# Insurance Submission Report

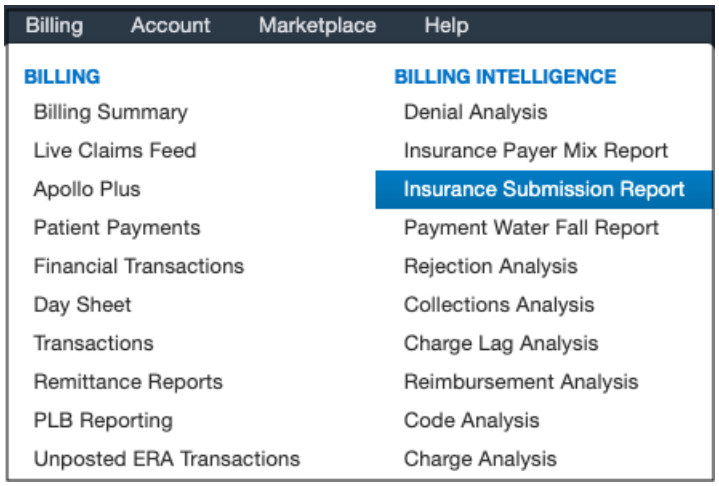
Last modified on 11/06/2026 1:26 pm EST

The **Insurance Claims Submission Report** provides an overview of claims submitted during a selected time period and their current status, helping you track and monitor claim activity efficiently. The report includes two tabs: **Summary**, which provides an at-a-glance view of submission activity, and **Details**, which provides information on individual claims.

Summary Tab | Save View | Detail Tab | Video Walkthrough

## Summary Tab

1. Navigate to Billing > Billing Intelligence > Insurance Submission Report



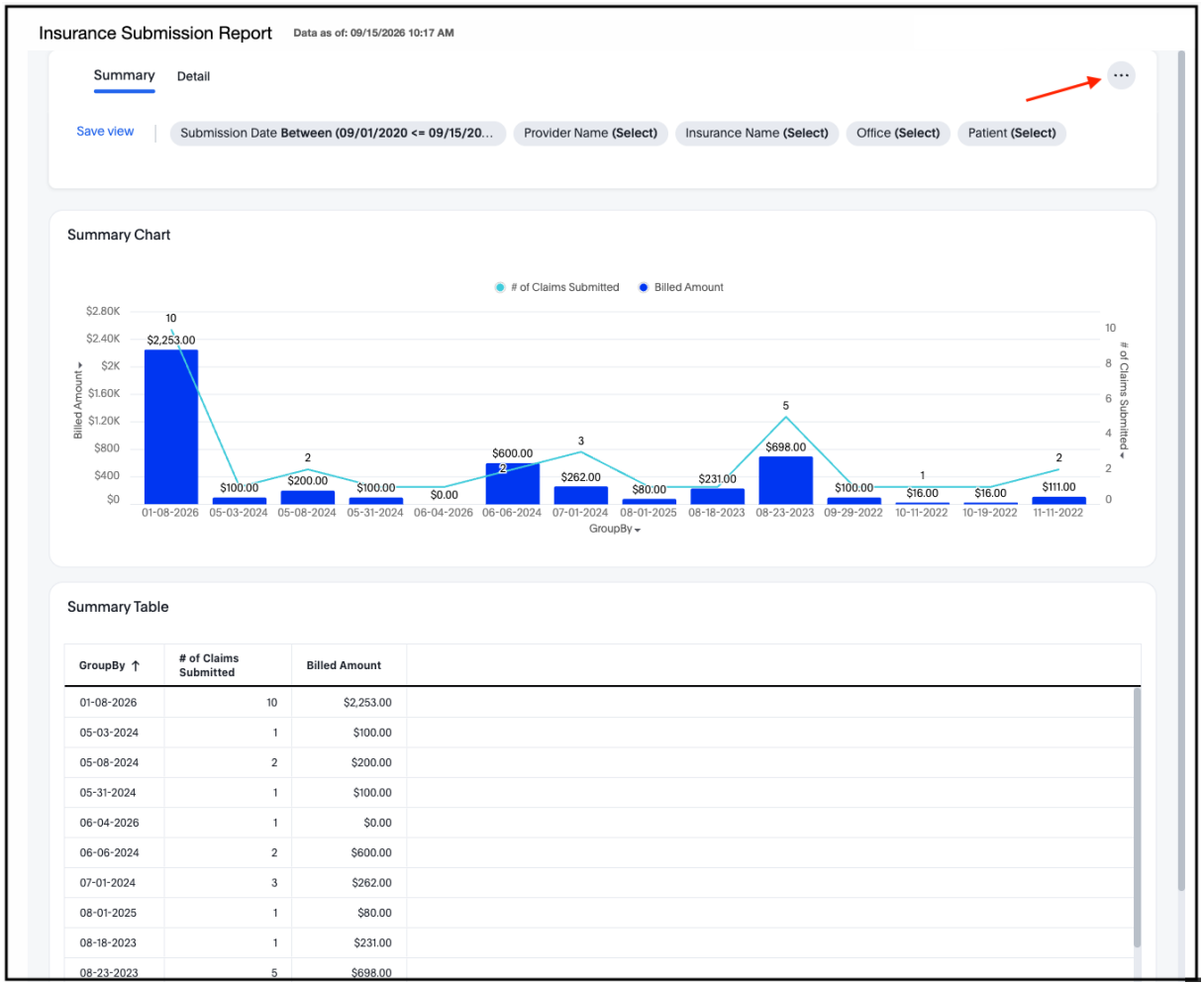

2. The report will populate with default parameters. You can change the parameters to meet your needs. Options include:
    a. **Submission Date** - Select a rolling or fixed date or date range
    b. **Provider Name** - Select one, multiple, or all providers
    c. **Insurance Name** - Select one, multiple, or all Insurance Payers
    d. **Office** - Select one, multiple, or all offices
    e. **Patient** - Select one, multiple, or all patients
    f. **Group by** - Select how the information is grouped: Day, Month, Insurance, Provider, Claim Status, or Office

3. If changes are made to the report parameters, the report will regenerate automatically.

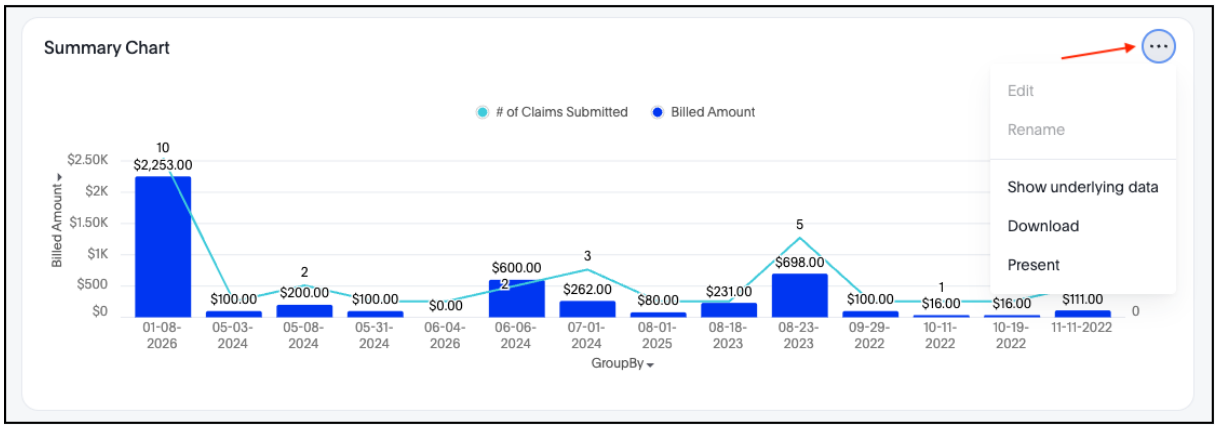



4. The Summary Table at the bottom of the report will summarize the information that meets the report parameters.

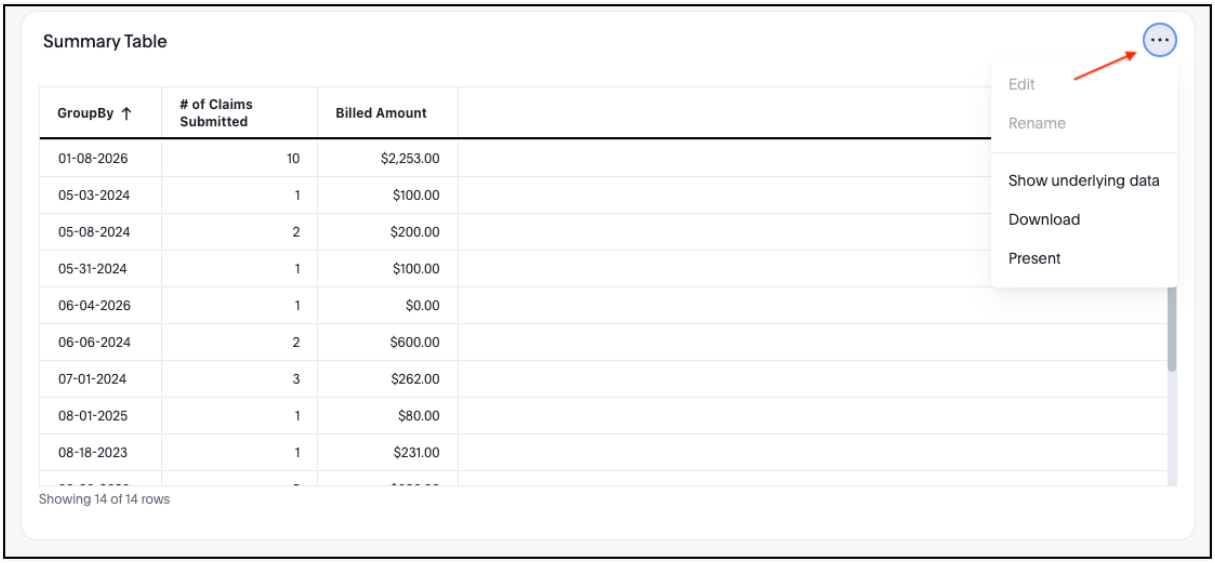
5. Hover over the upper-right side of the report's top panel to access additional options, including displaying the information on the screen in present mode and scheduling the report to run on a predetermined schedule and email it to listed addresses.




6. Hover over the upper right side of the Summary Chart panel to access additional options, including showing the underlying data, downloading the report, and displaying the information on the screen in present mode.

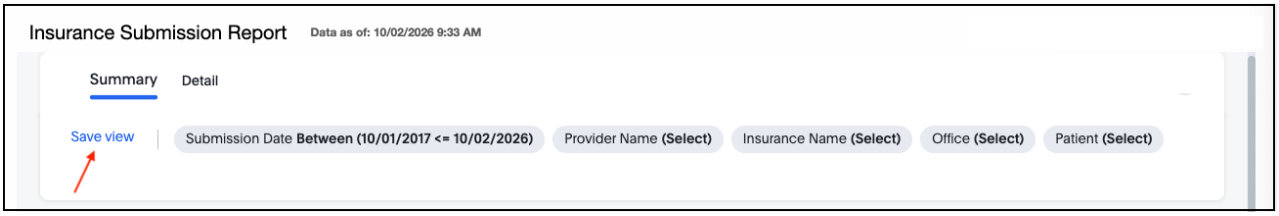



7. Hover over the upper right side of the Summary Table panel to access additional options, including showing the underlying data, downloading the report, and displaying the information on the screen in present mode.

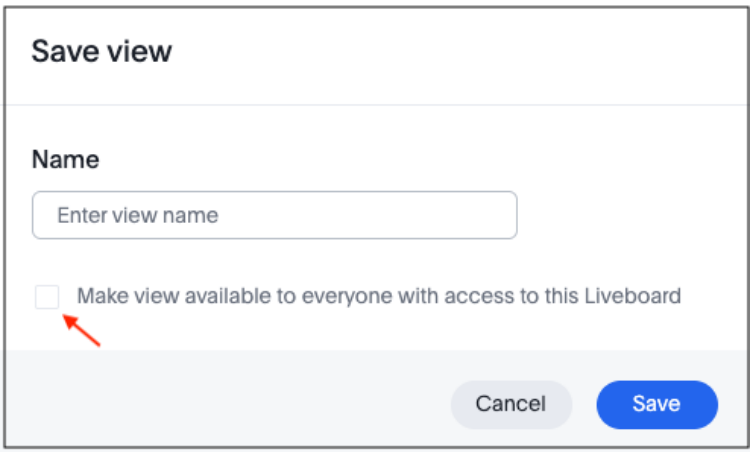



## Save View

To save the filter 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

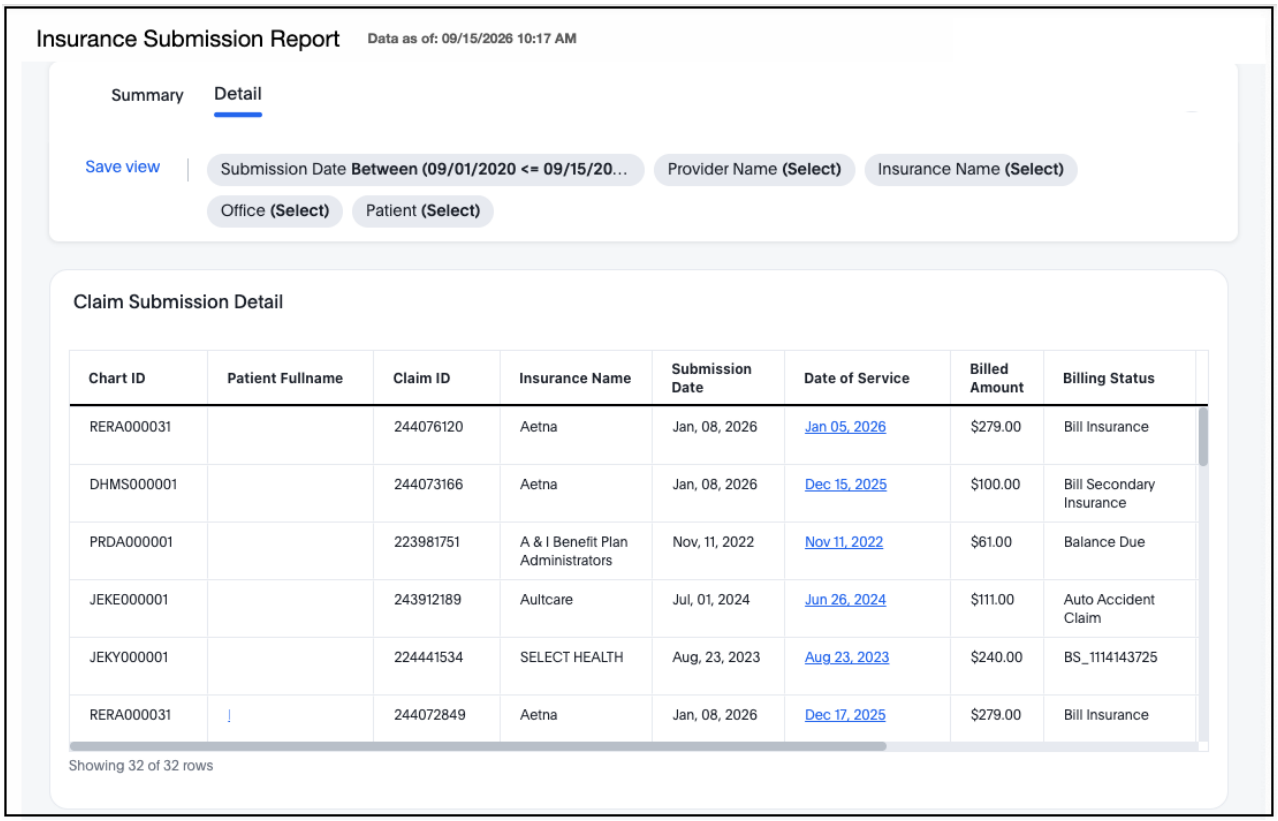
specific date range.

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.

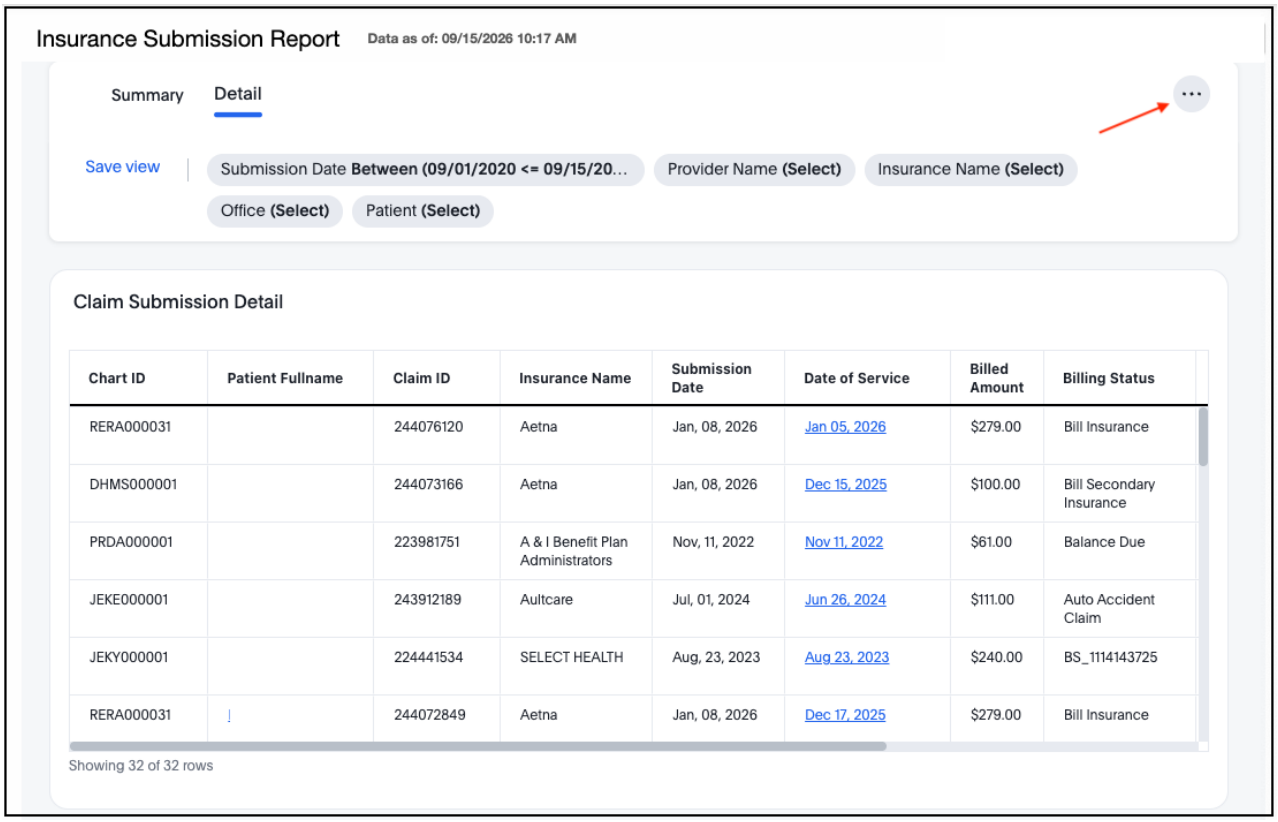



## Detail Tab

The **Details** tab provides detailed patient and claim information based on the report parameters selected.




Hover over the upper-right side of the report to access additional options, including viewing the underlying data, downloading the report, and displaying the information on the screen in present mode.




## Video Walkthrough