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

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Version 14.19
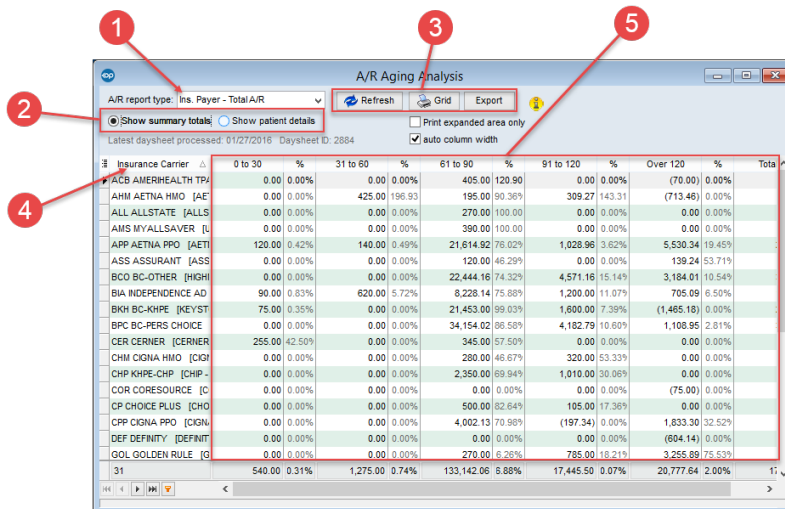
> **Path: Billing tab > A/R button > A/R Aging Analysis > A/R Report Type drop-down > Ins. Payer - Total A/R**

> 🔑 **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

This report displays all outstanding Accounts Receivable by aging bucket and by Insurance and Patient Totals/Insurance Balances. This allows users to see, in a quick glance, the areas of work in your insurance and patient A/R that need to be addressed.

> 📌 **Note**: It is recommended that you run the Proof Patient Account A/R Update prior to working A/R **Billing tab > Proof Patient Accounts > A/R Data Update Procedures tab**.

A/R Aging Analysis: Insurance Payer - Total 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 and patient totals. • **Show Patient Details**: This radio button is not available for this report.
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.
5	Insurance Carrier Summary Details	The 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).

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 and patient balances that are due, 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 see, in a quick glance, the areas of work in your insurance and patient A/R that need to be addressed.

About the A/R Aging Analysis: Insurance Payer - Total A/R

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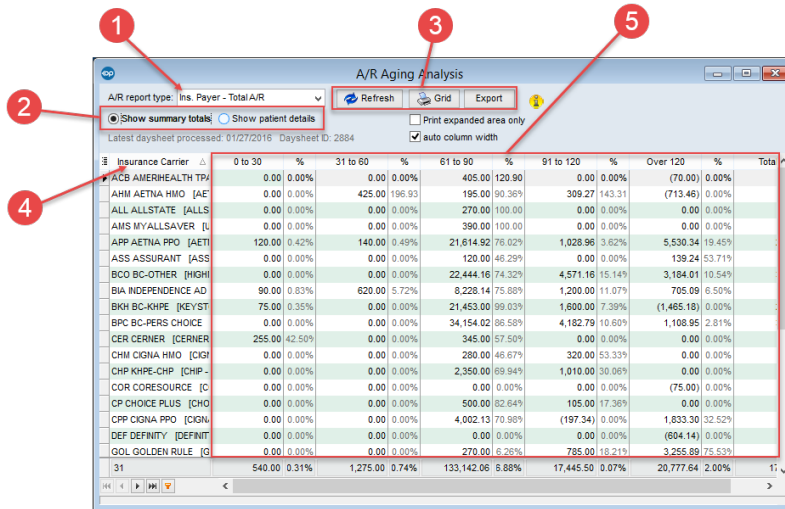
⚠️ **Note**: If you do not see this report option, you will need to be provided a permission from the System Administrator under Security Administration. The report permission is: **OP_Rpts_AR**.

This report displays outstanding Accounts Receivable by Insurance and Patient Totals/Insurance Balances. It is recommended that you 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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