A/R Aging Analysis: Insurance Payer - Patient A/R

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Version 14.19

> **Path: Billing tab > A/R button > A/R Aging Analysis > A/R Report Type drop-down >Ins. Payer - Pat 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 - Pat. A/R report displays the practice's Patient Accounts Receivable by Insurance Payer. It displays all outstanding balances due from the patient 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a balance in a date range bucket that is different from the top row bucket, then the AR_AGING_HISTORY table data is out of date.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**.
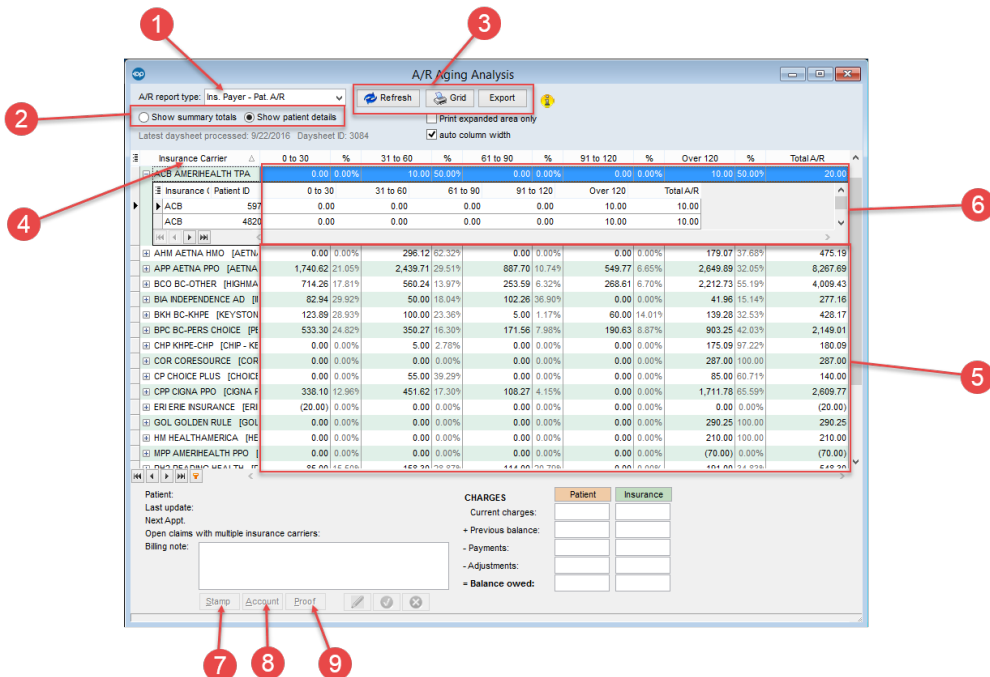
A/R Aging Analysis: Ins. Payer - Pat A/R Map

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

	Type	
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 patient totals. A Sample of the Summary Totals is shown in number 5 on this Ins. Payer - Payer 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 - Payer 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 that are associated with each 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 the "Show Summary Totals" radio button 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	The Insurance Carrier Summary Details display all outstanding insurance balances due from the payer over specified periods of time (0 to 30, 31 to 60, etc).
6	Patient Summary Details	The Patient Summary Details provides patient-level details for the report. Patient accounts are displayed by the Patient ID.
7	Stamp	The **Stamp** button enters a last updated time stamp on the selected patient transaction.
8	Account	The **Account** button opens the **Patient Account** window for the selected patient account.
9	Proof	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 patient balances due from the patient, via the payer type that the balances are sitting, as on the claims screen of the Patient Account. 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 patient A/R that need to be addressed.

A/R Aging Analysis

A/R report type: Ins. Payer - Pat. A/R   Refresh   Grid   Export

○ Show summary totals   ● Show patient details   ☐ Print expanded area only

Latest daysheet processed: 9/22/2016   Daysheet ID: 3084   ☑ auto column width

Insurance Carrier	0 to 30	%	31 to 60	%	61 to 90	%	91 to 120	%	Over 120	%	Total A/R
ACB AMERIHEALTH TPA	0.00	0.00%	10.00	50.00%	0.00	0.00%	0.00	0.00%	10.00	50.00%	20.00
AHM AETNA HMO [AETN	0.00	0.00%	296.12	62.32%	0.00	0.00%	0.00	0.00%	179.07	37.68%	475.19
APP AETNA PPO [AETNA	1,740.62	21.05%	2,439.71	29.51%	887.70	10.74%	549.77	6.65%	2,649.89	32.05%	8,267.69
BCO BC-OTHER [HIGHMA	714.26	17.81%	560.24	13.97%	253.59	6.32%	268.61	6.70%	2,212.73	55.19%	4,009.43
BIA INDEPENDENCE AD [I	82.94	29.92%	50.00	18.04%	102.26	36.90%	0.00	0.00%	41.96	15.14%	277.16
BKH BC-KHPE [KEYSTON	123.89	28.93%	100.00	23.36%	5.00	1.17%	60.00	14.01%	139.28	32.53%	428.17
BPC BC-PERS CHOICE [PE	533.30	24.82%	350.27	16.30%	171.56	7.98%	190.63	8.87%	903.25	42.03%	2,149.01
CHP KHPE-CHP [CHIP - KE	0.00	0.00%	5.00	2.78%	0.00	0.00%	0.00	0.00%	175.09	97.22%	180.09
COR CORESOURCE [COR	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	287.00	100.00	287.00
CP CHOICE PLUS [CHOICE	0.00	0.00%	55.00	39.29%	0.00	0.00%	0.00	0.00%	85.00	60.71%	140.00
CPP CIGNA PPO [CIGNA F	338.10	12.96%	451.62	17.30%	108.27	4.15%	0.00	0.00%	1,711.78	65.59%	2,609.77
ERI ERIE INSURANCE [ERI	(20.00)	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(20.00)
GOL GOLDEN RULE [GOL	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	290.25	100.00	290.25
HM HEALTHAMERICA [HE	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	210.00	100.00	210.00
MPP AMERIHEALTH PPO [	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(70.00)	0.00%	(70.00)
RH2 READING HEALTH [F	85.00	15.50%	158.30	28.87%	114.00	20.79%	0.00	0.00%	191.00	34.83%	548.30
SP SELF-PAY [SELF-PAY	250.00	11.19%	355.00	15.88%	360.00	16.11%	0.00	0.00%	1,270.00	56.82%	2,235.00
UHC UNITED HEALTH [UN	243.54	10.45%	828.63	35.57%	345.15	14.82%	89.31	3.83%	822.86	35.32%	2,329.49
UNI UNICARE [UNICARE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(5.00)	0.00%	(5.00)

Patient:
Last update:
Next Appt.:
Open claims with multiple insurance carriers:
Billing note:

CHARGES   Patient   Insurance
Current charges:
+ Previous balance:
- Payments:
- Adjustments:
= Balance owed:

Stamp   Account   Proof

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

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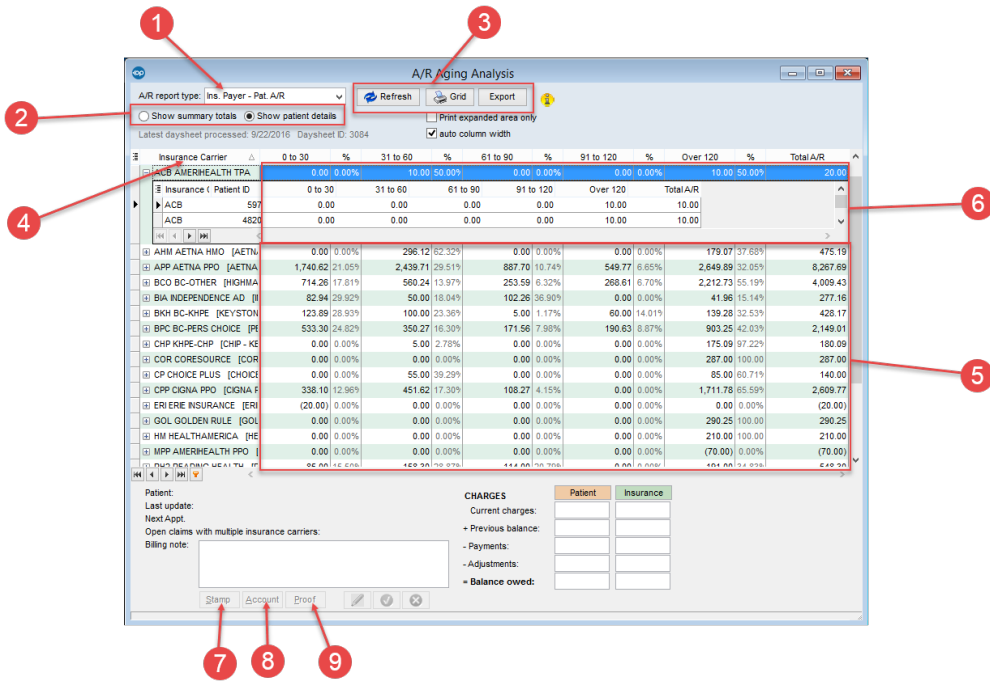
⚠ **Note**: If you do not see this report option, you will need to be provided a permission from the System Administrator under Security Administration. The report permission is: **OP_Rpts_AR**.

This report allows users to view outstanding Accounts Receivable by Insurance Payer and Patient 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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6	Summary Details	displayed by the Patient ID.
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