Insurance Payer Mix Report

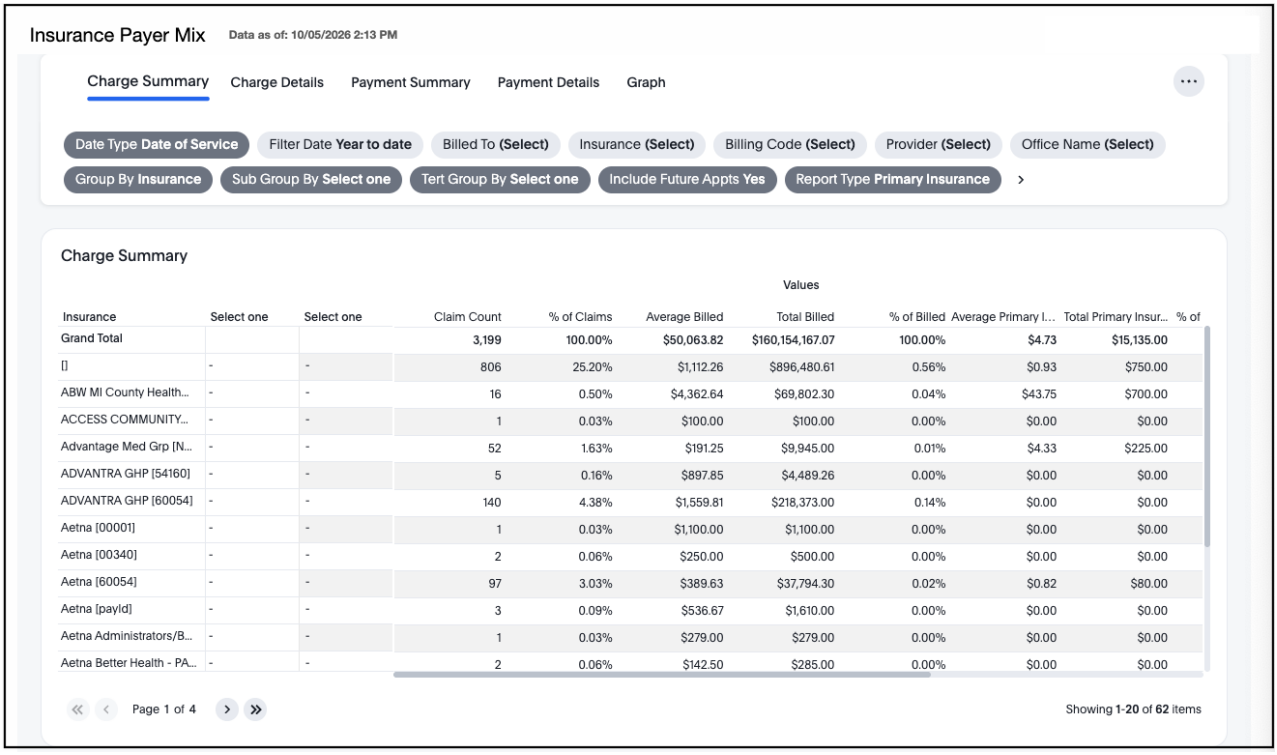
Last modified on 11/06/2026 1:19 pm EST

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.

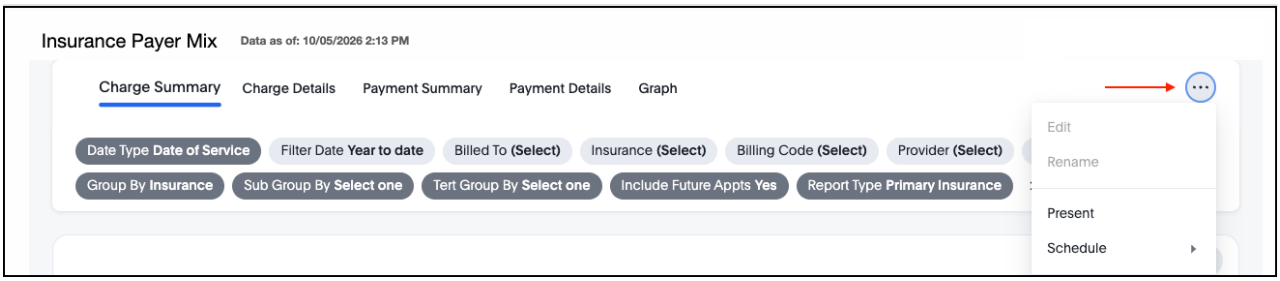
Available filters include: Date Type, Filter Date, Billed To, Insurance, Billing Code, Provider, Office Name, Group By, Sub Group By, Tert Group By, and Include Future Appointments.

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

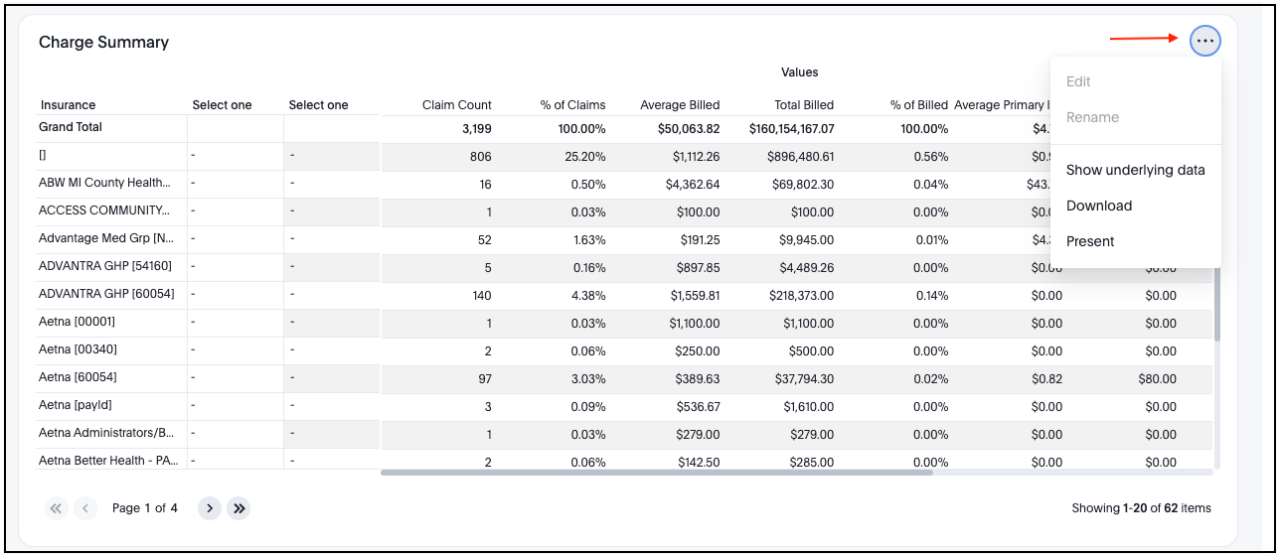
Charge Summary



Hover over the upper-right side of the report to access additional options, including scheduling the report to run at a preset cadence and viewing the information in presentation mode.

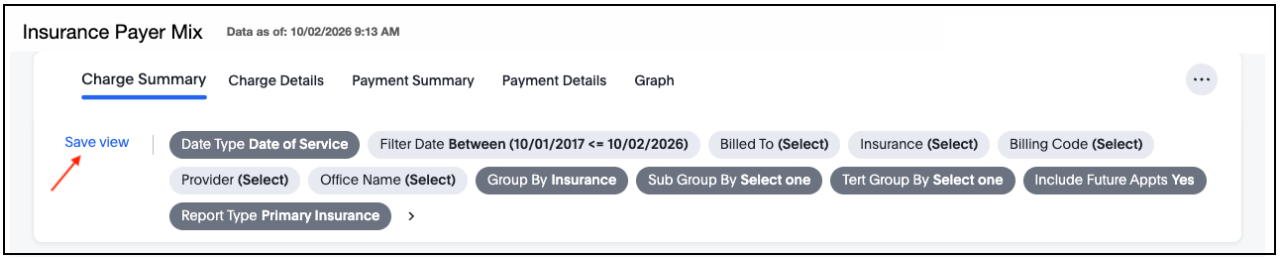


Pressing the three horizontal dots on the upper-right of the Charge Summary tile will expose options to show the underlying data, download the report, and view the information in presentation mode.

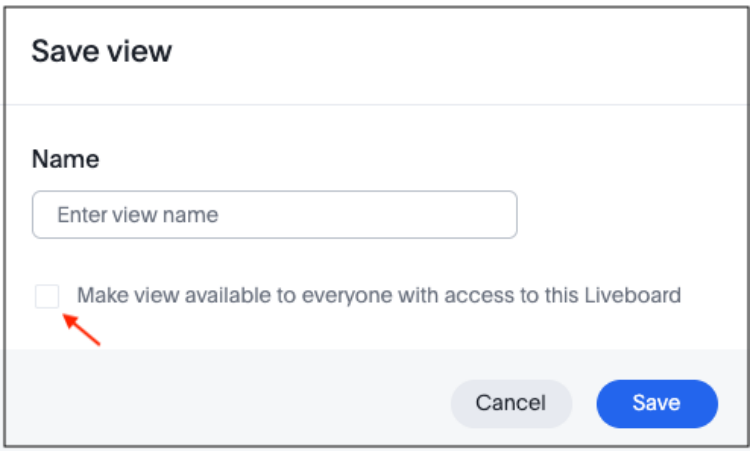


Save View

To save the filters set, press **Save View** on the left side of the screen.

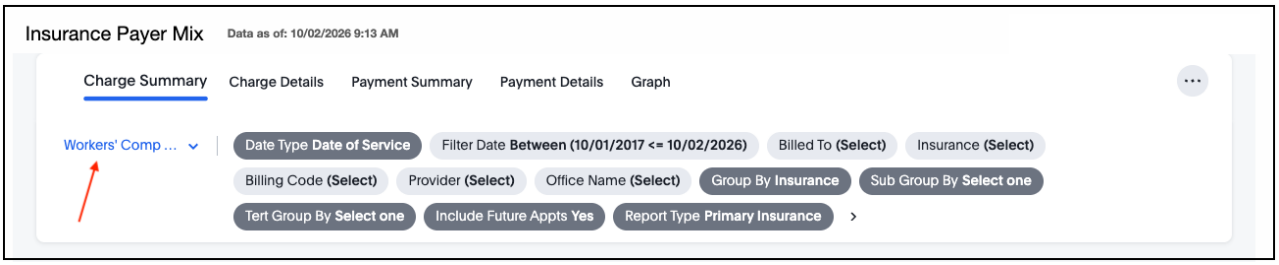


Enter a name for the view when prompted. To share the view with colleagues, check the box next to **Make view available to everyone with access to this Liveboard**.



Saved views preserve all filter selections, including date type and grouping. They do not save a specific date range.

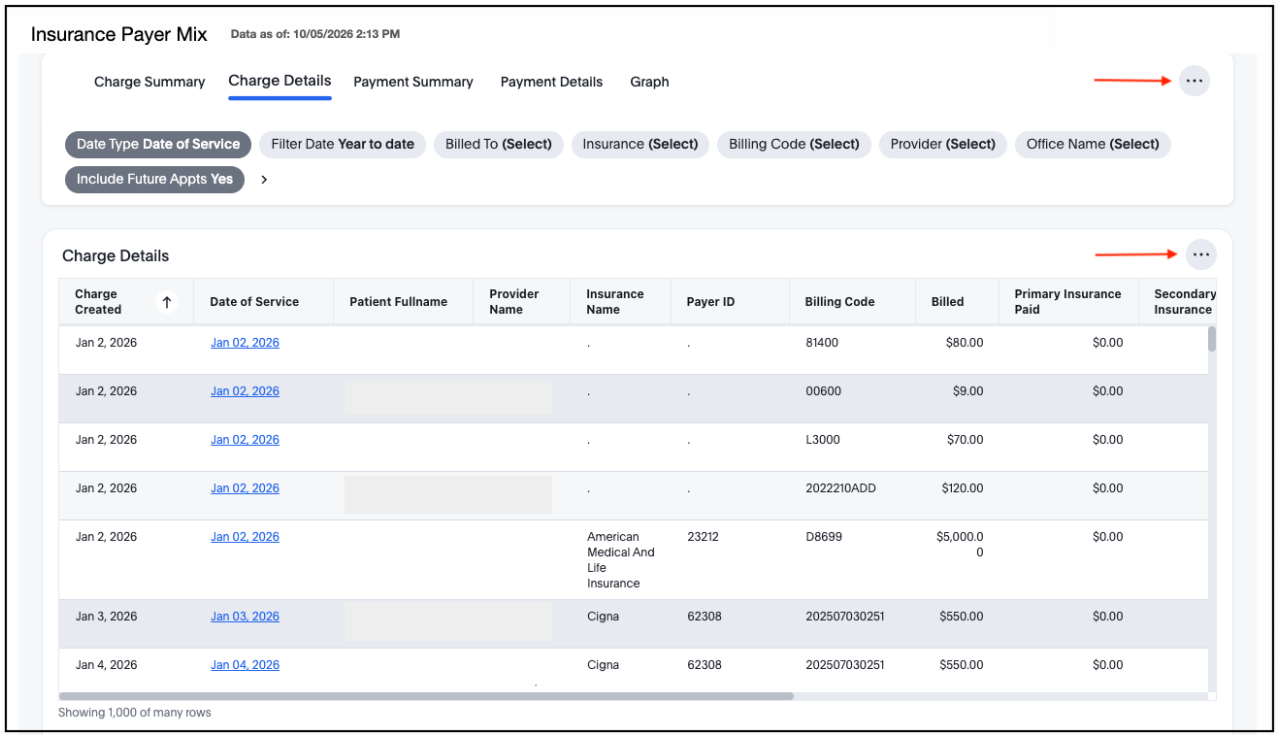
To rerun the report, select it from the left side of the screen. If it doesn't show, press the down arrow to view additional saved views.



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.

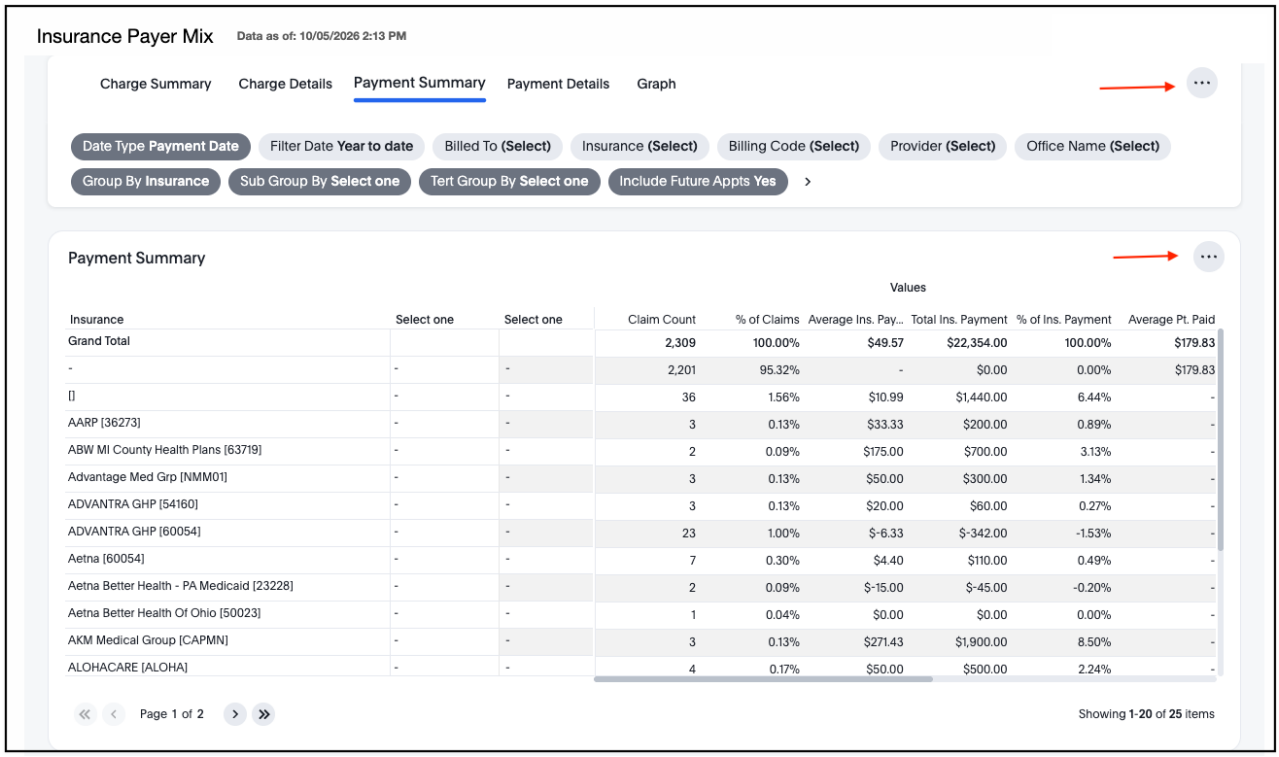
Hover over the upper-right side of the top and bottom tiles to access additional options, including scheduling the report to run at a preset cadence, viewing the underlying data, downloading the report, and displaying the information on the screen in present mode.



Payment Summary

The Insurance Payer Mix Payment Summary tab allows you to see the information based on insurance payer.

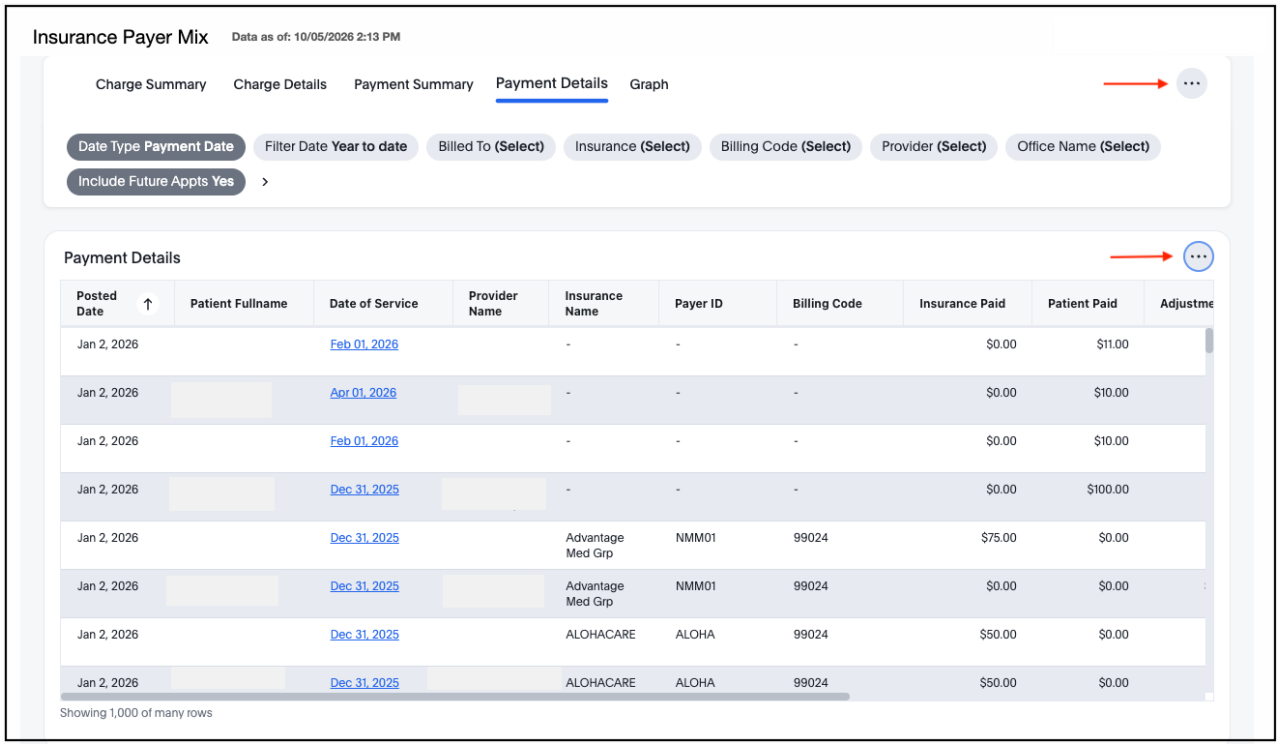
Hover over the upper-right side of the top and bottom tiles to access additional options, including scheduling the report to run at a preset cadence, viewing the underlying data, downloading the report, and displaying the information on the screen in present mode.



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.

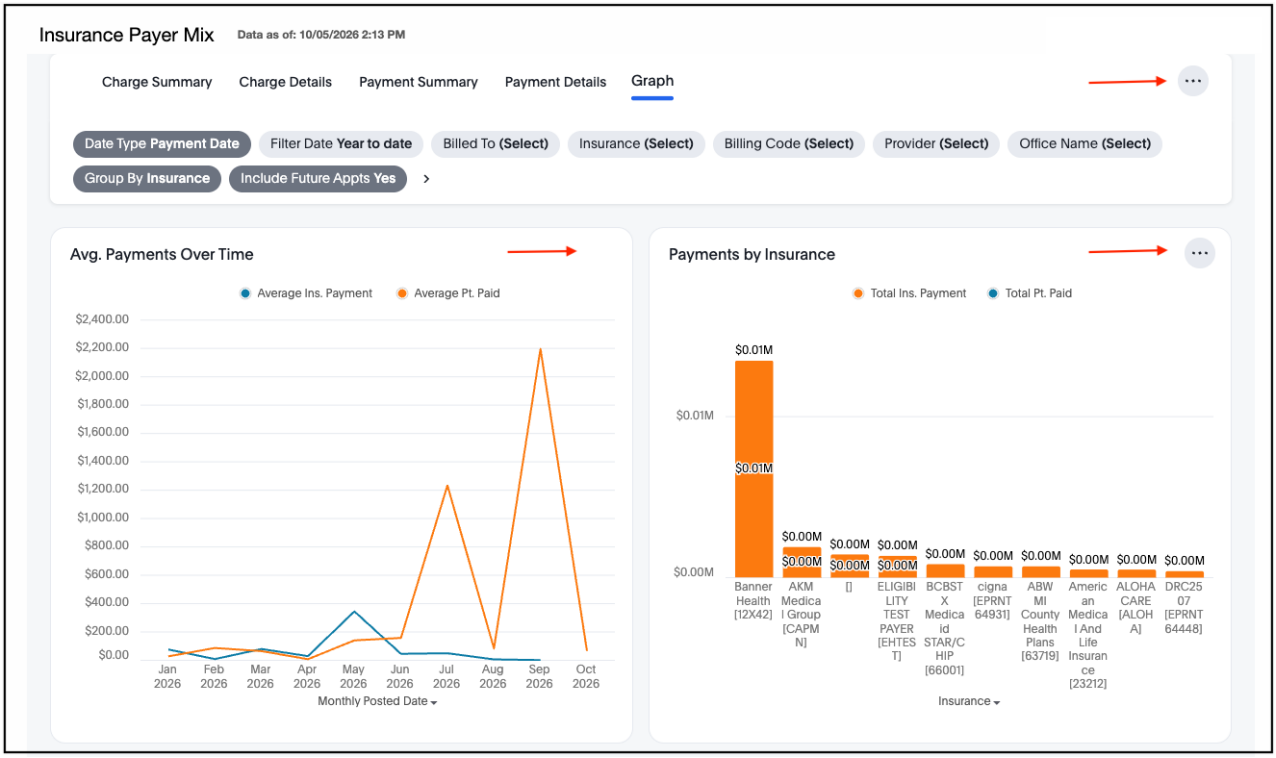
Hover over the upper-right side of the top and bottom tiles to access additional options, including scheduling the report to run at a preset cadence, viewing the underlying data, downloading the report, and displaying the information on the screen in present mode.



Graph

The **Graph** tab displays the information from the Summary tab in graph form. The left graph shows **average payments over time** by patient and insurance payer, while the right graph shows **total payments by insurance**.

Hover over the upper-right side of any of the three tiles to access additional options, including scheduling the report to run at a preset cadence, viewing the underlying data, downloading the report, and displaying the information on the screen in present mode.



Video Walkthrough