# How Do I See My Accounts Receivable?

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**.
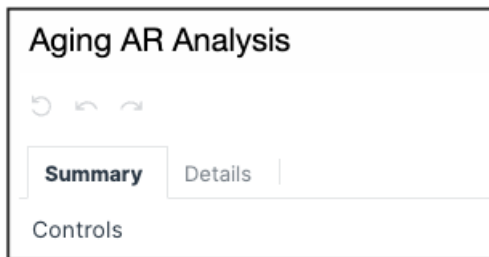


- **Summary** - This tab will show you a high-level view of your accounts receivable from insurance payers and patients in the standard 30-day increments. It is also where you can customize the report to meet your business needs.
- **Details** - This tab will show all your accounts receivable information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



(middle screen)

(right side of screen)



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.

## Sorting by Group and Sub-group

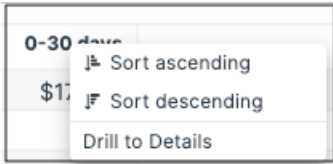From the same area, you can select how to group and sub-group the information listed in your report.





## 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:



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

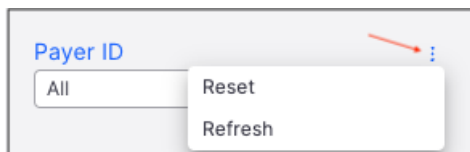| Insurance Aging AR | Data Freshness Jun 10, 2024 11:50am | Group By Insurance | |
|---|---|---|---|
| **Insurance** | **0-30 days** | **Over 120 days** | **Total** |
| **Total** | $175.00 | $1,850.00 | $2,025.00 |
| **[GPRNT110]** | | $150.00 | $150.00 |
| **Aetna Health Plans [10211]** | | ($50.00) | ($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.
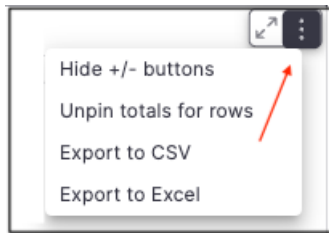


## Resetting and/or Refreshing values

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