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

Last Modified on 10/01/2024 9:46 am EDT

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

Version 21.3

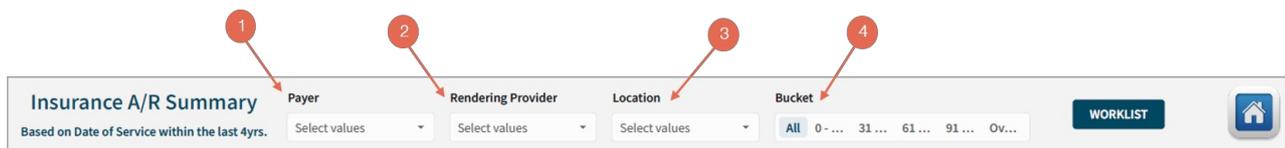> **Path: Tools tab > Reporting button > Financial Analytics > Insurance A/R Summary**

When to Use this Report

Use this dashboard to view outstanding Insurance A/R and work the outstanding claims from the worklist. You can see your providers and payers with the highest outstanding A/R. This dashboard looks to only outstanding A/R with an insurance company and excludes claims with a Self-Pay payer.

About Insurance A/R Summary & Worklist

- Insurance A/R Summary Filters
- Insurance A/R Summary Overview
- Insurance A/R Worklist Filters
- Insurance A/R Worklist

Insurance A/R Summary Filters

Number	Section	Description
1	Payer	Use this filter to select the payer(s) you wish to search by.
2	Rendering Provider	Use this filter to select a provider(s) who performed the service with an outstanding balance.
3	Location	Use this filter to select the Location(s) of the patients with outstanding balances.
4	Bucket	Use this filter to select the A/R Aging bucket you wish to view.

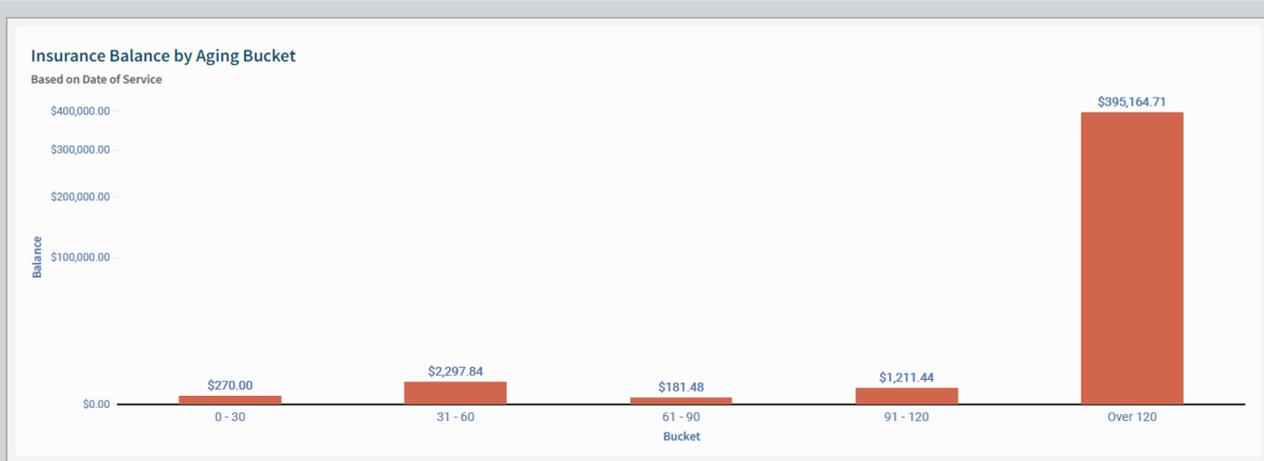## Insurance A/R Summary Overview

Insurance Balance by Aging Bucket

Type of report: Bar Graph

Displays: This shows the outstanding Insurance A/R by age (0-30 days, 31-60, 61-90, 90-120, 120+).

Details:

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

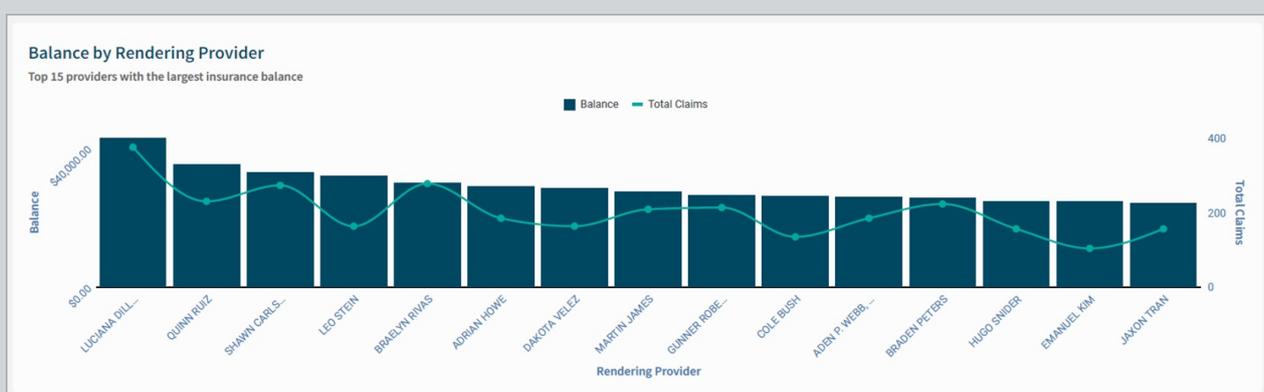• Bucket: The A/R Aging bucket that the insurance balance falls into.

Insurance Balance by Aging Bucket
Based on Date of Service

Balance by Rendering Provider

Type of report: Bar Graph

Displays: A quick look at which provider has the most outstanding Insurance A/R and their claim count.

Details:

• Balance: The dollar amount of the insurance balance.

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

• Total Claims: The number of total claims for each rendering provider.

Balance by Rendering Provider
Top 15 providers with the largest insurance balance

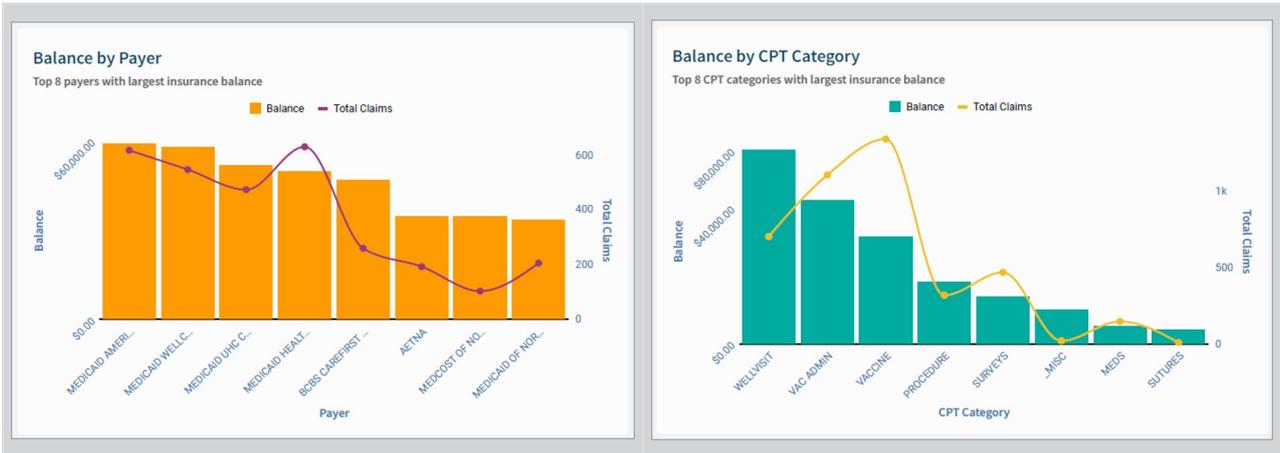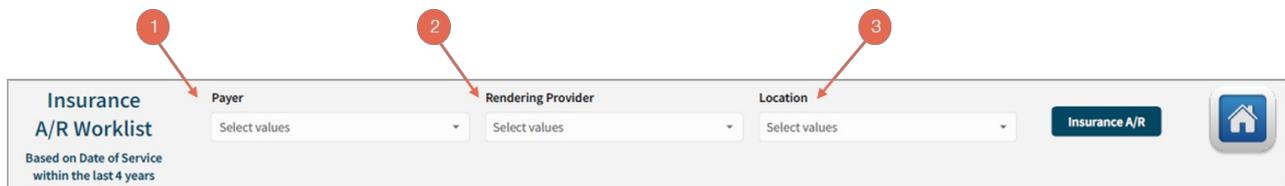| Balance by Payer	Balance by CPT Category
Type of report: Bar-graph	**Type of report**: Bar-Graph
Displays: A look at the top 10 payers with the most outstanding A/R, including data points for Total Claims for each payer.	**Displays**: A look at the outstanding Insurance A/R based on CPT Category, including data points for Total Claims for each CPT Category.

Insurance A/R Worklist Filters

Number	Section	Description
1	Payer	Use this filter to select the payer(s) you wish to search by.
2	Rendering Provider	Use this filter to select a provider(s) who performed the service with an outstanding balance.
3	Location	Use this filter to select the Location(s) of the patients with outstanding balances.

Insurance A/R Worklist

Insurance A/R Worklist: Patient Details

Type of report: Bar Graph

Displays: A worklist of all patient claims with outstanding A/R.

Details:

• Filter by Claim number, Patient number, and/or Aging Bucket.

• Summary: Shows the total patient balance based on the filters selected.

Patient Details

Claim #		Patient #		Bucket
Select values		Select values	▾	All 0 - 30 31 - 60 61 - 90 91 - 120 Over 120

Claim #	Dat.	Patient	Balance	Rendering Provider		Billing Provider		Payer		Location	Claim Note	Bucket
1001...	11/02...	3949	SAMANTHA ...	$108....		326	MARTIN JAM...	HEALTH	HEALTHCHOICE	Eastside L...	B53C9E1C30D35B3536FFCB8B19C7B3A6B023D	Over 1...
1002...	11/03...	24084	ALIJAH PAUL	$0.04		326	MARTIN JAM...	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...	20C9C5D901B6EC6CB778436E1C0835D9C1019133F445E8AA48937BE2D9977...	Over 1...
1006...	11/05...	103728	DEXTER M...	$20.00	324	BRADEN PET...	324	BRADEN PET...	MEDCOS	MEDCOST OF NORTH CAROLINA	Southside ...	D1C420CFFEB62EA1FA9C4FCCA04DED9EE97F410B86EB112AEC7757AB5271F...	Over 1...
1006...	11/05...	32553	AYLA CLAY...	$18.00		338	DAKOTA VEL...	MCDNC	MEDICAID OF NORTH CAROLINA	Northside ...	FC2349BA3280B5F66D81368D69C29B31ED3B41AA9244236185B0D54BBC52F...	Over 1...
1008...	11/05...	29165	CADEN FOL...	$33.00		330	JAXON TRAN	BCBS	BCBS CAREFIRST MARYLAND	Southside ...		Over 1...
1008...	11/06...	100362	ALLYSON ...	$5.00	330	JAXON TRAN	330	JAXON TRAN	HEALTH	HEALTHCHOICE	Eastside L...	31378E0E4366D6258B53BF5BE6D07A1038327EEC	Over 1...
1011...	11/06...	98941	COLIN LOPEZ	$105....	330	JAXON TRAN	330	JAXON TRAN	BCBS	BCBS CAREFIRST MARYLAND	Eastside L...		Over 1...
1014...	11/06...	24112	LIAM MCCO...	$61.00		322	PHOEBE BLA...	HEALTH	HEALTHCHOICE	Eastside L...	B634215F35B5911F6CA871E51ECE6C6F96D40AF276C74CF72D9B2AF8C8735...	Over 1...
1008...	11/07...	109923	HARVEY D...	$28.00		328	GUNNER ROB...	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...	2231679A1BEE99ED8DB97D49609E56A38FE3CECC91D531CC8AE5D15A41CD...	Over 1...
1011...	11/08...	98941	COLIN LOPEZ	$40.00	330	JAXON TRAN	330	JAXON TRAN	BCBS	BCBS CAREFIRST MARYLAND	Eastside L...		Over 1...
1013...	11/10...	34771	RAYMOND ...	$109....		342	FRANCIS CO...	MCDNC	MEDICAID OF NORTH CAROLINA	Northside ...		Over 1...
1014...	11/11...	112212	NICOLE H...	$25.00		327	BRAELYN RIV...	HEALTH	HEALTHCHOICE	Eastside L...	86D14C71431AC0A98A7DA47E98345F0384C339D4CC22E609D6FF40C1D172A...	Over 1...
1022...	11/12...	117161	EZEKIEL M...	-$10....	333	LUCIANA DIL...	330	JAXON TRAN	AETNA0	AETNA	Eastside L...		Over 1...
1019...	11/14...	116872	HENDRIX ...	-$0.01	320	ADEN P. WEB...	320	ADEN P. WEB...	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...		Over 1...
1025...	11/17...	34223	SAGE BENT...	$22.00		326	MARTIN JAM...	MCDNC	MEDICAID OF NORTH CAROLINA	Northside ...	94CA0E962C066969F4B1B929B29A2A8B0852794B17FC549451ADB713DCD9D...	Over 1...
1276...	11/20...	81944	MILA BYRD	$0.64	330	JAXON TRAN	330	JAXON TRAN	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...	5F263BB5FE2077953A9678D1EEF9FD74A5366953BDD28FAD3050AB27AC881...	Over 1...
1034...	11/25...	103376	FINN BENT...	-$0.01	316	CASH SUARE...	324	BRADEN PET...	HEALTH	HEALTHCHOICE	Eastside L...	CD42EFA3735140C3B4F64C09567A947400484F1C1FE112C559925223E0F042...	Over 1...
1048...	11/25...	32864	GRACELYN...	$105....	328	GUNNER ROB...	328	GUNNER ROB...	MEDCOS	MEDCOST OF NORTH CAROLINA	Eastside L...	16F331D0D21ACB7C56186B9376E	Over 1...
1053...	12/07...	115375	OLIVER LE...	$5.00	326	MARTIN JAM...	326	MARTIN JAM...	HEALTH	HEALTHCHOICE	Eastside L...	2E2B1EBEAB256F70CC96D492DE136BE3B89192C4BF73B6266B905B25E43B2...	Over 1...
1063...	12/11...	15825	HATTIE CO...	$9.76	341	EMANUEL KIM	324	BRADEN PET...	TRCEST	TRICARE EAST	Eastside L...		Over 1...
1103...	01/11...	12274	EZRA HOBBS	-$75....	336	COLE BUSH	336	COLE BUSH	BCBS	BCBS CAREFIRST MARYLAND	Eastside L...	Free Text Field ****	Over 1...
1112...	01/11...	88375	QUENTIN B...	-$1.00	335	QUINN RUIZ	327	BRAELYN RIV...	MCDNC	MEDICAID OF NORTH CAROLINA	Southside ...		Over 1...
1368...	01/12...	33305	LEO BROWN	-$100...	326	MARTIN JAM...	326	MARTIN JAM...	AETNA0	AETNA	Northside ...	324DAD31F079040DED8F94C60AC3EC99B4EEBBBED48B35228A1113C0287D3	Over 1...
1113...	01/18...	31412	RIVER SWEET	$39.01	332	LEO STEIN	332	LEO STEIN	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...	B4312EDDF4AC4A00904AE898DE9382CF9A52E969C72D0A52C59F0ED78C866...	Over 1...
1118...	01/20...	105102	DESTINY V...	$111....	332	LEO STEIN	332	LEO STEIN	MCDNC	MEDICAID OF NORTH CAROLINA	Eastside L...	D39095EA987D289767A52D27F4DC1E2374A9E61982B6E24630632F719DF1C...	Over 1...

SUMMARY	⌄	$399,125.47
3,861 rows – 11 columns		Total Balance