Aging AR Analysis Report

Last modified on 10/01/2026 11:38 am EDT

DrChrono has made significant improvements to the Aging AR Analysis Report. It will give you better clarity on the money owed to your practice by insurance payers and patients.

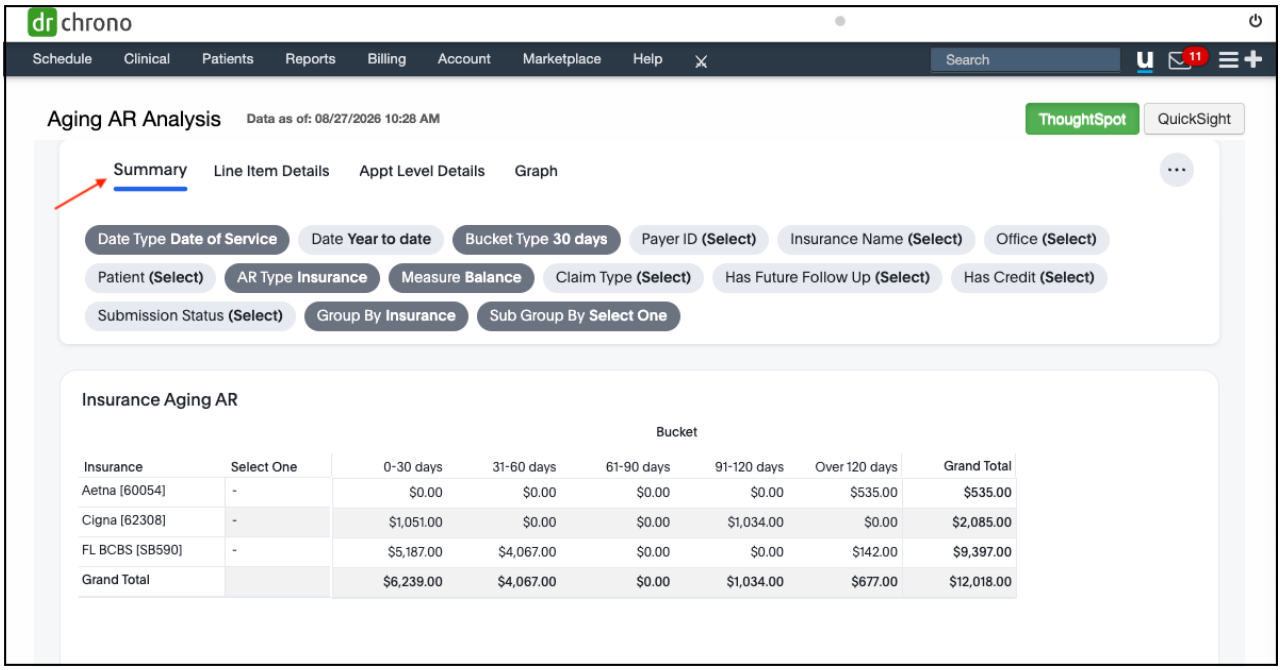
To access the report, navigate to **Billing > Aging AR Analysis**.

The tabs to switch between the Summary, Line Item Details, Appt Level Details, and a Graph are on the top left of the screen, right under the report title.

- **Summary** - This tab will show you a high-level view of your accounts receivable from insurance payers in the standard 30-day increments. It is also where you can customize the report to meet your business needs.
- **Line Item Details** - This tab will show your accounts receivable information, meeting the set parameters at the line-item level.
- **Appt Item Details** - This tab will show your accounts receivable information, meeting the set parameters at the appointment level.
- **Graph** - This tab will show you the information in bar graph form.

Summary Tab | Save the report |Sorting | Onscreen Report | Drilling into Data | Line Item Details Tab | Appt Level Details | Graph | Schedule to Run

Summary Tab



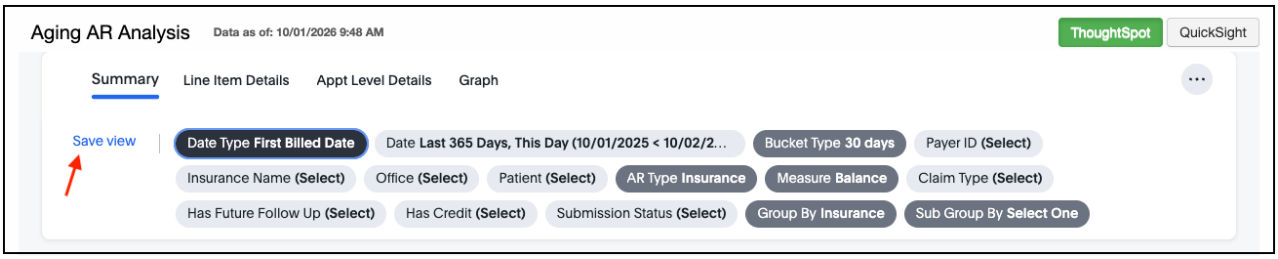
Examples of controls available include the following. Each option may not be available if it does not apply to the tab you view.

- **Date Type** - Allows you to select Date of Service, First Billed Date, Last Balance Transferred, or Last Billed Date
- **Date** - Start and Stop date for your report
- **Bucket Type** - Allows you to select 30 days, Month, or Quarter
- **Payer ID** - Allows you to select a specific payer ID or all of them
- **Insurance Name** - Allows you to select a specific payer by name
- **Office** - Allows you to view a specific office, a combination of offices, or all of them
- **Patient** - Allows you to view a specific patient
- **AR Type** - Allows you to select All, Insurance, or Patient
- **Measure** - Allows you to view the report by balance or expected balance
- **Claim Type** - Allows you to view Professional and/or Institutional claims (if your account is set to bill Institutional claims
- **Has Future Follow-up** - Allows you to select appointments with or without a future follow-up date
- **Has Credit** - Allows you to select appointments that have a credit
- **Submission Status** - Allows you to select claims that have either been submitted or not submitted

Once you have set your parameters, the report will populate automatically. The Data Freshness date and time at the top of the report will indicate how current the information is.

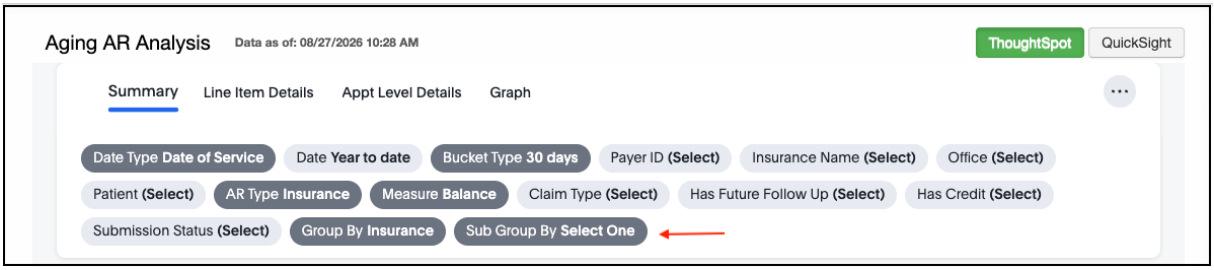
Saving the Parameters set

If the report is something you run regularly, you can save the view, give it a name, and it will be saved for quick access later to rerun. Press **Save View** on the left of the screen.



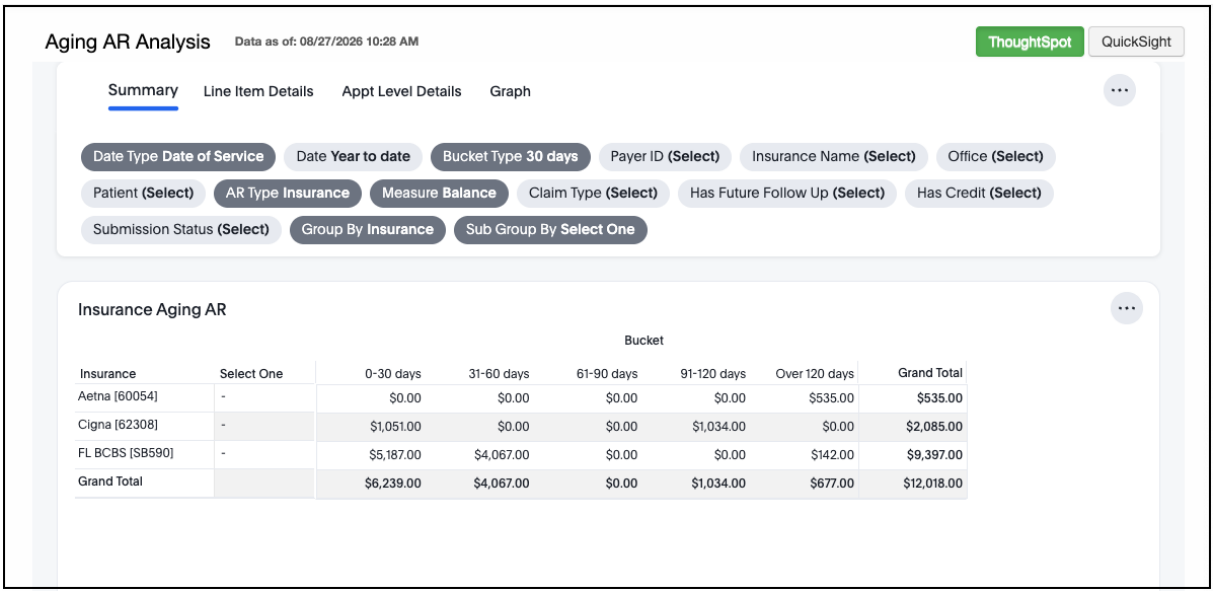
Sorting by Group and Sub-group

From the same area, you can select how to group and sub-group the information listed in your report.



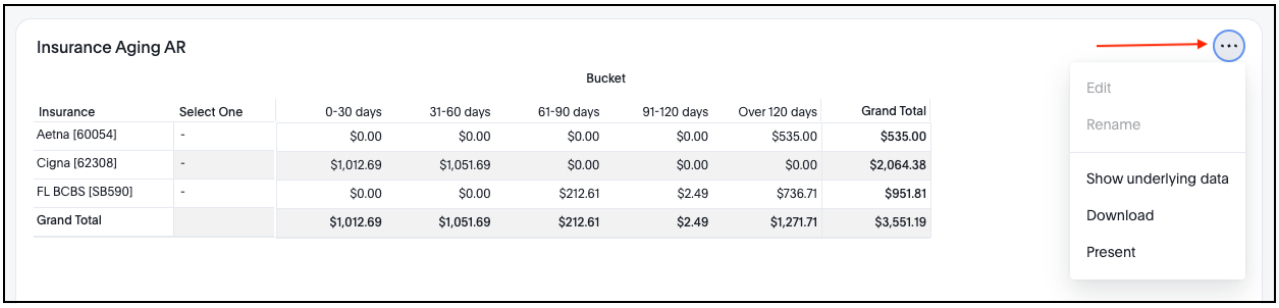
Onscreen Report

Once you select your parameters, you will see your report on-screen on the summary tab:

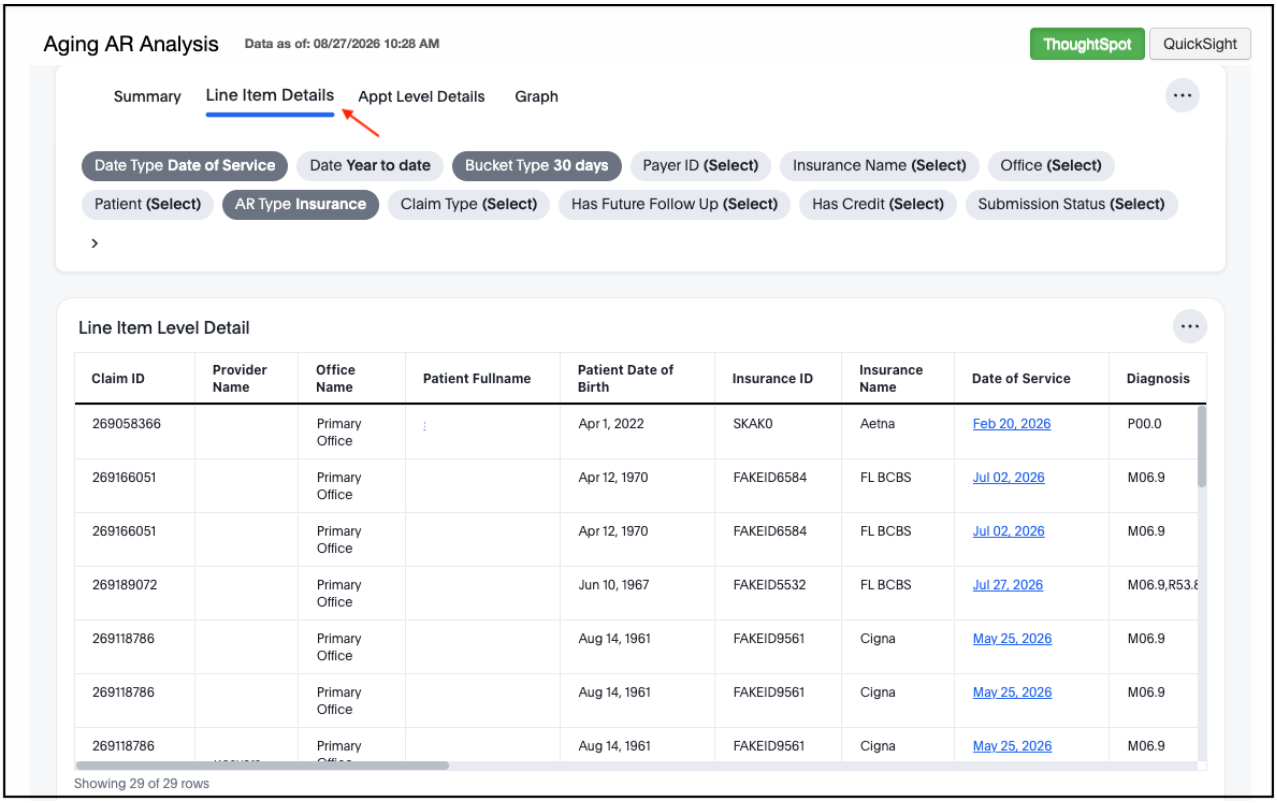


Drilling into Underlying Data, Downloading and Displaying in Presentation Mode

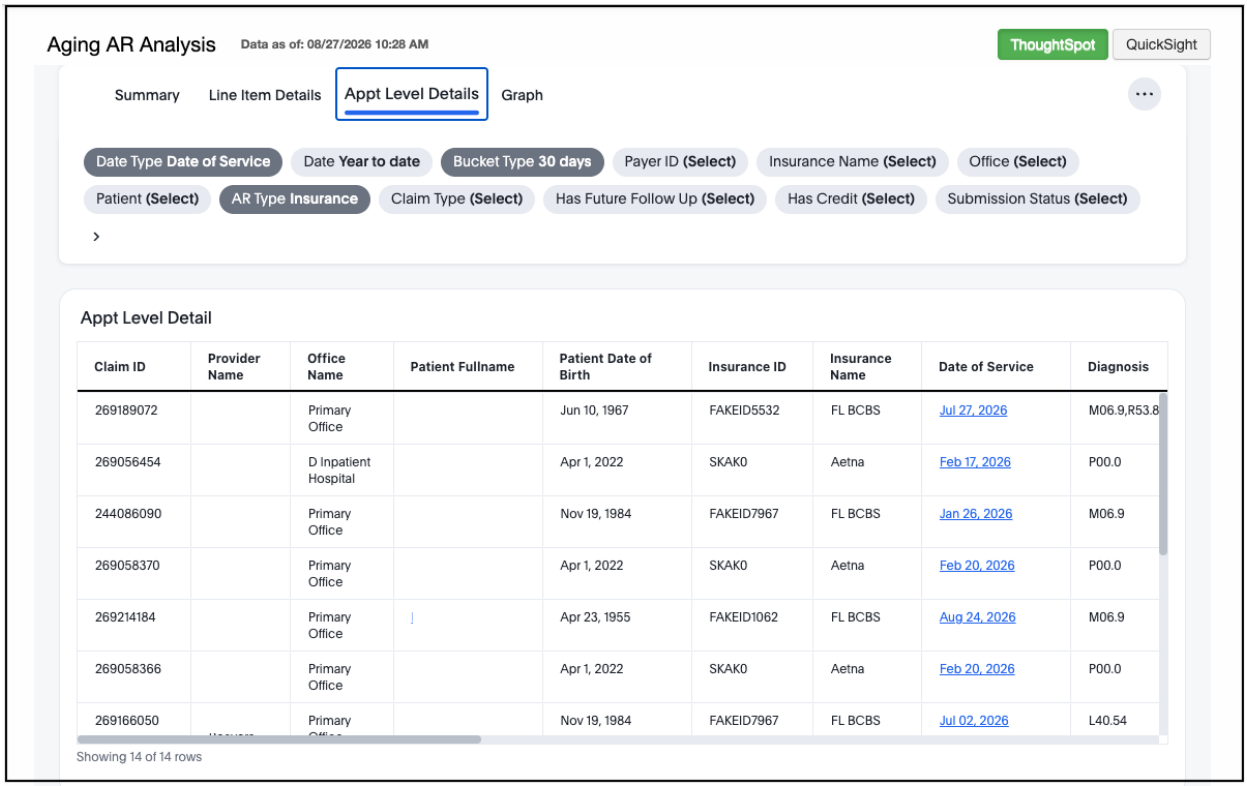
Pressing the three horizontal dots will expose options to drill into the underlying data, download the report, or display it in presentation mode.



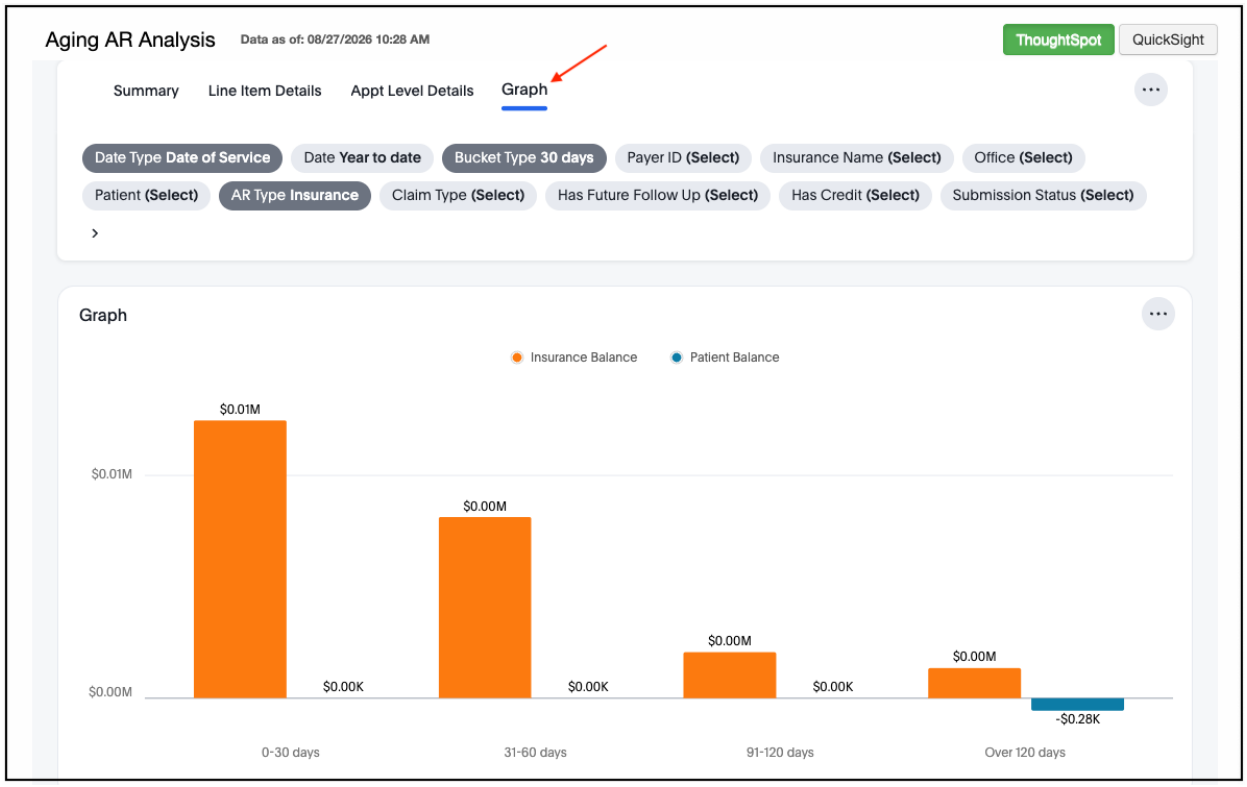
Line Item Details Tab



Appt Level Details Tab



Graph



Schedule report to run automatically

Press the three horizontal dots to expose the option to schedule the report to schedule the report to run and email it to you as an attachment. There is an option to manage the schedule as well.

