

Monthly Financial Report - Advanced Search Tab

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Monthly Financial Report Monthly Summary [Advanced Search](#)

Advanced Search

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Date Type
Post Date

Primary Payer Class

Rendering Provider

Group By
Primary Payer Class

Primary Payer

Location

SubGroup By
Primary Payer

Post User

CPT Code

Include Refunds

Include Charges

Include Claim Count

Include Payments/Adjustments

[Run Report](#)

The Monthly Financial Report can be found in the Reports portal under the Billing category on the navigation bar. The Advanced Search tab of this report can be found on the right upper corner of the report. The Advanced Search tab allows a user to enter specific search criteria to run the Monthly Financial Report by.

Advanced search fields

- **Date Type:** The date type that will be utilized to run the report. There are 3 different date types; Post Date, Service/Deposit Date, or Submission Date.
- **Group By:** This allows the user to select what the grouping on the report will be. The field selected here is what the returned information on the report will be grouped by. The default selection will be Primary Payer Class.
- **SubGroup By:** This allows the user to select an additional grouping on the report. The default selection will be Primary Payer.
- **Primary Payer Class:** This allows the user to select the primary payer financial class to filter the report by.
- **Primary Payer:** This allows the user to select the primary payer(s) to filter the report by.
- **Post User:** This allows the user to select the post user(s) to filter the report by. This can be either the charge entry user or the payments/adjustments posting user.
- **Rendering Provider:** This allows the user to select the rendering provider(s) to filter the report by.
- **Location:** This allows the user to select the service location(s) to filter the report by.
- **CPT Code:** This allows the user to select the CPT code(s) to filter the report by.
- **Includer Refunds:** This allows the user to include refunded payment amount on the report. By default this will be set to Yes.
- **Include Charges:** This allows the user to include charges amount on the report. By default this will be set to Yes.
- **Include Claim Count:** This allows the user to include the claim count on the report. By default this will be set to Yes.
- **Include Payment/Adjustments:** This allows the user to include payments/adjustments on the report. By default this will be set to Yes.

After running the report, results will be displayed based on the group by, and subgroup by selection.

To drill into the detail of any grouping or cross-section, merely click the group value or the amount value.
