

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

Last Modified on 05/04/2021 2:16 pm EDT

Version 14.19

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

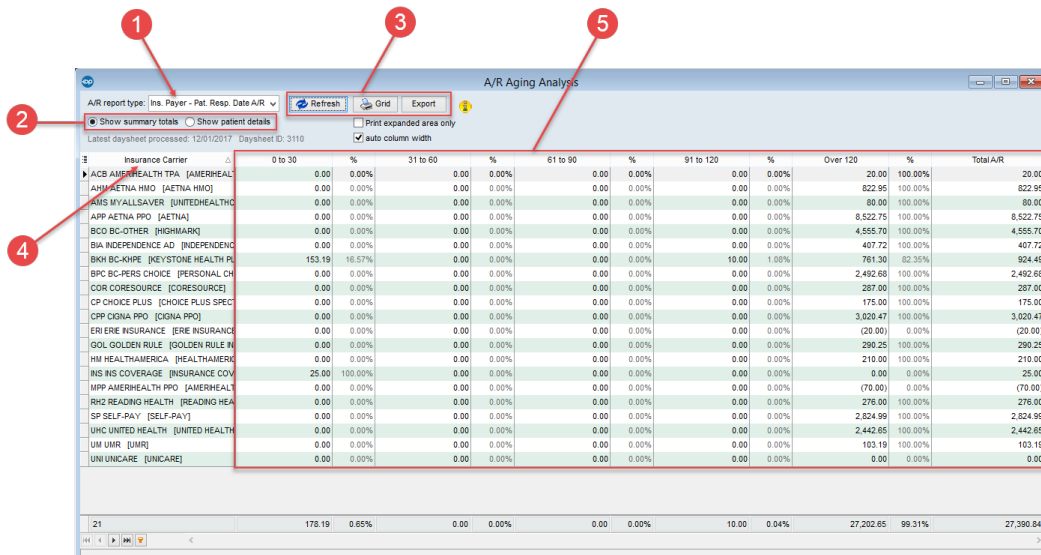
About

This report displays Accounts Receivable for dates when a patient became responsible for a balance.

For example:

- You have a claim from 13 months ago that was just processed by the insurance company for adjudication
- There is a patient responsibility due on the adjudicated claim
- Some offices may not wish to see patient A/R balances that are not accurate to when the patient actually became responsible for a balance, because an insurance payer decided to hold up the processing of a claim

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a balance in a date range bucket that is different from the top row bucket, then the AR_AGING_HISTORY table data is out of date.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**.



The screenshot shows the 'A/R Aging Analysis' report interface. Callout 1 points to the 'A/R report type' dropdown menu. Callout 2 points to the 'Show summary totals' checkbox. Callout 3 points to the 'Refresh' button. Callout 4 points to the 'Show patient details' checkbox. Callout 5 points to the 'Print expanded area only' checkbox. The main table displays columns for date ranges (0 to 30, 31 to 60, 61 to 90, 91 to 120, Over 120) and a Total A/R column. The table lists various insurance carriers and their corresponding A/R amounts and percentages.

	0 to 30	%	31 to 60	%	61 to 90	%	91 to 120	%	Over 120	%	Total A/R
Neurolog Carrier	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	20.00	100.00%	20.00
AACB AMERHEALTH TPA [AMERHEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	822.95	100.00%	822.95
AHM AETNA HMO [AETNA HMO]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	80.00	100.00%	80.00
AMIS MYALLSAVER [UNITEDHEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	8,522.75	100.00%	8,522.75
APP AETNA PPO [AETNA]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	4,555.70	100.00%	4,555.70
BIO BC-OTHER [HIGHMARK]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	407.72	100.00%	407.72
BIA INDEPENDENCE AD [INDEPENDENCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	761.30	82.35%	924.49
BKH BC-KHPE [KEYSTONE HEALTH PLAN]	153.19	16.57%	0.00	0.00%	0.00	0.00%	10.00	1.08%	2,492.68	100.00%	2,492.68
BPC BC-PERS CHOICE [PERSONAL CHOICE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	289.00	100.00%	289.00
CCOR CORESOURCE [CORESOURCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	175.00	100.00%	175.00
CP CHOICE PLUS [CHOICE PLUS SPECIAL]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	3,020.47	100.00%	3,020.47
CRP CIGNA PPO [CIGNA PPO]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(20.00)	0.00%	(20.00)
ERI ERE INSURANCE [ERE INSURANCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	290.25	100.00%	290.25
GOL GOLDEN RULE [GOLDEN RULE INSURANCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	210.00	100.00%	210.00
HM HEALTHAMERICA [HEALTHAMERICA]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	25.00
INS INS COVERAGE [INSURANCE COVERAGE]	25.00	100.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(70.00)	0.00%	(70.00)
MPP AMERHEALTH PPO [AMERHEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	276.00	100.00%	276.00
RH2 READING HEALTH [READING HEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2,324.99	100.00%	2,324.99
SP SELF-PAY [SELF-PAY]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2,442.65	100.00%	2,442.65
UNC UNITED HEALTH [UNITED HEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	103.19	100.00%	103.19
UM UMR [UMR]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
UNI UNICARE [UNICARE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%			
Total	178.19	0.65%	0.00	0.00%	0.00	0.00%	10.00	0.04%	27,202.65	99.31%	27,390.84

A/R Aging Analysis: Insurance Payer - Patient Responsibility Date A/R Map

Number	Section	Description
	A/R Report	

1	Type	Selects the report to display in the A/R Aging Analysis window.
2	Show Totals/Details radio buttons	<p>The radio buttons determine the data that is displayed in the grid:</p> <ul style="list-style-type: none"> • Show Summary Totals: The "Show Summary Totals" radio button provides a summary of the insurance carrier and patient totals for the location over a specified period of time. • 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.
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	<p>The Insurance Carrier column indicates the name of the insurance carrier for each line of the report.</p> <ul style="list-style-type: none"> • 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 "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	The Insurance Carrier Summary Details displays all patient responsibility totals over specified periods of time (0 to 30, 31 to 60, etc).
6	Patient Summary Details (not shown)	The Patient Summary Details provides patient-level totals on the report. Patient accounts are displayed by the patient ID.
7	Stamp button (not shown)	The Stamp button enters a last updated time stamp on the selected patient transaction.
8	Account button (not shown)	The Account button opens the Patient Account window for the selected patient account.
9	Proof button (not shown)	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

Use this report when you are looking to see what the outstanding A/R is for when patients became responsible for a balance due.

For example:

- You have a claim from 13 months ago that was just processed by the insurance company for adjudication.
- There is a patient responsibility due on the adjudicated claim.
- Some offices may not wish to see patient A/R balances that are not accurate to when the patient actually became responsible for a balance, because an insurance payer decided to hold up the processing of a claim.

The screenshot shows the 'A/R Aging Analysis' window for patient MARY 'MK' TUOFJUBQUTF (99). The table lists various insurance carriers with columns for age ranges (0 to 30, 31 to 60, 61 to 90, 91 to 120, Over 12) and percentages. The 'BKH BC-KHPE [KEYST]' carrier is highlighted with a red box, showing a balance of 153.19 (16.57%) in the 0 to 30 range. The right side of the window shows a patient account summary with a balance of 295.00 and a total of 333.19.

About the A/R Aging Analysis: Insurance Payer - Patient Responsibility Date A/R

Path: Reports Menu > A/R Aging Analysis > Ins. Payer - Pat. Resp. Date 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 shows users what is in their Accounts Receivable for dates when a patient became responsible for a balance. You may want to run this report to see how old your outstanding balances may be.

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' window with five numbered callouts: 1 points to the 'Refresh' button, 2 points to the 'Show summary totals' checkbox, 3 points to the 'Grid' button, 4 points to the 'Print expanded area only' checkbox, and 5 points to the 'Export' button. The table below shows the data for various insurance carriers.

Insurance Carrier	0 to 30	%	31 to 60	%	61 to 90	%	91 to 120	%	Over 120	%	Total A/R
ACB AMERHEALTH [AMERHEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	20.00	100.00%	20.00
AHM AETNA HMO [AETNA HMO]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	822.95	100.00%	822.95
AMS MYALLSAVER [UNITEDHEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	80.00	100.00%	80.00
APP AETNA PPO [AETNA]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	8,522.75	100.00%	8,522.75
BCO BC-OTHER [HIGHMARK]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	4,555.70	100.00%	4,555.70
BIA INDEPENDENCE AD [INDEPENDENCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	407.72	100.00%	407.72
BKH BC-KHPE [KEYSTONE HEALTH PL]	153.19	16.57%	0.00	0.00%	0.00	0.00%	10.00	1.08%	761.30	82.35%	924.49
BPC BC-PERS CHOICE [PERSONAL CHOICE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2,492.68	100.00%	2,492.68
COR CORESOURCE [CORESOURCE]	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 PLUS SPEC]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	175.00	100.00%	175.00
CPZ CIGNA PPO [CIGNA PPO]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	3,029.47	100.00%	3,029.47
ERI ERE INSURANCE [ERE INSURANCE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	(20.00)	0.00%	(20.00)
GOL GOLDEN RULE [GOLDEN RULE IN]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	290.25	100.00%	290.25
HM HEALTHAMERICA [HEALTHAMERICA]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	210.00	100.00%	210.00
INS INS COVERAGE [INSURANCE COV]	25.00	100.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	25.00
MPP AMERHEALTH PPO [AMERHEALTH]	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 [READING HEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	276.00	100.00%	276.00
SP SELF-PAY [SELF-PAY]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2,824.99	100.00%	2,824.99
UHC UNITED HEALTH [UNITED HEALTH]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2,442.85	100.00%	2,442.85
UM UMR [UMR]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	103.19	100.00%	103.19
UNI UNICARE [UNICARE]	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
21	178.19	0.65%	0.00	0.00%	0.00	0.00%	10.00	0.04%	27,202.85	99.31%	27,380.84

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7	Stamp button (not shown)	<p>The Stamp button enters a last updated time stamp on the selected patient transaction.</p>
8	Account button (not shown)	<p>The Account button opens the Patient Account window for the selected patient account.</p>
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