Insurance Payer Mix Report

Last modified on 10/06/2025 3:37 pm EDT

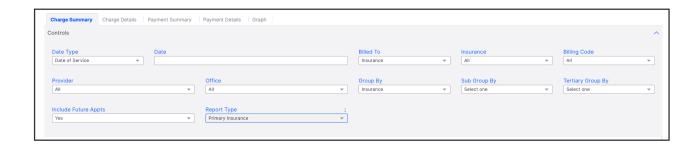
The insurance payer mix report details the account's revenue and allows you to drill down into certain segments, such as commercial insurance, Medicare, Medicaid, or self-pay patients. This information will enable the office to understand the proportion of income from each payer segment.

Available filters include Date Type, Filter Date, Billed To, Insurance, Billing Code, Provider, and Office. Once the parameters of the desired information are set, there are options to display the information: Group By, Sub Group By, and Tertiary Group By. There is also an option to include or exclude Future Appointments.

The report also allows you to view Charges as both a summary and a detailed list, as well as payments in the same formats.

Charge Summary | Charge Details | Payment Summary | Payment Details | Graph | Video Walkthrough

Charge Summary



Available options include:

Date Type - Charge Created Date, Check Date, Date of Service, Deposit Date, Payment Date

Date - The date or date range for the information requested.

Billed To - Insurance, Patient

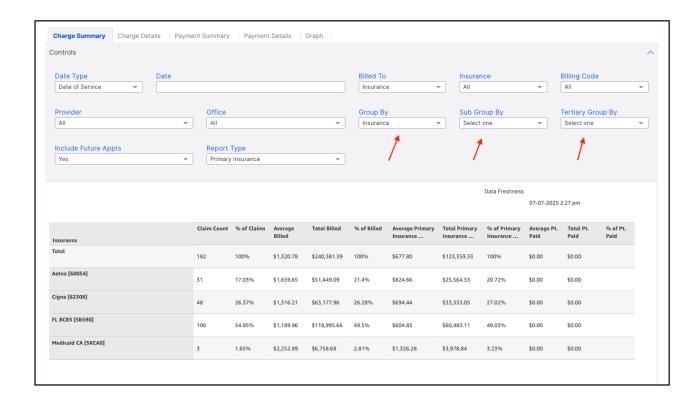
Insurance - List of payers who have been billed through the office

Billing Code - List of codes that have been billed through the office

Provider - List of all providers associated with the office

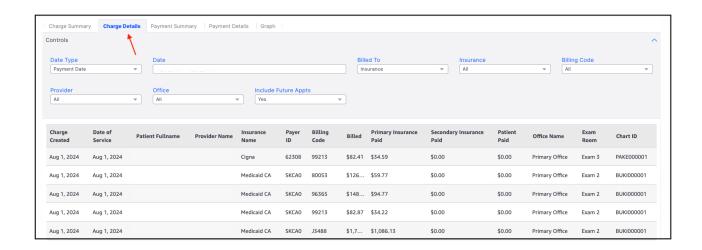
Office - List of all separate offices associated with the account

Once the parameters are set, the report then allows the user options on how the information should be displayed. Options include a primary Group By, a secondary Sub Group By, and a third Tertiary Group By.



Charge Details

The Insurance Payer Mix Charge Details tab will show you the details that correspond to the charge parameters set on the Summary tab.



Each column can be sorted, frozen, or frozen up to that specific column by pressing the bold header name.

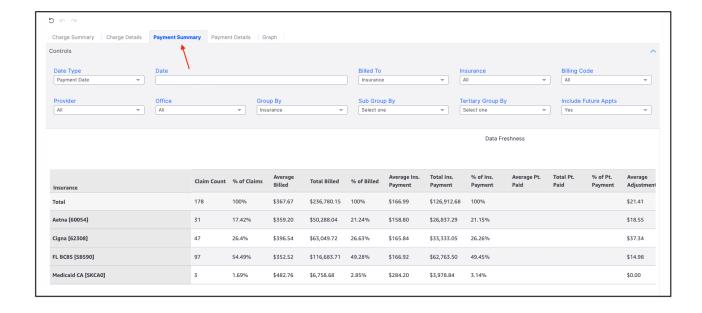


There are additional options to maximize the screen (diagonal arrows), sort the view (vertical arrows), and options to export the file to CSV or MS Excel (three horizontal dots). These options will appear by hovering in the top right corner of the report, under the Office option.



Payment Summary

The Insurance Payer Mix Payment Summary tab allows you to set the report's parameters.



Available options include:

Date Type - Check Date, Deposit Date, Payment Date

Date - The date or date range for the information requested.

Billed To - Insurance, Patient

Insurance - List of payers who have been billed through the office

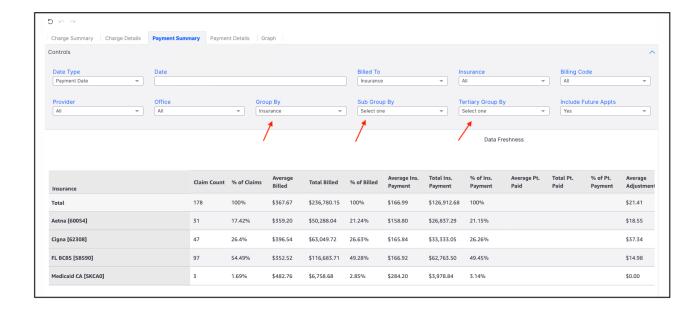
Billing Code - List of codes that have been billed through the office

Provider - List of all providers associated with the office

Office - List of all separate offices associated with the account

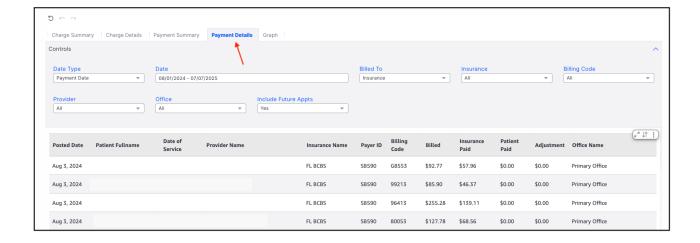
Include Future Appts - Will allow future appointments to be included or excluded from the report

Once the parameters are set, the report then allows the user options on how the information should be displayed. Options include a primary Group By, a secondary Sub Group By, and a third Tertiary Group By.

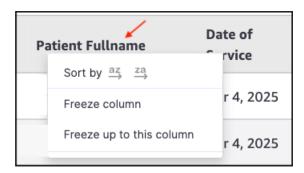


Payment Details

The Insurance Payer Mix Payment Details tab will show you the details that correspond to the payment parameters set on the Summary tab.



Each column can be sorted, frozen, or frozen up to that specific column by pressing the bold header name.

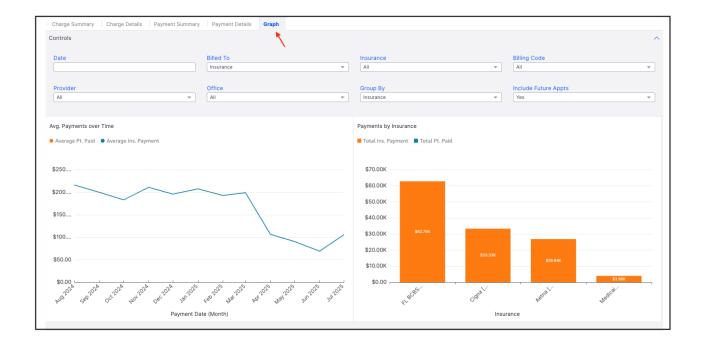


There are additional options to maximize the screen (diagonal arrows), sort the view (vertical arrows), and options to export the file to CSV or MS Excel (three horizontal dots). These options will appear by hovering in the top right corner of the report, under the Office option.



Graph

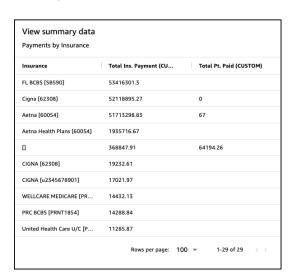
The Graph tab on the Insurance Payer Mix Report displays the information specified on the summary tab in graph form. The graph on the left shows Average payments over time by patients and insurance payers. The graph on the right shows payments by insurance, showing the total paid.

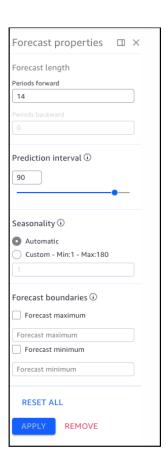


Hovering in the right corner of the Avg. Payments over Time graph (on the left) will expose additional options.



The diagonal arrows will maximize the screen while the three vertical dots will allow the user to view summary data, export to CSV, or enter a forecast.





Additional options included in the Avg. Payments over Time box (hover over the right corner) include maximizing the screen, Drilling up to the top from the filter date, Drilling up from the filter date, and Drilling down from the filter date.



Video Walkthrough