

SQL: Patient Balances, Aged with Patient Status, Guarantor, PCP, and Next Appt

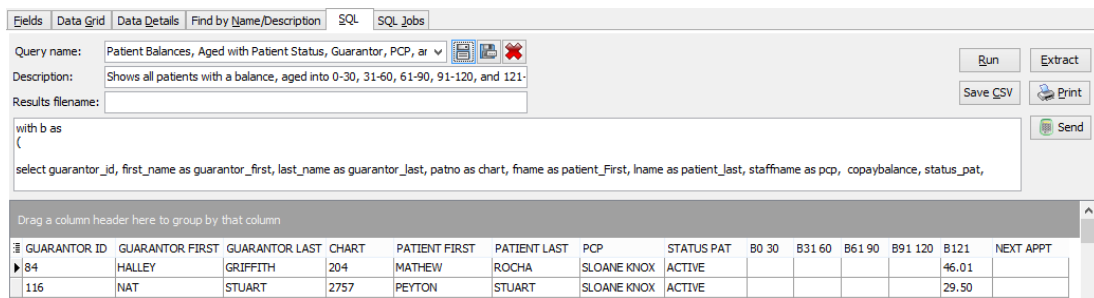
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i There are **two versions** of this SQL: Firebird and MySQL. The **MySQL version** only applies to clients who are **BETA testing MySQL**. All other Practices should continue to use the Firebird version of this code. Click to expand and copy the code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

About

This report shows all patients with a balance, aged into 0-30, 31-60, 61-90, 91-120, and 121+ day buckets. This report also shows guarantor ID and name, patient status PCP, and the next appointment scheduled (if applicable).

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



The screenshot shows the Database Viewer interface with the following details:

- Query name:** Patient Balances, Aged with Patient Status, Guarantor, PCP, ar
- Description:** Shows all patients with a balance, aged into 0-30, 31-60, 61-90, 91-120, and 121+
- Results filename:** (empty)
- SQL Code:**

```
with b as
(
select guarantor_id, first_name as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_first, lname as patient_last, staffname as pcp, copaybalance, status_pat,
```
- Table Columns:**

GUARANTOR ID	GUARANTOR FIRST	GUARANTOR LAST	CHART	PATIENT FIRST	PATIENT LAST	PCP	STATUS PAT	B0 30	B31 60	B61 90	B91 120	B121	NEXT APPT
84	HALLEY	GRIFFITH	204	MATHEW	ROCHA	SLOANE KNOX	ACTIVE					46.01	
116	NAT	STUART	2757	PEYTON	STUART	SLOANE KNOX	ACTIVE					29.50	

Caveats

- “Aging” is defined as how many days between the run date and patient responsibility date. Patient responsibility date is defined as the date on which the insurance company adjudicated the claim and sent a balance to patient responsibility.
- This report may take 30-45 seconds to execute if you have a large practice and/or many open balances.

SQL Code: Firebird

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

Copy

with b as

(

```
select guarantor_id, first_name as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffname as pcp, copaybalance, status_pat, effective_dor,
datediff(day, cast(effective_dor as date), cast('today' as date)) as elapsed, case when datediff(day, cast(effective_dor as date), cast('today' as date)) < 31 then '0-30' when datediff(day, cast(effective_dor as date), cast('today' as date)) < 61 then '31-60' when datediff(day, cast(effective_dor as date), cast('today' as date)) < 91 then '61-90' when datediff(day, cast(effective_dor as date), cast('today' as date)) < 121 then '91-120' else '121+' end as buckets
```

from

(

```
select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 end as effective_dor, fname, lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and cptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
```

```
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2','4')) at2 on at2.txnopa id = at1.trnsxno
```

```
inner join register on register.patno = at1.patno
```

```
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
```

```
inner join contact on contact.id = register.guarantor_id
```

```
order by patno
```

)

)

```
select distinct guarantor_id, guarantor_first, guarantor_last, b.chart, patient_first, patient_last, pcp, status_pat,
a1.b1 as B0_30, a2.b2 as B31_60, a3.b3 as B61_90, a4.b4 as B91_120, a5.b5 AS B121, next_appt
```

from b

```
left outer join (select coalesce(sum(copaybalance),0) as b1, chart from b where buckets='0-30' group by chart) a1 on a1.chart = b.chart
```

```
left outer join (select coalesce(sum(copaybalance),0) as b2, chart from b where buckets='31-60' group by chart) a2 on a2.chart = b.chart
```

```
left outer join (select coalesce(sum(copaybalance),0) as b3, chart from b where buckets='61-90' group by chart) a3 on a3.chart = b.chart
```

```
left outer join (select coalesce(sum(copaybalance),0) as b4, chart from b where buckets='91-120' group by chart) a4 on a4.chart = b.chart
```

```
left outer join (select coalesce(sum(copaybalance),0) as b5, chart from b where buckets='121+' group by chart) a5 on a5.chart = b.chart
```

```
left outer join (select patno, min(appt_Date) as next_appt from schedule where visit_status is null and appt_date >= cast('today' as date) group by patno) s on s.patno = b.chart
```

SQL Code: MySQL

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

Copy

```
select distinct guarantor_id, guarantor_first, guarantor_last, b.chart, patient_first, patient_last, pcp, status_pat,
a1.b1 as B0_30, a2.b2 as B31_60, a3.b3 as B61_90, a4.b4 as B91_120, a5.b5 AS B121, next_appt
from (select distinct trnsxno, guarantor_id, first_name as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffname as pcp, copaybalance, status_pat, effective_dor,
timestampdiff(day, cast(effective_dor as date), curdate()) as elapsed, case when timestampdiff(day, cast(effective_dor as date), curdate()) < 31 then '0-30'
when timestampdiff(day, cast(effective_dor as date), curdate()) < 61 then '31-60' when timestampdiff(day, cast(effective_dor as date), curdate()) < 91 then '61-90'
```

```

--
when timestampdiff(day,cast(effective_dor as date),curdate()) < 31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnpaid
= at1.trnsxno
inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1) b
left outer join (select coalesce(sum(copaybalance),0) as b1, chart from (select distinct trnsxno, guarantor_id, first_name
as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffnam
e as pc, copaybalance, status_pat, effective_dor,
timestampdiff(day,cast(effective_dor as date),curdate()) as elapsed, case when timestampdiff(day,cast(effective_dor as
date),curdate()) < 31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 61 then '31-60' when timestampdiff(day,cast(effective_
dor as date),curdate()) < 91 then '61-90'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnpaid
= at1.trnsxno
inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1) b where buckets='0-30' group by chart) a1 on a1.chart = b.chart
left outer join (select coalesce(sum(copaybalance),0) as b2, chart from (select distinct trnsxno, guarantor_id, first_name
as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffnam
e as pc, copaybalance, status_pat, effective_dor,
timestampdiff(day,cast(effective_dor as date),curdate()) as elapsed, case when timestampdiff(day,cast(effective_dor as
date),curdate()) < 31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 61 then '31-60' when timestampdiff(day,cast(effective_
dor as date),curdate()) < 91 then '61-90'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnpaid
= at1.trnsxno
inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1) b where buckets='31-60' group by chart) a2 on a2.chart = b.chart
left outer join (select coalesce(sum(copaybalance),0) as b3, chart from (select distinct trnsxno, guarantor_id, first_name
as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffnam
e as pc, copaybalance, status_pat, effective_dor,
timestampdiff(day,cast(effective_dor as date),curdate()) as elapsed, case when timestampdiff(day,cast(effective_dor as
date),curdate()) < 31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 61 then '31-60' when timestampdiff(day,cast(effective_
dor as date),curdate()) < 91 then '61-90'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnpaid
= at1.trnsxno

```

```

inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1) b where buckets='61-90' group by chart) a3 on a3.chart = b.chart
left outer join (select coalesce(sum(copaybalance),0) as b4, chart from (select distinct trnsxno, guarantor_id, first_name
as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffnam
e as pcp, copaybalance, status_pat, effective_dor,
timestampdiff(day,cast(effective_dor as date),curdate()) as elapsed, case when timestampdiff(day,cast(effective_dor as
date),curdate()) <31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) <61 then '31-60' when timestampdiff(day,cast(effective_
dor as date),curdate()) < 91 then '61-90'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnopa
id = at1.trnsxno
inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1) b where buckets='91-120' group by chart) a4 on a4.chart = b.chart
left outer join (select coalesce(sum(copaybalance),0) as b5, chart from (select distinct trnsxno, guarantor_id, first_name
as guarantor_first, last_name as guarantor_last, patno as chart, fname as patient_First, lname as patient_last, staffnam
e as pcp, copaybalance, status_pat, effective_dor,
timestampdiff(day,cast(effective_dor as date),curdate()) as elapsed, case when timestampdiff(day,cast(effective_dor as
date),curdate()) <31 then '0-30'
when timestampdiff(day,cast(effective_dor as date),curdate()) <61 then '31-60' when timestampdiff(day,cast(effective_
dor as date),curdate()) < 91 then '61-90'
when timestampdiff(day,cast(effective_dor as date),curdate()) < 121 then '91-120' else '121+' end as buckets
from (select at1.*, at2.date1 as dor, at2.cptcode as orig_cpt, case when at2.date1 is null then at1.date1 else at2.date1 e
nd as effective_dor, fname,lname, guarantor_id, staffname, first_name, last_name, status_pat from
(select patno, invoiceno, trnsxno, date1, cptcode, copaybalance from archive_Transactions where archive_flag = 1 and c
ptcode not in ('1','2','4','RECHK') and copaybalance >= 0.01) at1
left outer join (Select * from archive_transactions where archive_flag = 1 and cptcode not in ('1','2')) at2 on at2.txnopa
id = at1.trnsxno
inner join register on register.patno = at1.patno
INNER JOIN STAFF1 on staff1.staffid = register.addr_id
inner join contact on contact.id = register.guarantor_id
order by patno ) t1)b where buckets='121+' group by chart) a5 on a5.chart = b.chart
left outer join (select patno, min(appt_Date) as next_appt from schedule where visit_status is null and appt_date >= cur
date() group by patno) s on s.patno = b.chart

```