A/R Aging Analysis: Insurance Payer - Secondary Payer Resp. Date A/R

Last Modified on 05/04/2021 1:52 pm EDT

Version 14.19

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

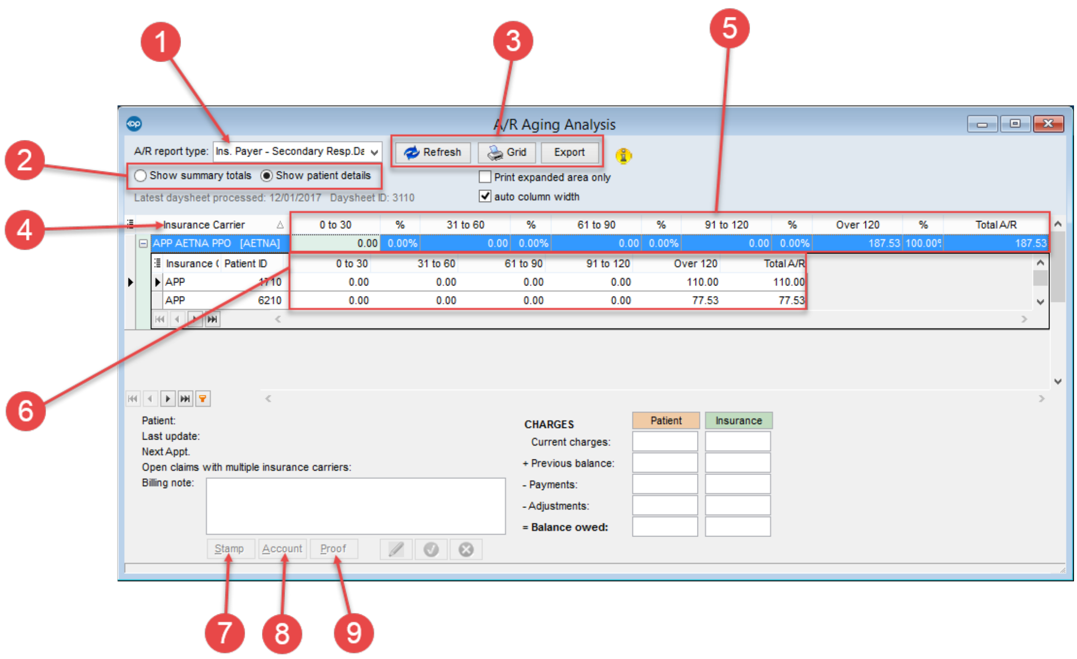
About

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

For example:

- You have a claim that was finally processed by the insurance company for adjudication
- There is a secondary insurance on file with the patient responsibility due on that adjudicated claim
- The claim gets a balance billed to the secondary payer on file
- Some offices may wish to see patient A/R balances for when a secondary payer became responsible for balances rather than just view the age of the 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a balance in a date range bucket that is different from the top row bucket, then the AR_AGING_HISTORY table data is out of date.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**.



Insurance Payer - Secondary Payer Responsibility Date 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: • **Show Summary Totals**: The "Show Summary Totals" radio button provides a summary of the secondary insurance carrier totals for a specified period of time. • **Show Patient Details**: The "Show Patient Details" radio button provides patient-level details for each secondary 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	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 secondary insurance carrier. The patients are listed by Patient ID. The patient IDs are displayed by clicking the "+" icon next to the selected secondary insurance carrier name. • Selecting "Show Summary Totals" will only show a high-level report that lists each secondary insurance carrier's amounts over time. The "+" icon is not displayed.
5	Insurance Carrier Summary Details	The Insurance Carrier Summary Details displays all secondary insurance carrier responsibility totals over specified periods of time (0 to 30, 31 to 60, etc).
6	Patient Summary Details	The Patient Summary Details provides patient-level totals on 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.

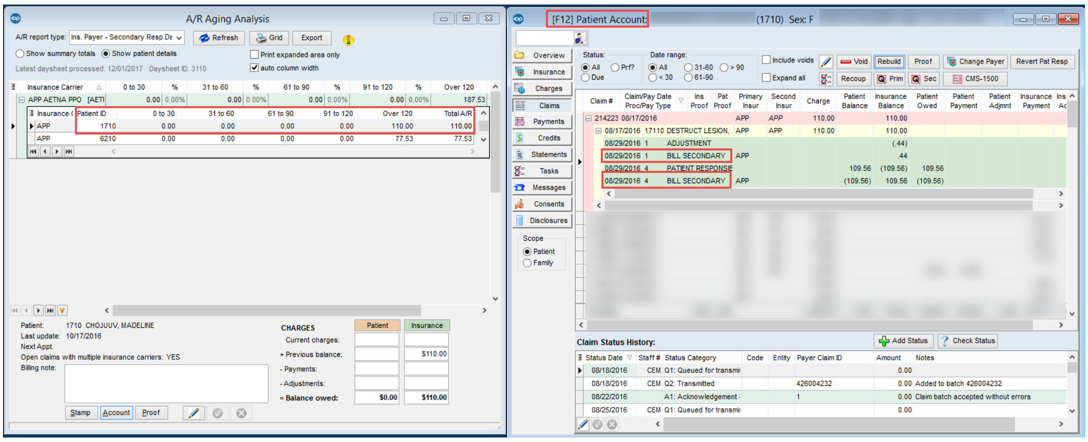
Version 14.10

When to Use this Report

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

For example:

- You have a claim that was finally processed by the insurance company for adjudication.
- There is a secondary insurance on file with the patient responsibility due on that adjudicated claim.
- The claim gets a balance billed to the secondary payer on file.
- Some offices may wish to see patient A/R balances for when a secondary payer became responsible for balances rather than just view the age of the claim.



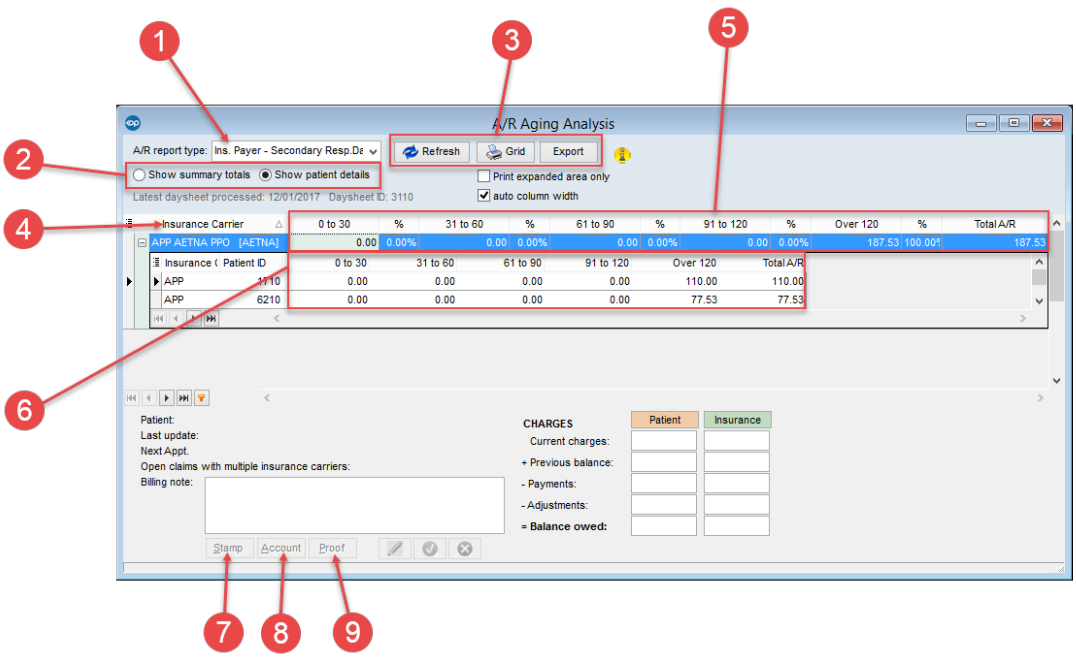
About the A/R Aging Analysis: Insurance Payer - Secondary Payer Responsibility Date A/R

> **Path: Reports Menu > A/R Aging Analysis > Ins. Payer - Secondary 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**.

If there are users that wish to see what is in their Accounts Receivable for when a Secondary Insurance Payer became responsible for a balance, they 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**.



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