



A 'balance forward' statement with no service detail

North Dallas Dermatology Associates

Statement of Account · 08/20/2025 · Patient: Alex R. Sample

Description	Amount
Previous balance ¹	\$300.00
Payment received — thank you	-\$300.00
Balance forward ²	\$0.00

³ *(no dates of service · no description of the care · no codes)*

Please remit any balance due upon receipt.

× INSUFFICIENT

This document will be denied — send something else.

WHY THIS FAILS

- ¹ **'Previous balance / payment on account'** tells you money was owed and paid — but not for what.
- ² **No dates of service.** Can't confirm the expense falls inside the plan year or grace period.
- ³ **No description of the care and no codes.** Eligibility can't be judged, so the reviewer has nothing to approve.

✓ WHAT TO SEND INSTEAD

Ask the office for an **itemized statement** that lists each date of service, the procedure (with CPT codes), the provider, the patient, and the amount. A running-balance statement never substantiates on its own.

SAMPLE — synthetic teaching exhibit; fictitious provider, patient & data. **Not a real record.**