

# Financial Analytics: Insurance A/R Worklist

Last Modified on 10/15/2021 4:30 pm EDT

Version 20.14

This is a contracted feature available to OP Cloud Practices. Contact your Client Account Manager for more information.


Path: Tools tab > Financial Analytics button > Insurance AR Worklist

### Insurance A/R


**Type of report:** Bar-graph

**Displays:** A vertical representation of Insurance A/R by aging bucket: 0-30, 31-60, 61-90, and Over 120.

**Drill-down:**

- Hovering over a specific bar displays the sum of the Insurance A/R in each bucket.
- Clicking on a specific bar populates the Worklist grid with the patient claims that contribute to that bucket.
- If you have a bar selected but want to change the view to see a Worklist of all Insurance A/R, click the **clear filters** button .

Insurance A/R



### Worklist

**Type of report:** Worklist

**Displays:** A list of claims with balances that contribute to the Insurance A/R aging bucket selected in the Insurance A/R panel of the window (if selected, see above). The following columns are included, and the column headers can be clicked to sort the information. The claim number, listed in the **Claim Number** column, is clickable and takes you directly to the Claims section of the patient's chart.

Patient Number	Claim Number	Patient Name	Date of Service	Balance	Provider	Payer
1225	<a href="#">177218</a>	KYLA WILLIAMSON	1/22/2021	\$25.01	Demo Doctor, MD	BCBS CAREFIRST
1225	<a href="#">177219</a>	KYLA WILLIAMSON	1/22/2021	\$80.00	Demo Doctor, MD	BCBS CAREFIRST

Version 20.13

This content is intended for use by OP RCM Clients only.


Path: Tools tab > Financial Dashboards button > Insurance AR Worklist

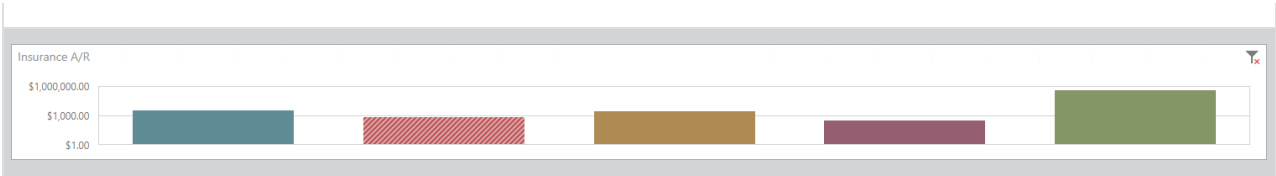
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### Worklist

**Type of report:** Worklist

**Displays:** A list of claims whose balances contribute to the A/R aging bucket selected in the Insurance A/R panel of the window, if selected (see above). The following columns are included, and the column headers can be clicked to sort the information:

Patient Number	Claim Number	Patient Name	Date of Service ↑	Balance	Provider	Payer
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