

Navigating the Birth to Three Fiscal Portal: Summary by Service Type Reports

13 Steps [View most recent version](#) 

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Creation Date
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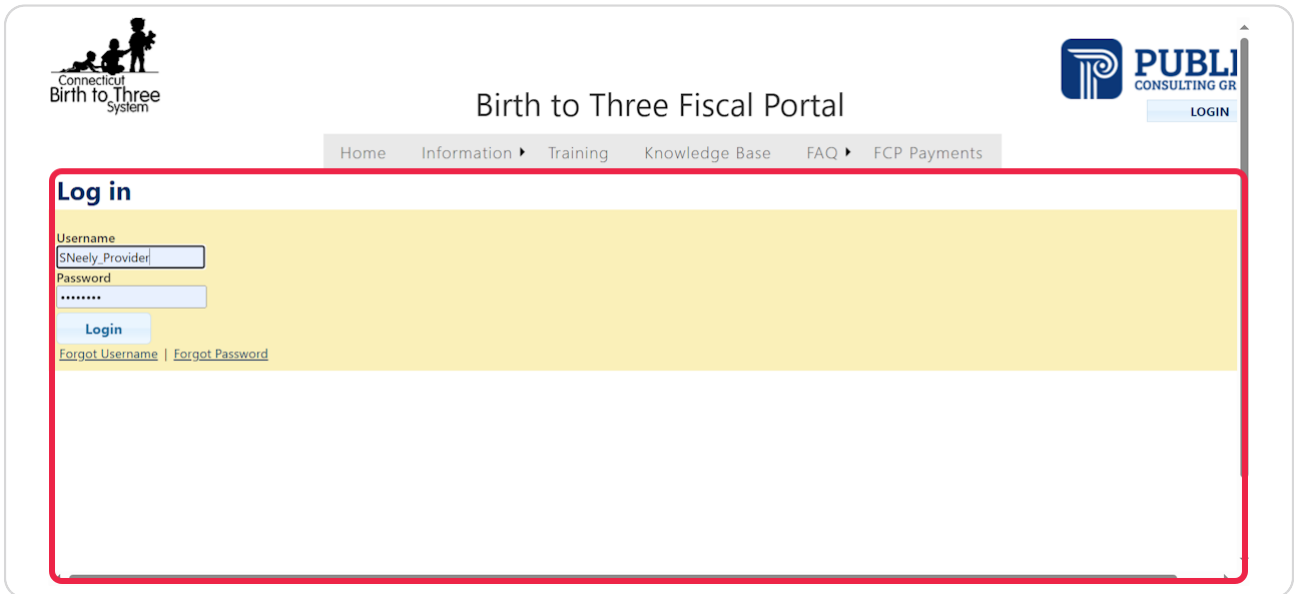
Last Updated
Mar 27, 2025

STEP 1

Type in Username and Password

STEP 2

Select Log in button



STEP 3

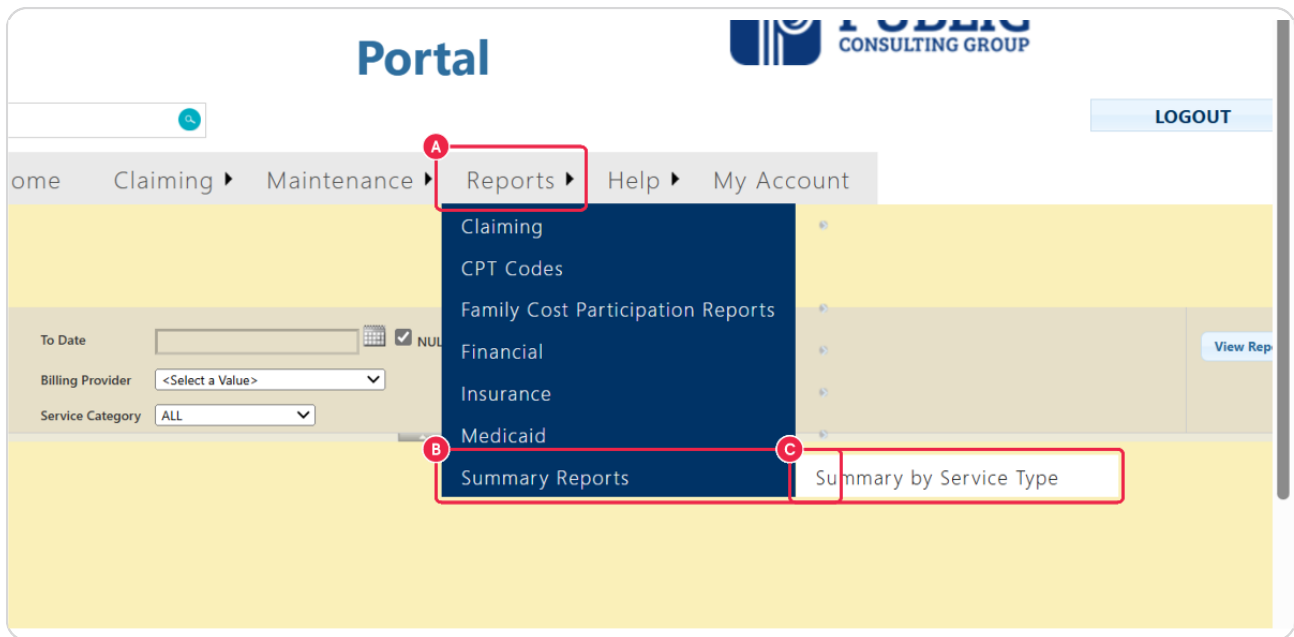
A. Select the Reports tab

B. Select the Summary Reports Tab

C. Select the Summary by Service Type button

The Summary By Service Type report is a report used to verify escrow information. Providers can review payment amounts at a summary level, then drill into each service type provided. At the detail level each record provides information about the child, the date of service, service type, amount billed, and amount paid by Insurance, Medicaid, and Escrow.

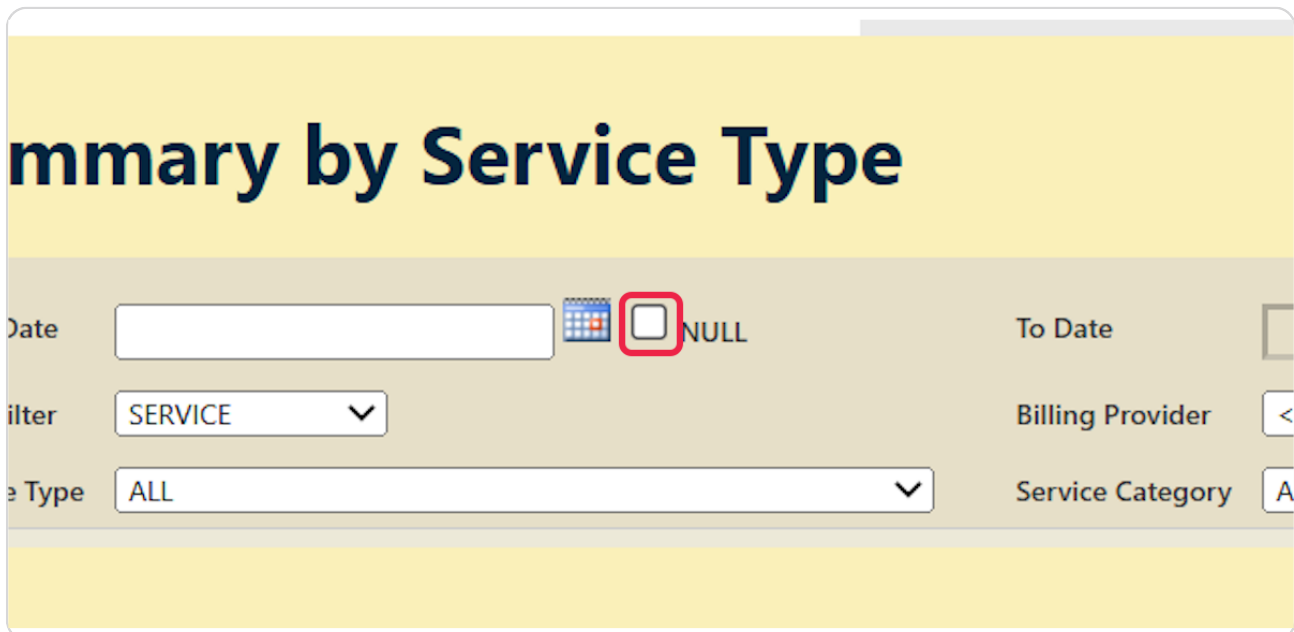
Best practice for this report would be viewed once or twice a month to see what's outstanding with claims. This report allows the provider to research outstanding claims. They can see what is underpaid, what's been paid, etc.



STEP 4

Select an option

Deselect the Null checkboxes to enter the dates from which you want to view the Service Type Summary



STEP 5

Select the beginning date for the Summary Report.

Summary by Service Type

From Date			☐ NULL	To Date	
Date Filter	SERVICE			Billing Provider	
Service Type	ALL			Service Category	

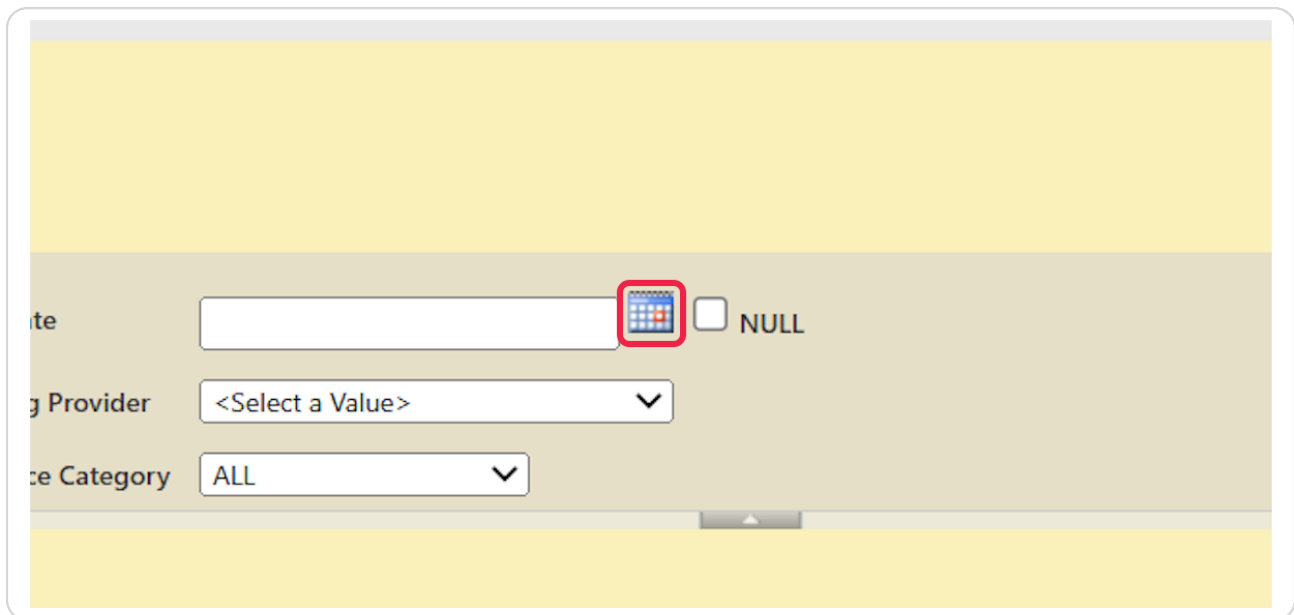
STEP 6

Deselect the Null box.

		☐ NULL
Provider	<Select a Value>	
Category	ALL	

STEP 7

Select the end date in which you would like to view the Summary Report.

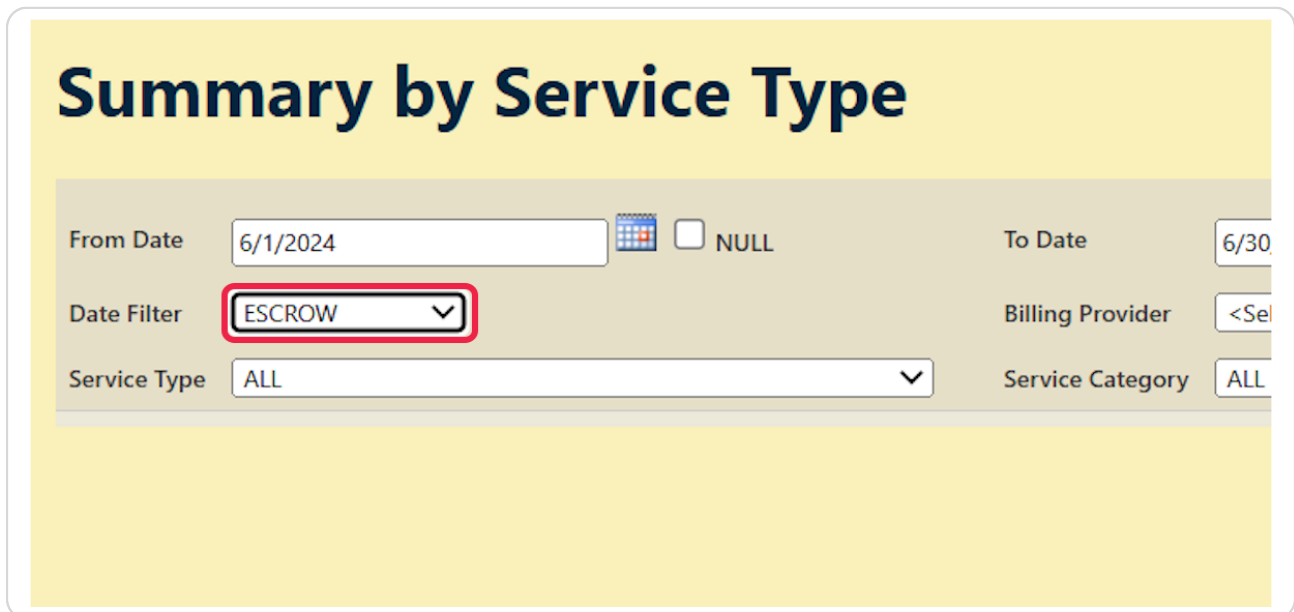


A screenshot of a web form interface. The form has a light yellow header and a light beige body. It contains three input fields: a date field with a calendar icon, a dropdown menu labeled "<Select a Value>", and another dropdown menu labeled "ALL". A red square highlights the calendar icon next to the date field.

STEP 8

Select Date Filler

Most commonly this report is viewed under Escrow. It can also be viewed by Received and Service.



A screenshot of a web form interface titled "Summary by Service Type". The form has a light yellow header and a light beige body. It contains several input fields: "From Date" with a date value of "6/1/2024" and a calendar icon, "To Date" with a date value of "6/30/2024", "Date Filter" with a dropdown menu showing "ESCROW", "Billing Provider" with a dropdown menu showing "<Select a Value>", "Service Type" with a dropdown menu showing "ALL", and "Service Category" with a dropdown menu showing "ALL". A red square highlights the "ESCROW" option in the "Date Filter" dropdown menu.

STEP 9

Select Billing Provider

The screenshot shows a web form with a yellow header and a tan body. The form includes the following fields:

- To Date:** A date input field containing "6/30/2024" with a calendar icon to its right.
- Billing Provider:** A dropdown menu with "Creative Interventions 1710329081" selected. This field is highlighted with a red rectangular box.
- Service Category:** A dropdown menu with "ALL" selected.

STEP 10

Select the View Report tab on the far right side of your screen

The screenshot shows a web form with a yellow header and a tan body. On the far right side of the screen, there is a button labeled "View Rep". This button is highlighted with a red rectangular box.

STEP 11

A. View Summary of Claims by Provider below

B. It can be scroll down to view Totals Row to view at Total Amount Billed and Total Amount Paid. User can select Totals under Total Claims Billed Column

Scroll down to view Totals Row to view at Total Amount Billed and Total Amount Paid.

Date Filter: ESCROW | Billing Provider: Creative Interventions 1710329081 | Service Type: ALL | Service Category: ALL

1 of 1 | Find | Next

Summary of Claims for County

Service Category Description	Service Type Description	Service Method Description	Number Of Services	Number Of Children	Total Claims Billed	Open Claims	Total Billed Amount	Total Paid Amount	Insurance Claims Pending
Total									

STEP 12

Export Summary by Service Type Report for Easier Viewing

NULL | To Date: 6/30/2024 | Billing Provider: Creative Intervention | Service Category: ALL

Find | Next

Export Options: Word, Excel, PowerPoint, PDF, TIFF file

Summary by Service Type

STEP 13

Select Excel

☐ NULL

To Date

6/30/2024

☐ N

Billing Provider

Creative Interventions 1710329081

Service Category

ALL

Find | Next

Word

Excel

PowerPoint

PDF

TIFF file

MHTML (web archive)

CSV (comma delimited)

XML file with report data

Data Feed

Summary

or County

ce Type	Service Method	r Of	Total Claims
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