

Insurance Payer Mix: Charge Summary tab

Last modified on 07/07/2025 3:32 pm EDT

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

The screenshot shows the 'Charge Summary' tab selected in a navigation bar. Below the tabs is a 'Controls' section with a light gray background. It contains several dropdown menus and text input fields for report parameters. The parameters are: Date Type (set to 'Date of Service'), Date (empty), Billed To (set to 'Insurance'), Insurance (set to 'All'), Billing Code (set to 'All'), Provider (set to 'All'), Office (set to 'All'), Group By (set to 'Insurance'), Sub Group By (set to 'Select one'), Tertiary Group By (set to 'Select one'), Include Future Appts (set to 'Yes'), and Report Type (set to 'Primary Insurance').

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

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.

Charge Summary

Charge Details

Payment Summary

Payment Details

Graph

Controls

Date Type

Date of Service

Date

Billed To

Insurance

Insurance

All

Billing Code

All

Provider

All

Office

All

Group By

Insurance

Sub Group By

Select one

Tertiary Group By

Select one

Include Future Appts

Yes

Report Type

Primary Insurance

Data Freshness

07-07-2025 2:27 pm

Insurance	Claim Count	% of Claims	Average Billed	Total Billed	% of Billed	Average Primary Insurance ...	Total Primary Insurance ...	% of Primary Insurance ...	Average Pt. Paid	Total Pt. Paid	% of Pt. Paid
Total	182	100%	\$1,320.78	\$240,381.39	100%	\$677.80	\$123,359.33	100%	\$0.00	\$0.00	
Aetna [60054]	31	17.03%	\$1,659.65	\$51,449.09	21.4%	\$824.66	\$25,564.33	20.72%	\$0.00	\$0.00	
Cigna [62308]	48	26.37%	\$1,316.21	\$63,177.96	26.28%	\$694.44	\$33,333.05	27.02%	\$0.00	\$0.00	
FL BCBS [SB590]	100	54.95%	\$1,189.96	\$118,995.66	49.5%	\$604.83	\$60,483.11	49.03%	\$0.00	\$0.00	
Medicaid CA [SKCA0]	3	1.65%	\$2,252.89	\$6,758.68	2.81%	\$1,326.28	\$3,978.84	3.23%	\$0.00	\$0.00	