

A/R Aging Analysis: Location - Insurance A/R

Last Modified on 05/04/2021 2:45 pm EDT

Version 14.19

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



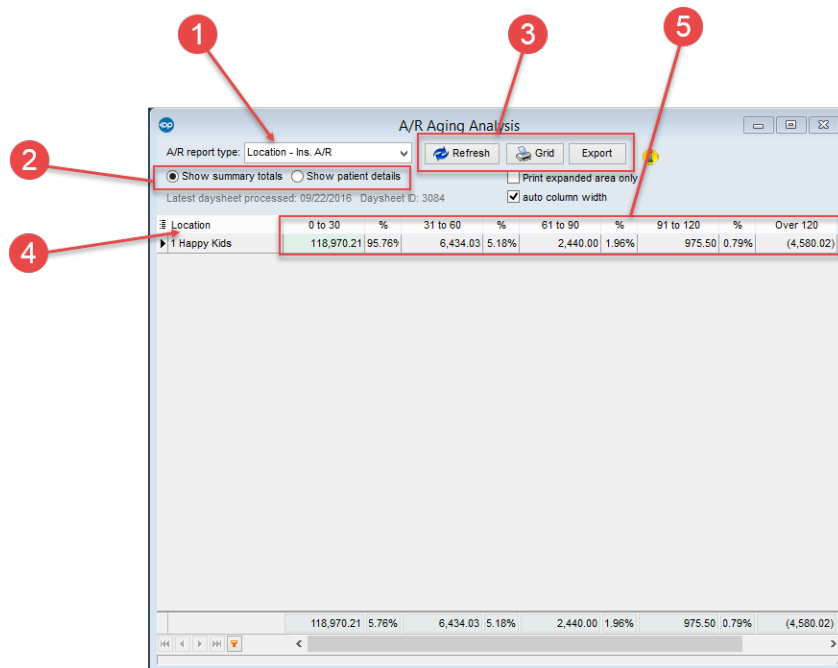
User Permission: If you do not see this report option, you will need to be provided permission `OP_Rpts_AR` by your practice's administrator.

About

This report displays Insurance Accounts Receivable by Location. This allows users to easily see, in a quick glance, the areas of A/R that need to be addressed for individual locations.



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.**



The screenshot shows the 'A/R Aging Analysis' window. Callout 1 points to the 'A/R report type' dropdown menu set to 'Location - Ins. A/R'. Callout 2 points to the radio buttons for 'Show summary totals' (selected) and 'Show patient details'. Callout 3 points to the 'Refresh', 'Grid', and 'Export' buttons. Callout 4 points to the data grid showing a table for 'Happy Kids' with columns for age groups and percentages. Callout 5 points to the 'Print expanded area only' checkbox and the 'auto column width' checkbox.

Location	0 to 30	%	31 to 60	%	61 to 90	%	91 to 120	%	Over 120
Happy Kids	118,970.21	95.76%	6,434.03	5.18%	2,440.00	1.96%	975.50	0.79%	(4,580.02)

A/R Aging Analysis: Location - 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 Totals/Details radio buttons	The radio buttons determine the data that is displayed in the grid: <ul style="list-style-type: none"> Show Summary Totals: The "Show Summary Totals" radio button provides a summary of the insurance carrier totals for the location over a specified period of time. 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	Location	The Location column displays the name of each practice location on each line of the report.
5	Location Summary Details	Location Summary Details displays outstanding Accounts Receivable that are due from the insurance carrier 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 by Location can use this report to see all outstanding insurance balances that are due. This allows users to easily see, in a quick glance, the areas of work in your A/R that need to be addressed for individual locations.

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

Path: Reports Menu > A/R Aging Analysis > Location - Ins. A/R (A/R Report Type dropdown)

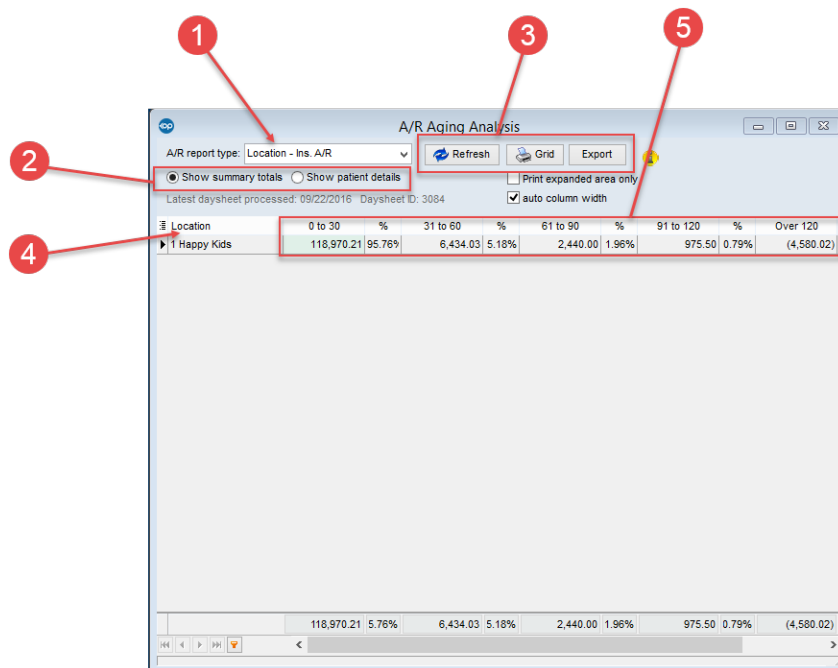


Note: If you do not see this report option, you will need to be provided a permission from the System Administrator under Security Administration. The report permission is: **OP_Rpts_AR**.

This report allows users to view outstanding Accounts Receivable Insurance balances by Location.



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**.



The screenshot shows the 'A/R Aging Analysis' report for 'Location - Ins. A/R'. The interface includes a dropdown menu for the report type (1), a 'Refresh' button (3), and 'Grid' and 'Export' buttons (5). Below the menu, there are radio buttons for 'Show summary totals' (2) and 'Show patient details', and a checked checkbox for 'Print expanded area only'. A 'Latest daysheet processed' date of 09/22/2016 and 'Daysheet ID: 3084' are displayed. The main table shows data for 'Happy Kids' with columns for age ranges (0 to 30, 31 to 60, 61 to 90, 91 to 120, Over 120) and their respective dollar amounts and percentages. A '4' points to the 'Location' column header.

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