

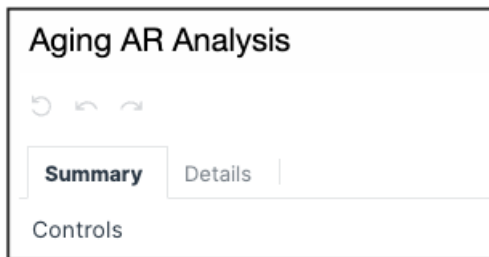
How Do I See My Accounts Receivable?

Last modified on 06/05/2025 1:08 pm EDT

Seeing your accounts receivable (insurance and patient balances) is easy in DrChrono. You can see in real time what is outstanding and the age of the receivable, at a glance.

[Sorting Groups](#) | [Sorting Columns](#) | [Onscreen Report](#) | [Exporting to CSV or Excel](#) | [Resetting and/or Refreshing Values](#) | [Demo](#)

1. Hover over the **Billing** tab and select **Aging AR Analysis**.



- **Summary** - This tab will show you a high-level view of your accounts receivable from insurance payers and patients in the standard 30-day increments. It is also where you can customize the report to meet your business needs.
- **Details** - This tab will show all your accounts receivable information that matches your set parameters.

The Summary tab will allow you to drill down further to look at just insurance receivables, patient receivables, or both.

(left side of screen)

A screenshot of the 'Controls' section on the left side of the screen. It contains three dropdown menus. The first is labeled 'Date Type' and has 'Date of Service' selected. The second is labeled 'AR Type' and has 'All' selected. The third is labeled 'Measure' and has 'Balance' selected.

(middle screen)

Date	
<input type="text"/>	- <input type="text"/>
Has Future Follow-up	Has Credit
<input type="text" value="All"/>	<input type="text" value="All"/>
Payer ID	Insurance Name
<input type="text" value="All"/>	<input type="text" value="All"/>

(right side of screen)

Bucket Type
<input type="text" value="30 days"/>
Submission Status
<input type="text" value="All"/>
Patient
<input type="text" value="All"/>

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
- **AR Type** - Allows you to select All, Insurance, or Patient
- **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
- **Measure** - Allows you to view the report by balance or expected balance
- **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

Once you have set your parameters, the report will populate automatically. The Data Freshness date/time will let you know how current the information is.

Aging AR Analysis

Summary

Details

Graph

Controls

Date Type

Date of Service

Date

01/01/2023 – 1...

Insurance Aging AR

Data Freshness

Nov 1, 2024 8:45am

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.

Group By

Insurance

Search value

Billing Status

Claim Status

Insurance

Insurance Plan Type

Office

Provider

Sub Group By

Select One

Search value

Billing Status

Claim Status

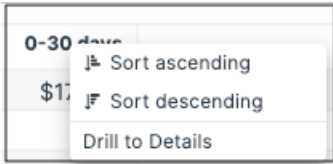
Insurance Plan Type

Office

Provider

Sorting Columns

You can press on any report header to sort in ascending or descending order or drill into additional details.



Onscreen Report

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

Aging AR Analysis

Summary

Details

Controls

Date Type

Date of Service

Date

06/10/2024

Bucket Type

30 days

AR Type

Insurance

Has Future Follow-up

All

Has Credit

All

Submission Status

All

Measure

Balance

Payer ID

All

Insurance Name

All

Office

All

Patient

All

Insurance Aging AR

Data Freshness

Jun 10, 2024 11:50am

Group By

Insurance

Sub Group By

Select One

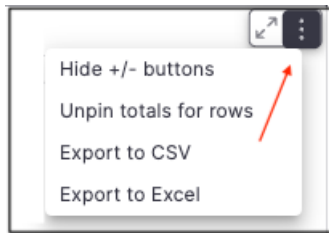
Insurance	0-30 days	Over 120 days	Total
Total	\$175.00	\$1,850.00	\$2,025.00
[GPRNT110]		\$150.00	\$150.00
Aetna Health Plans [10211]		(\$50.00)	(\$50.00)
Aetna Health Plans [10654]		\$1,000.00	\$1,000.00
CIGNA [62308]		\$150.00	\$150.00
Cigna [62308]		\$300.00	\$300.00
Cigna [E0132]	\$175.00		\$175.00
Cigna [J1747]		\$150.00	\$150.00
United Medical Resources []		\$150.00	\$150.00

Here is the summary report that appears on the bottom left of the screen that is a little easier to read.

Insurance Aging AR	Data Freshness	Group By	
	Jun 10, 2024 11:50am	Insurance	
Insurance	0-30 days	Over 120 days	Total
Total	\$175.00	\$1,850.00	\$2,025.00
[GPRNT110]		\$150.00	\$150.00
Aetna Health Plans [10211]		(\$50.00)	(\$50.00)
Aetna Health Plans [10654]		\$1,000.00	\$1,000.00
CIGNA [62308]		\$150.00	\$150.00
Cigna [62308]		\$300.00	\$300.00
Cigna [E0132]	\$175.00		\$175.00
Cigna [J1747]		\$150.00	\$150.00
United Medical Resources []		\$150.00	\$150.00

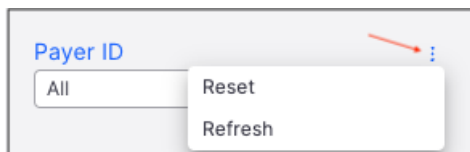
Exporting to CSV or Excel

You can also export the report to CSV or Excel by pressing the 3 vertical dots on the right of the screen. The report will be generated and available in your message center.



Resetting and/or Refreshing values

If you would like to change a control and run a different report, you can reset and/or refresh the values on each control by pressing on the three vertical dots just to the right of the control name. If you hover in the area, the three vertical dots will appear.



Demo
