Insurance Submission Report

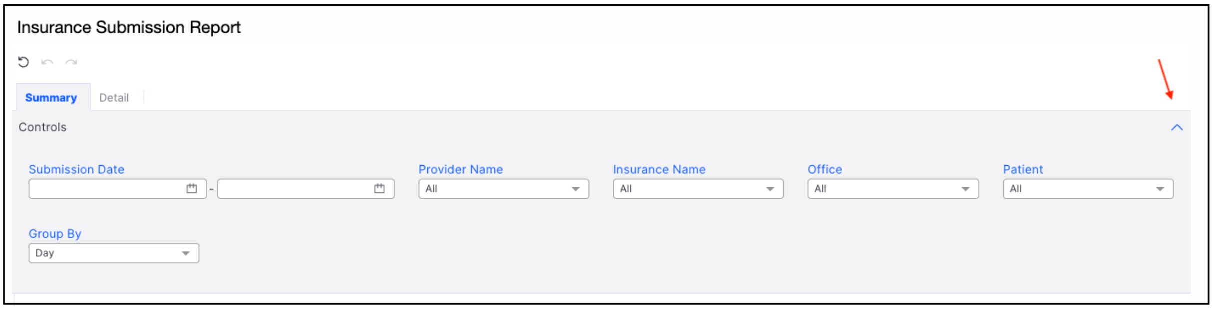
Last modified on 09/11/2025 3:15 pm EDT

The Insurance Claims Submission Report provides a clear overview of all claims submitted within a selected time period, along with their current status. It is designed to help you track and monitor claim activity efficiently, ensuring greater visibility into your billing process. The report includes two tabs: Summary, for an at-a-glance view of overall submission activity, and Details, for a deeper look at individual claim information.

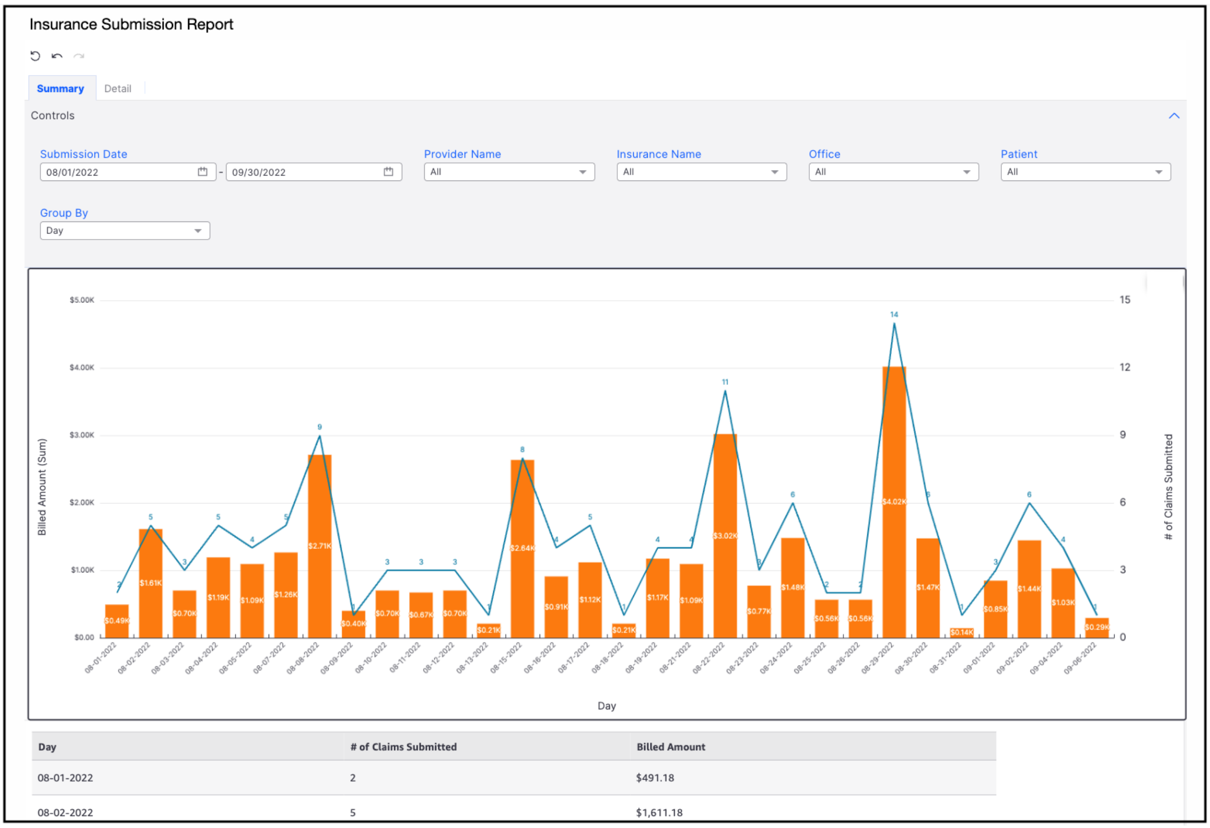
Summary Tab | Detail Tab | Video Walk Through

Summary Tab

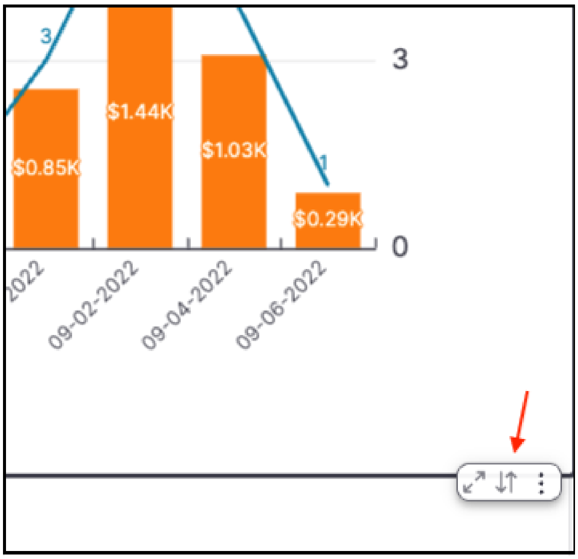
1. Navigate to Billing > Billing Intelligence > Insurance Submission Report
2. Press on the arrow to expose the report parameters field.



3. Options include:
   a. Submission Date - Could be a single date or a date range.
   b. Provider Name - Can include a single, multiple, or all providers.
   c. Insurance Name - Can include a single, multiple, or all payers. Search supports Insurance Name or Payer ID.
   d. Office - Can include a single, multiple, or all offices.
   e. Patient - Can include a single, multiple, or all patients.
   f. Group By - This allows you multiple ways to display/group the data. Selections include by Day, Insurance, Month, Office, or Provider.
4. Once the report parameters are set, the report will generate. The graph will show billed amounts on the left; number of claims on the right, and the group by selected across the bottom. Below the chart, will be a table that will list the information in a chart format.

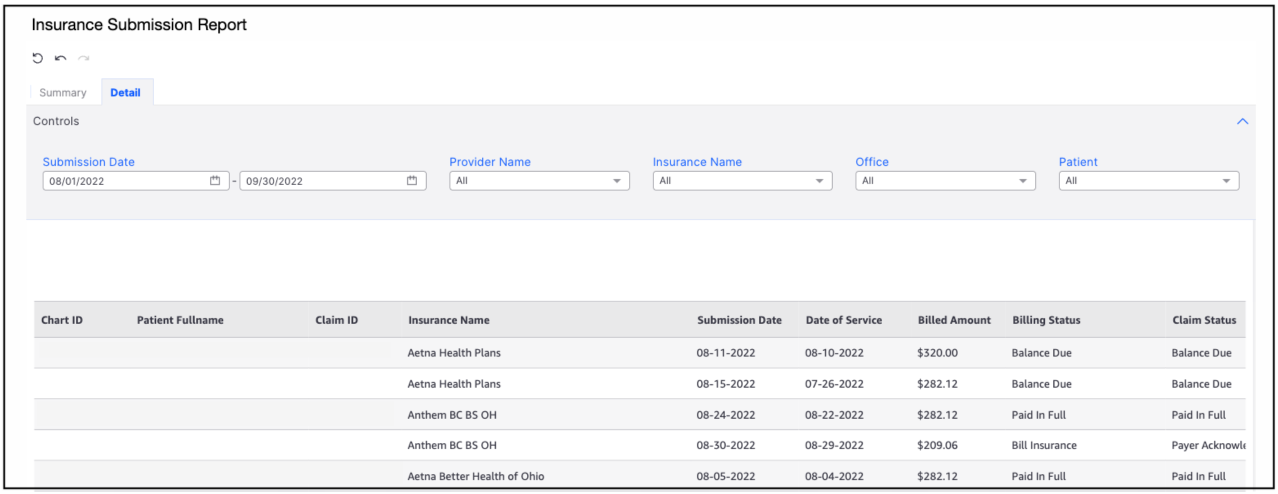


5. Hovering in the top right corner of the graph or table will provide additional options to maximize, sort, or export the information.

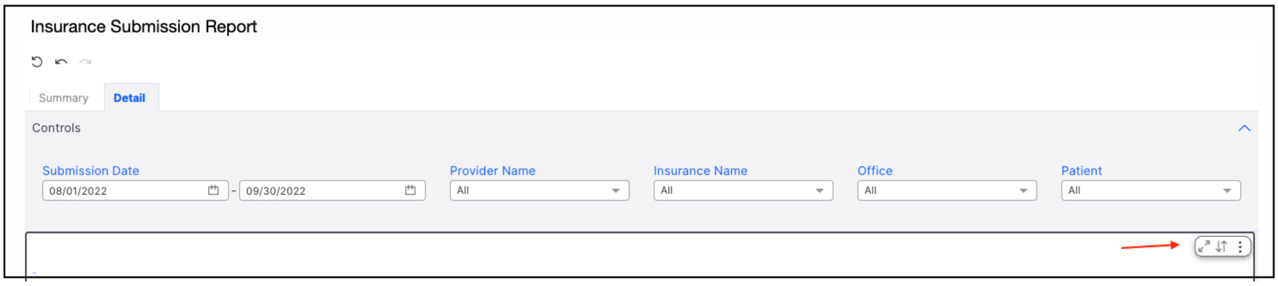


Detail Tab

The Detail tab of the report will show you specific patient information that meet the parameters met.



Hovering in the right corner will provide options to maximize the screen (diagonal arrows), sort (vertical arrows), and export the report (3 vertical dots).



Video Walk Through