactly how the claim was adjusted.
- **Charges** and **Payments:** The charge and payment amounts for the claim.
- **Payer:** The payer associated with the claim.
- **Deposit ID:** The related deposit. Selecting it opens the deposit.
- **Deposit Date** and **Post Date:** The deposit and post dates.

From the drilldown you can also select **Open Claim Query** to work the resulting claims, or **Export to Excel** to save the detail. This drilldown path lets you move from a high-level trend all the way to the specific claims behind it without leaving the report.

Down-Coding Report: Advanced Search

Group by: Payer = Blue Advantage MCare | SubGroup by: Rendering Provider = Iqbal M.D., Aamir

| CLAIM ID | CLAIM STATUS | CLAIM SUBSTATUS | CLAIM DOS | PROCEDURE | ADJ. PROCEDURE | CHARGES | PAYMENTS | PAYER |
|----------|--------------------------------|-----------------|------------|-----------------------------|----------------------------------|----------|-----------|------------------|
| 70647 | Ready to Send, Statement | | 02/09/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$81.63) | Blue Advantage A |
| 70655 | Ready to Send, Statement | | 02/10/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$66.93) | Blue Advantage A |
| 70105 | Ready to Send, Statement | | 02/10/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$76.73) | Blue Advantage A |
| 70237 | Ready to Send, Statement | | 02/12/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$66.93) | Blue Advantage A |
| 70277 | Ready to Send, Statement | | 02/12/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$66.93) | Blue Advantage A |
| 70469 | Ready to Send Secondary, Pa... | | 02/12/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | (\$81.63) | Blue Advantage A |
| 70680 | | | 01/13/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | \$66.93 | Blue Advantage A |
| 70682 | | | 01/14/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | \$66.93 | Blue Advantage A |
| 70684 | | | 01/15/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | \$66.93 | Blue Advantage A |
| 70688 | | | 01/27/2026 | 99214 Office Visit Extended | 99213 Office Visit, Intermediate | \$229.00 | \$66.93 | Blue Advantage A |

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