Financial Analytics (PA): Patient A/R Summary & Worklist

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 This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

Version 21.3

> **Path: Tools tab > Reporting button > Financial Analytics > Patient A/R Summary & Worklist**

When to Use this Report

Use this dashboard to work your outstanding patient A/R. You can view your patient A/R by bucket and drill down into the worklist to view the specific patients/claims with the outstanding balance.

> **Note**: This dashboard is based on the Patient Responsibility Age, and not the Date of Service. Therefore this data will not match the Patient A/R in the Billing Center > Overview > A/R Summary tab since that pulls data based on the Date of Service.

About Patient A/R Summary & Worklist

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Patient A/R Summary Filters

Number	Section	Description
1	Provider	Use this filter to select a provider(s) associated patients with outstanding balances.
2	Location	Use this filter to select the Location(s) of the patients with outstanding balances.
3	Bucket	Use this filter to select the A/R Aging bucket you wish to view.

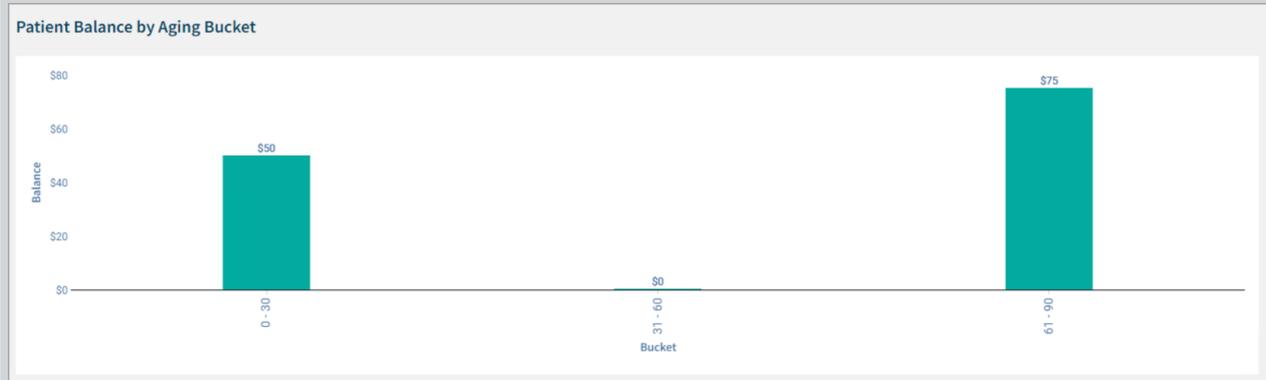## Patient A/R Summary Overview

Patient Balance by Aging Bucket

Type of report: Bar Graph

Displays: This shows the patient balance in the aging buckets based on date it became the patient responsibility.

Details:

• Balance: The dollar amount of the combined patient balances.

• Bucket: The A/R Aging bucket that the patient balance falls into.

Patient Balance by Rendering and Claim Summary

Type of report: Bar Graph

Displays: This shows the patient balance by rendering provider and the total claim count.

Details:

• Balance: The dollar amount of the patient balance.

• Rendering Provider: The name of the rendering provider for that patient balance.

• Total Claims: The number of total claims for each rendering provider.
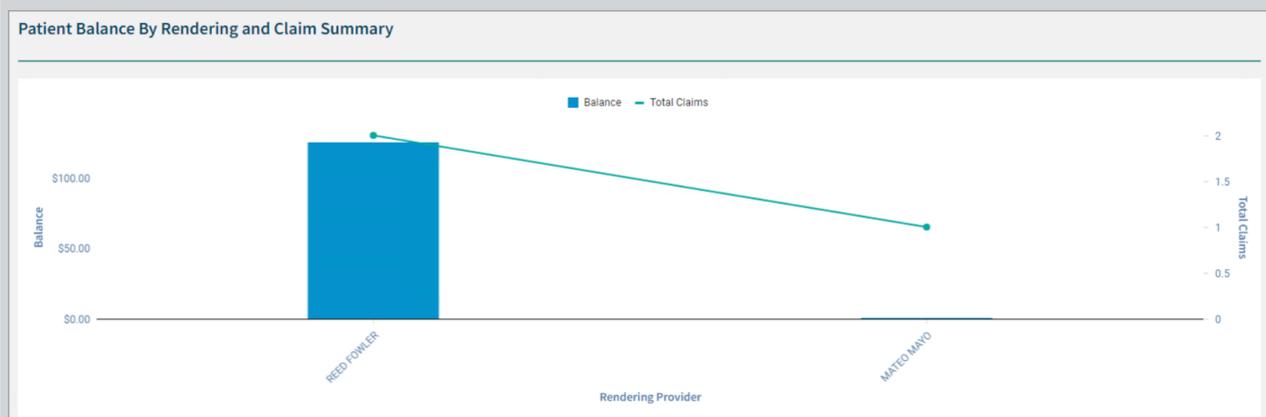
Patient Balance by CPT Category, Patient Count, and Claim Summary

Type of report: Map

Displays: This shows the patient balance by CPT Category, the total claims and total patient count.
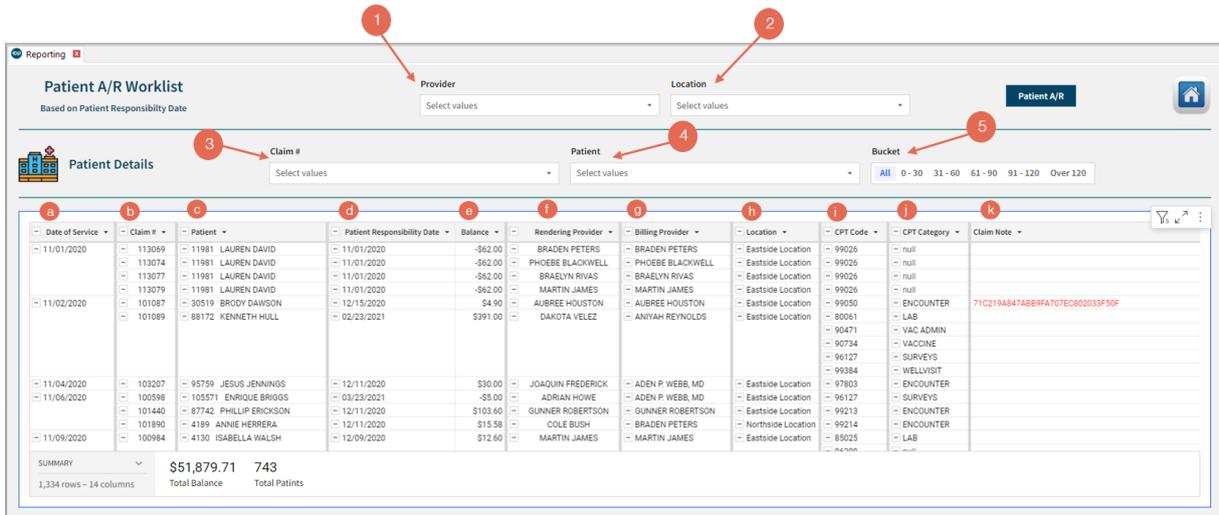
Details:

• CPT Category: Click the CPT Category button to view the balance per CPT Category, with the total number of claims for each category.

• CPT Code: Click the CPT Code button to view the balance per specific CPT Code, with the total number of claims for each code.
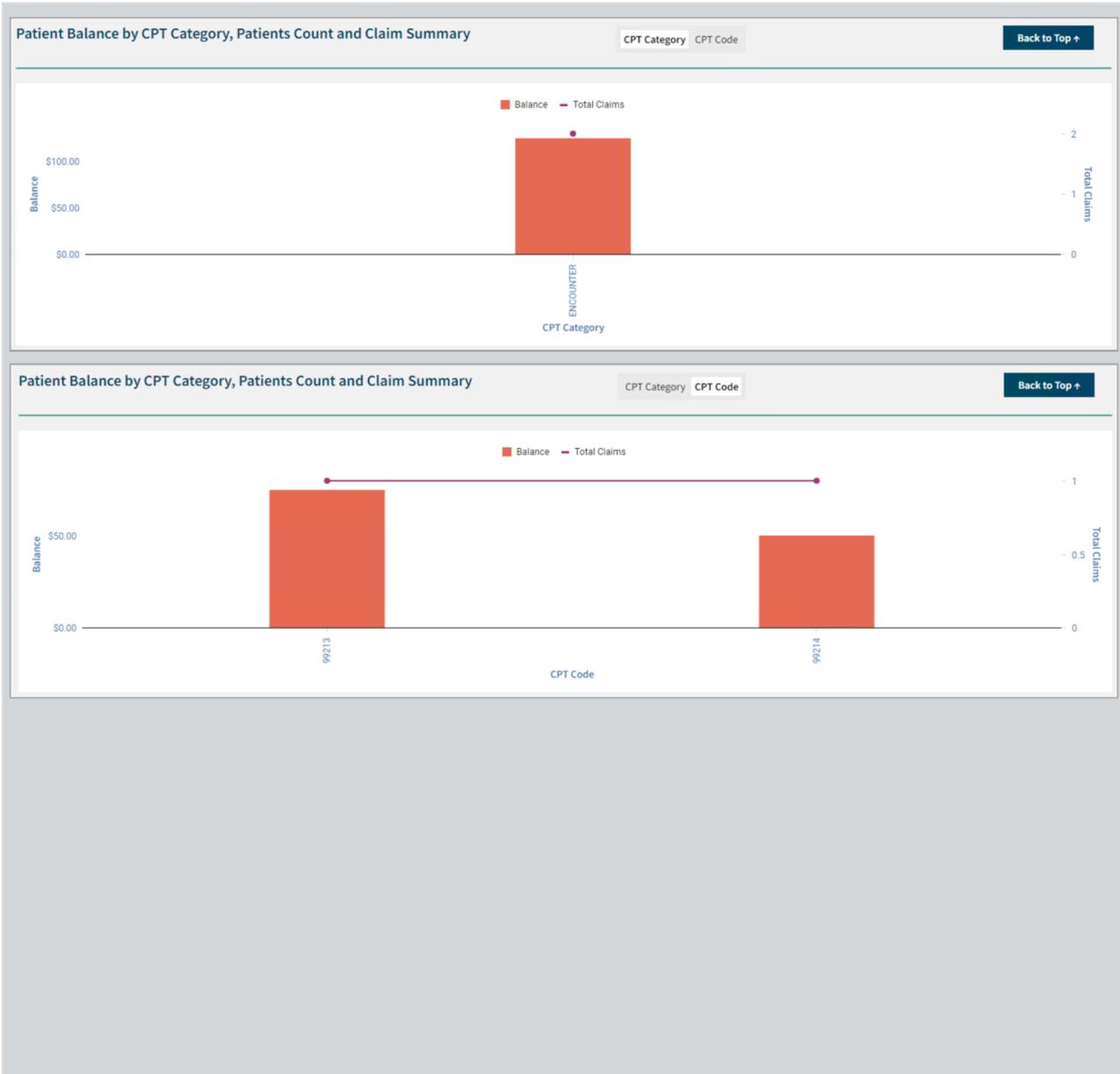
Patient A/R Worklist Overview

This shows the patient details for the outstanding patient balances. To access, click the **Worklist** button at the top right of the Patient A/R Summary dashboard.

Number	Section	Description
1	Provider	Use this filter to select a provider(s) and view their patients with outstanding balances.
2	Location	Use this filter to select a location(s) and view those patients with outstanding balances.
3	Claim #	Use this filter to select a Claim number with an outstanding balance.
4	Patient #	Use this filter to select a Patient number with an outstanding balance.
5	Bucket	Use this filter to select the A/R Aging bucket you wish to view.
a	Date of Service	The Date of Service column displays the date of service for the associated balance.
b	Claim #	The Claim # column displays the Claim number for the claim with an outstanding balance. These are grouped and you can expand/minimize the claim number to see all of the outstanding balances associated with it.
c	Patient	The Patient column displays the full name of the patient associated with the outstanding balance.
d	Patient Responsibility Date	The Patient Responsibility Date column displays the date of the associated balance. This date is what the Patient Responsibility Age is based on.
e	Balance	The Balance column displays the outstanding patient balance for the indicated claim.
f	Rendering Provider	The Rendering Provider column displays the provider who rendered the service associated with the claim.
g	Billing Provider	The Billing Provider column displays the provider with Billing Credentials that billed for the service.
h	Location	The Location column displays the location for the appointment. This is useful for practices that have multiple locations.
i	CPT Code	The CPT code column lists the medical code for the visit on the date of service.
j	CPT Category	The CPT Category column lists the category for the medical code (CPT) for the visit on the date of service.
k	Claim Note	The Claim Note column displays any claim notes associated with the claim.
other	Bucket	The Bucket column displays A/R Aging bucket the balance is currently in (0-30, 31-60, etc).