

# SQL: Insurance Aging by Insurance Company

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## About

This SQL provides you with aging of all balances, grouped by payer and aging bucket (e.g. 0-30, 31-60, etc). Insurance balances and patient balances are shown separately.

## Caveats

- Aging dates from the date of service for insurance balances.
- Aging dates from the patient responsibility date for patient balances, if the patient responsibility date exists. If not, it dates from the date of service.

## SQL Code

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

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```
with ar as (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 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 where patno >99)

select ins_carrier_code,
round(sum(ins_balance),2) as total_ins_bal, round(sum(pt_balance),2) as
total_pt_bal, aging from (select * from ar) group by ins_carrier_code,
aging order by ins_carrier_code, aging
```