SQL: Basic A/R for Open Claims for Dates
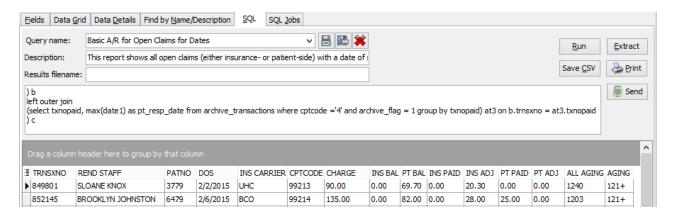
Last Modified on 01/06/2022 9:54 am EST

> ⓘ There are **two versions** of this SQL: Firebird and MySQL. The **MySQL version** only applies to clients who are **BETA testing MySQL**. All other Practices should continue to use the Firebird version of this code. Click to expand and copy the code you need. If you are unsure which code to use, please check with your Practice Administrator.

About

This report shows all open claims (either insurance-side or patient-side) with a date of service between the dates you specify. It also assigns an aging bucket of <30, 31-60, 61-90, 91-120, and 121+.

A sample image of this SQL report run in the Database Viewer is shown below:

Caveats

- Any claim with a nonzero insurance balance OR a nonzero patient balance is shown.
- ALL_AGING is the computed days of aging.

  - For insurance-side balances, ALL_AGING is the difference between the date of service and the run date. This report does not re-start aging with re-assignment to secondary insurances.
  - For patient_side balances, ALL_AGING is the difference between the patient responsibility date and the run date.

- Only archived transactions and non-voided transactions are shown.

SQL Code: Firebird

To highlight and copy the code below to your clipboard, simply click the **Copy** button.

Copy

```
select trnsxno, rend_staff, patno, dos, ins_carrier_code, cptcode, charge, ins_balance, pt_balance, p1 as ins_paid, a1 as ins_adj, c1 as pt_paid, w1 as pt_adj, all_aging, case when all_aging <=30 then '0-30' when all_aging >30 and all_aging <=60 then '31-60' when all_aging >60 and all_aging <=90 then '61-90' when all_aging >90 and all_aging <=120 then '91-120' else '121+' end as aging from
(
select b.*, case when ins_balance >= 0.01 then cast('today' as date)-dos  when pt_balance >=0.01 then cast('today' as date)- coalesce(pt_resp_date,dos) end as all_aging from
(
select a.* from
(
select trnsxno,staffname as rend_staff, patno,  date1 as DOS, ins_carrier_code, cptcode,  charge, tx_balance as ins_balance, copaybalance as pt_balance, coalesce(p,0) as  p1, coalesce(a,0) as a1, coalesce( c,0) as c1,coalesce(w,0) as w1 from
(select
 trnsxno, patno, rend_addr_id, cptcode, date1, ins_carrier_code, charge, tx_balance, copaybalance from archive_transactions where date1 between :startdate and :enddate and cptcode not in ('1','2','3','4') and archive_flag = 1) at1
left outer join
(select txnopaid,  sum(payment) as p,  sum(adjustment) as a, sum(copayrecd) as c, sum(copayadjustment) as w from archive_transactions where archive_flag = 1 group by txnopaid) at2 on at2.txnopaid = at1.trnsxno
left outer join
staff1 on staff1.staffid = at1.rend_addr_id
) a
where abs(charge - p1-a1-c1-w1 )>=0.01 and (ins_balance >= 0.01 or pt_balance >=0.01)
) b
left outer join
(select txnopaid, max(date1) as pt_resp_date from archive_transactions where cptcode ='4' and archive_flag = 1 group by txnopaid) at3 on b.trnsxno = at3.txnopaid
) c
```

SQL Code: MySQL

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Copy

```
select trnsxno, rend_staff, patno, dos, ins_carrier_code, cptcode, charge, ins_balance, pt_balance, p1 as ins_paid, a1 as i
ns_adj, c1 as pt_paid, w1 as pt_adj, all_aging, case when all_aging <=30 then '0-30' when all_aging >30 and all_aging <
=60 then '31-60' when all_aging >60 and all_aging <=90 then '61-90' when all_aging >90 and all_aging <=120 then '91-
120' else '121+'  end as aging from
(
select b.*, case when ins_balance >= 0.01 then cast('today' as date)-dos  when pt_balance >=0.01 then cast('today' as
date)- coalesce(pt_resp_date,dos) end as all_aging from
(
select a.* from
(
select trnsxno,staffname as rend_staff, patno,  date1 as DOS, ins_carrier_code, cptcode,  charge, tx_balance as ins_bala
nce, copaybalance as pt_balance, coalesce(p,0) as  p1,
coalesce(a,0) as a1, coalesce( c,0) as c1,coalesce(w,0) as w1 from
(select
 trnsxno, patno, rend_addr_id, cptcode, date1, ins_carrier_code, charge, tx_balance, copaybalance from archive_transact
ions where date1 between :startdate and :enddate and cptcode not in ('1','2','3','4')
 and archive_flag = 1) at1
left outer join
(select txnopaid,  sum(payment) as p,  sum(adjustment) as a, sum(copayrecd) as c, sum(copayadjustment) as w from a
rchive_transactions where archive_flag = 1 group by txnopaid) at2 on at2.txnopaid = at1.trnsxno
left outer join
staff1 on staff1.staffid = at1.rend_addr_id
) a
where abs(charge - p1-a1-c1-w1 )>=0.01 and (ins_balance >= 0.01 or pt_balance >=0.01)
) b
left outer join
(select txnopaid, max(date1) as pt_resp_date from archive_transactions where cptcode ='4' and archive_flag = 1 group
by txnopaid) at3 on b.trnsxno = at3.txnopaid
) c
```