A/R Aging Analysis: Ins. Payer - Ins. A/R

Last Modified on 05/04/2021 1:41 pm EDT

Version 14.19

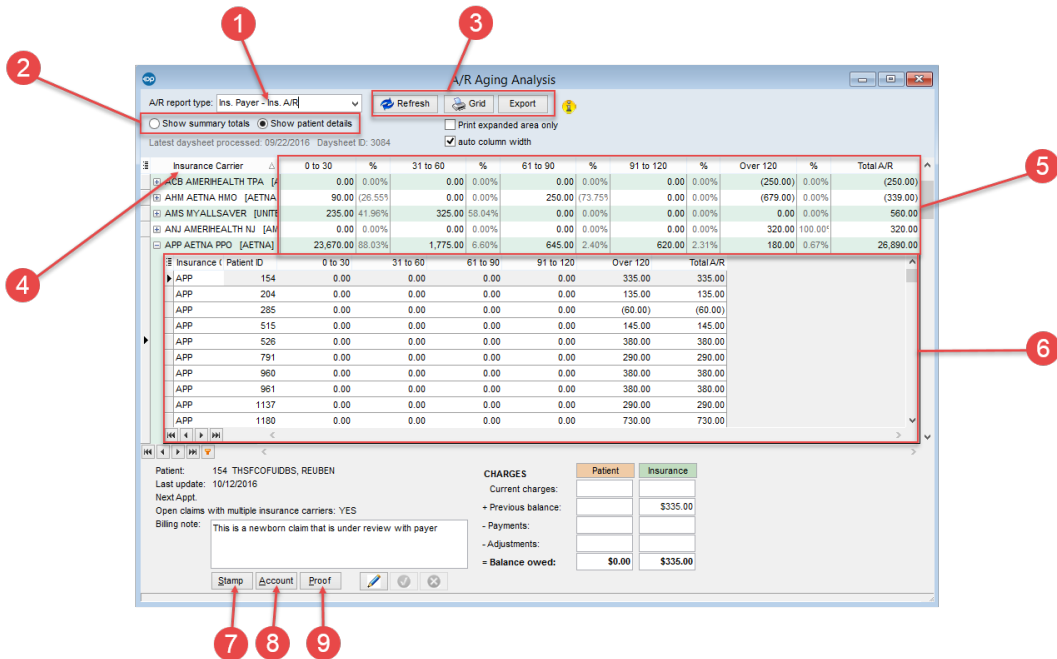> **Path: Billing tab > A/R button > A/R Aging Analysis > A/R Report Type drop-down > Ins. Payer - Ins. A/R**

> 🔑 **User Permission**: If you do not see this report option, you will need to be provided permission **OP_Rpts_AR** by your practice's administrator.

About

The Ins. Payer - Ins. A/R report displays the practice's Insurance Accounts Receivable by Insurance Payer. It displays all outstanding insurance balances due from the payer and breaks the balances up by different aging buckets, making it easy to see, in a quick glance, the areas of work in your A/R that need to be addressed. This report includes the option to "Show patient details" which allows users to view and add billing notes, go directly to the patient account, and work claims as necessary. It is recommended for you to run the Proof Patient Account A/R Update prior to working A/R.

> 📌 **Note**: If patient details indicate a balance in a date range bucket that is different from the top row bucket, then the AR_AGING_HISTORY table data is out of date. Re-run the **update** function by clicking the **Update** button in the **Billing tab > Proof Patient Accounts > A/R Data Update Procedures tab**.

A/R Aging Analysis: Ins. Payer - Ins. A/R Map

Number	Section	Description
1	A/R Report Type	Selects the report to display in the A/R Aging Analysis window.

2	Show radio buttons	The Show radio buttons determine the data that is displayed in the grid: • **Show Summary Totals**: The "Show Summary Totals" radio button provides a summary of the insurance carrier totals. A sample of the summary totals is shown in number 5 on this Ins. Payer - Ins. A/R Map. • **Show Patient Details**: The "Show Patient Details" radio button provides patient-level details for each insurance carrier on the report. This selection provides options for you to add billing notes, Stamp (which allows the user to date stamp the "last updated" field to the current date), go directly to the patient account, and work claims as necessary. A sample of the Show Patient Details in the grid is shown in number 6 on this Ins. Payer - Ins. A/R Map.
3	Function buttons	The function buttons are used to print, export, refresh, and set conditions for the information in the A/R Aging Analysis report.
4	Insurance Carrier	The Insurance Carrier column indicates the name of the insurance carrier for each line of the report. • Selecting "Show Patient Details" will group patients by the listed insurance carrier. The patients are listed by Patient ID. The Patient IDs are displayed by clicking the "+" icon next to the selected insurance carrier name. • Selecting "Show Summary Totals" will only show a high-level report that lists each insurance carrier's amounts over time. The "+" icon is not displayed.
5	Insurance Carrier Summary Details	"Insurance Carrier Summary Details" displays all outstanding insurance balances due from the payer over specified periods of time (0 to 30, 31 to 60, etc).
6	Patient Summary Details	"Patient Summary Details" provides patient-level details for the report. Patient accounts are displayed by the patient ID.
7	Stamp button	The **Stamp** button enters a last updated time stamp on the selected patient transaction.
8	Account button	The **Account** button opens the **Patient Account** window for the selected patient account.
9	Proof button	The **Proof** button opens the **Account Proof** window for the selected patient account. This window displays the proof for the patient and insurance balance information.

Version 14.10

When to Use this Report

Users that wish to see what is in their Accounts Receivable can use this report to see all outstanding insurance balances due from the payer. This report breaks the balances up by different aging buckets:

- <30 days old
- 31-60 days old
- 61-90 days old
- 91-120 days old
- >120 days old

This allows users to easily see, in a quick glance, the areas of work in your A/R that need to be addressed.

Insurance Carrier	0 to 30	%	31 to 60	%	61 to 90	%	91 to 120	%	Over 120	%	Total A/R
ACB AMERIHEALTH TPA [AM	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(250.00)	0.00%	(250.00)
AHM AETNA HMO [AETNA H	90.00	(26.55%	0.00	0.00%	250.00	(73.75%	0.00	0.00%	(679.00)	0.00%	(339.00)
AMS MYALLSAVER [UNITED	235.00	41.96%	325.00	58.04%	0.00	0.00%	0.00	0.00%	0.00	0.00%	560.00
ANJ AMERIHEALTH NJ [AME	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	320.00	100.00%	320.00
APP AETNA PPO [AETNA]	23,670.00	88.03%	1,775.00	6.60%	645.00	2.40%	620.00	2.31%	180.00	0.67%	26,890.00
BCO BC-OTHER [HIGHMARK	20,501.44	110.47%	500.00	2.69%	0.00	0.00%	0.00	0.00%	(2,443.45)	0.00%	18,557.99
BIA INDEPENDENCE AD [INDE	2,330.00	121.67%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(415.00)	0.00%	1,915.00
BKH BC-KHPE [KEYSTONE H	22,950.00	103.93%	(70.00)	0.00%	225.00	1.02%	0.00	0.00%	(1,023.65)	0.00%	22,081.35
BPC BC-PERS CHOICE [PERS	22,803.31	103.46%	0.00	0.00%	0.00	0.00%	145.00	0.66%	(906.60)	0.00%	22,041.71
CHP KHPE-CHP [CHIP - KEYS	685.00	100.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	685.00
COR CORESOURCE [CORES	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(75.00)	0.00%	(75.00)
CP CHOICE PLUS [CHOICE PL	805.00	88.46%	105.00	11.54%	0.00	0.00%	0.00	0.00%	0.00	0.00%	910.00
CPP CIGNA PPO [CIGNA PPO	6,853.04	89.39%	1,165.00	15.20%	0.00	0.00%	0.00	0.00%	(351.32)	0.00%	7,666.72
DEF DEFINITY [DEFINITY HEA	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(569.14)	0.00%	(569.14)
ERI ERIE INSURANCE [ERIE IN	360.00	100.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	360.00
GOL GOLDEN RULE [GOLDE	140.00	27.45%	370.00	72.55%	0.00	0.00%	0.00	0.00%	0.00	0.00%	510.00
GW GREAT-WEST [GREAT-W	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(15.00)	0.00%	(15.00)
ME MERITAIN [MERITAIN HEA	1,010.00	100.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	1,010.00
MHM AMERIHEALTH HMO [A	460.00	113.58%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(55.00)	0.00%	405.00
NH NOVA [NOVA HEALTHC	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(110.00)	0.00%	(110.00)
OXF OXFORD HEALTH [OXF	1,580.00	40.67%	965.00	24.84%	1,340.00	34.49%	0.00	0.00%	0.00	0.00%	3,885.00
RH2 READING HEALTH [REA	(50.00)	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(189.00)	0.00%	(239.00)
SP SELF-PAY [SELF-PAY]	0.00	0.00%	10.00	3.70%	45.00	16.67%	0.00	0.00%	215.00	79.63%	270.00
UHC UNITED HEALTH [UNITE	13,382.42	94.45%	(1,145.97)	0.00%	(65.00)	0.00%	210.53	1.49%	1,787.14	12.61%	14,169.12
UM UMR [UMR]	1,165.00	32.36%	2,435.00	67.64%	0.00	0.00%	(0.03)	0.00%	0.00	0.00%	3,599.97
25	118,970.21	35.76%	6,434.03	5.18%	2,440.00	1.96%	975.50	0.79%	(4,580.02)	0.00%	124,239.72

About the A/R Aging Analysis: Ins. Payer - Ins. A/R

Path: Reports Menu > A/R Aging Analysis > Ins. Payer - Ins. A/R (A/R Report Type dropdown)
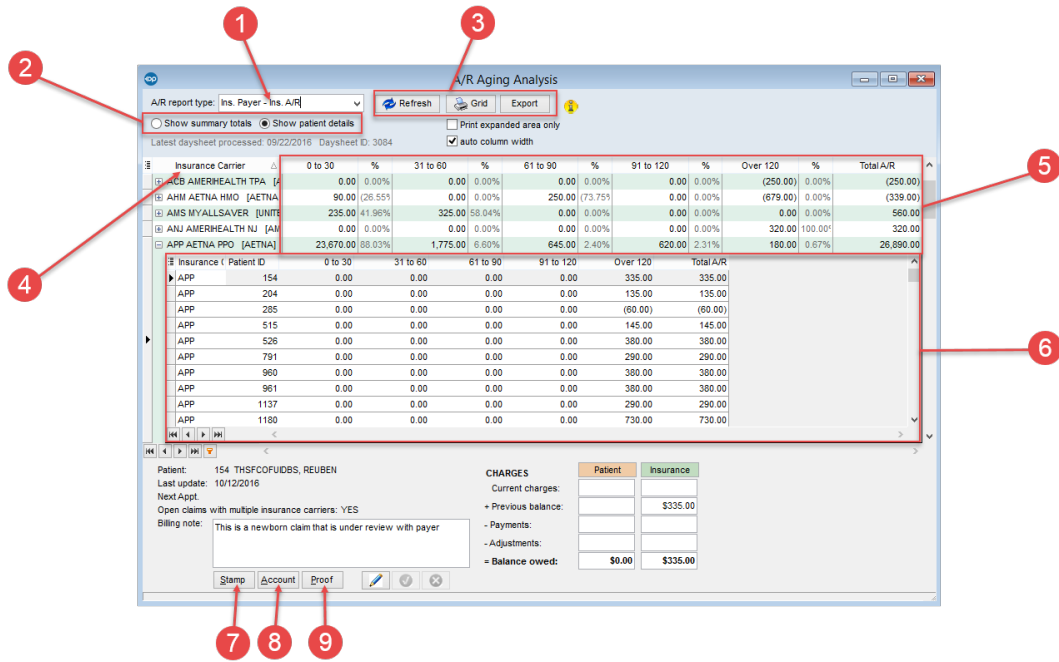
⚠️ **Note**: If you do not see this report option, you will need to be provided a permission from the System Administrator under Security Administration. The report permission is: **OP_Rpts_AR**.

The Ins. Payer - Ins. A/R report allows users to view outstanding Accounts Receivable by Insurance Payer and Insurance Balances. When these reports are selected to "Show patient details" they will provide options for you to add billing notes, Stamp (which allows user to date stamp the "last update" field to the current date), go directly to the patient account, and work claims as necessary. It is recommended for you to run the Proof Patient Account A/R Update prior to working A/R.

⚠️ **Note**: If patient details indicate a balance in a date range bucket that is different from the top row bucket, then the AR_AGING_HISTORY table data is out of date. Re-run the Update function by clicking the **Update** button in the Menu: **Reports > Proof Patient Accounts > Proof Calculations > A/R Data Update Procedures tab** .

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	Details	displayed by the patient ID.
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