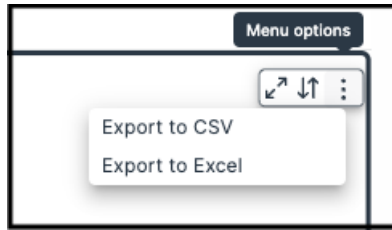


Aging AR Analysis Updates: Export Reporting

09/09/2024 9:45 am EDT

Once you have selected your parameters and the report has generated, you have the option to export it in MS Excel or CVS format.

The option to export is on the right of the screen by clicking on the 3 vertical dots. The message will export and be available in your message center.



The exported file will appear with all of the columns listed.

(Full report as exported)

| Claim ID | Provider Name | Office Name | Patient Full Name | Patient Date of Birth | Insurance ID | Insurance Name | Date of Service | Diagnosis | Billed | Allowed | Insurance Paid | Patient Paid | Adjustment | Insurance Balance | Patient Balance | Billing Status | First EDI Date | Last EDI Date | Follow Up Date | Billing Note | Claim Status |
|-----------|---------------|----------------------|-------------------|-----------------------|---------------|---------------------------------|-----------------|-----------|------------|------------|----------------|--------------|------------|-------------------|-----------------|---------------------|----------------|---------------|----------------|---|---|
| 208953978 | | D Inpatient Hospital | Sample Patient | 11-17-1989 | Y18044413 | United Medical Resources | Apr 19, 2022 | I00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | Bill Insurance | 04-19-2022 | 04-19-2022 | | | Bill Insurance |
| 208953995 | | D Inpatient Hospital | Sample Patient | 10-29-1962 | 123456789 | Aetna - Institutional claims UB | Apr 19, 2022 | A01.01 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | \$0.00 | \$1,000.00 | \$0.00 | Bill Insurance | 04-19-2022 | 04-19-2022 | | | Bill Insurance |
| 211221599 | | D Inpatient Hospital | Sample Patient | 04-01-2022 | 2134687963 | Cigna | May 9, 2022 | M54.50 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | Bill Insurance | 05-09-2022 | 05-09-2022 | | | Bill Insurance |
| 218651632 | | Primary Office | Sample Patient | 04-01-2022 | 2134687963 | Cigna | Jul 20, 2022 | M00.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | Bill Insurance | 07-20-2022 | 07-20-2022 | | | Bill Insurance |
| 263278632 | | Primary Office | Sample Patient | 08-07-2023 | 2134687964 | GEICO | Aug 7, 2023 | P00.0 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | Auto-Accident Claim | 08-07-2023 | 08-07-2023 | 09-11-2023 | Follow-up Date was updated to 09/11/2023 (08/07/2023) | Missing Information: Clinical note by Missing Information: Incomplete Not Submitted |
| 263278632 | | Primary Office | Sample Patient | 10-02-1967 | Claim#6627812 | CIGNA | Aug 7, 2023 | L01.03 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | Bill Insurance | 08-07-2023 | 08-07-2023 | | | Missing Information: Incomplete Not Submitted |
| 207248863 | | D Inpatient Hospital | Sample Patient | 03-01-2022 | 1234567890 | Georgia Medicare Part A | Apr 1, 2022 | V00.01XA | \$100.00 | \$100.00 | \$50.00 | \$25.00 | \$0.00 | (\$50.00) | \$50.00 | | 04-01-2022 | 04-01-2022 | | | Not Submitted |
| 218473915 | | Primary Office | Sample Patient | 04-01-2022 | 2134687963 | Geico | Jul 19, 2022 | M54.51 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 | | 07-19-2022 | 07-19-2022 | | | Not Submitted |
| 308684403 | | D Inpatient Hospital | Sample Patient | 04-01-2022 | 2134687963 | MEMIC Casualty Company | Jun 3, 2024 | I01.0 | \$175.00 | \$175.00 | \$0.00 | \$0.00 | \$0.00 | \$175.00 | \$0.00 | Worker's Comp Claim | 06-03-2024 | 06-03-2024 | | | Worker's Comp Claim |

Here is a view of the report above, in three sections (left, middle, right) to allow for easier viewing.

(Left side of the report)

| Appt Level Detail | | | | | | |
|-------------------|---------------|----------------------|-------------------|-----------------------|---------------|---------------------------------|
| Claim ID | Provider Name | Office Name | Patient Full Name | Patient Date of Birth | Insurance ID | Insurance Name |
| 208953978 | | D Inpatient Hospital | Sample Patient | 11-17-1989 | Y18044413 | United Medical Resources |
| 208953995 | | D Inpatient Hospital | Sample Patient | 10-29-1962 | 123456789 | Aetna - Institutional claims UB |
| 211221599 | | D Inpatient Hospital | Sample Patient | 04-01-2022 | 2134687963 | Cigna |
| 218651632 | | Primary Office | Sample Patient | 04-01-2022 | 2134687963 | Cigna |
| 263278632 | | Primary Office | Sample Patient | 08-07-2023 | 2134687964 | GEICO |
| 263276832 | | Primary Office | Sample Patient | 10-02-1967 | Claim#6627812 | CIGNA |
| 207248863 | | D Inpatient Hospital | Sample Patient | 03-01-2022 | 1234567890 | Georgia Medicare Part A |
| 218473915 | | Primary Office | Sample Patient | 04-01-2022 | 2134687963 | Geico |
| 308684403 | | D Inpatient Hospital | Sample Patient | 04-01-2022 | 2134687963 | MEMIC Casualty Company |

(Middle of the report)

| Date of Service | Diagnosis | Billed | Allowed | Insurance Paid | Patient Paid | Adjustment | Insurance Balance | Patient Balance |
|-----------------|-----------|------------|------------|----------------|--------------|------------|-------------------|-----------------|
| Apr 19, 2022 | I00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Apr 19, 2022 | A01.01 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | \$0.00 | \$1,000.00 | \$0.00 |
| May 9, 2022 | M54.50 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Jul 20, 2022 | M00.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Aug 7, 2023 | P00.0 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Aug 7, 2023 | L01.03 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Apr 1, 2022 | V00.01XA | \$100.00 | \$100.00 | \$50.00 | \$25.00 | \$0.00 | (\$50.00) | \$50.00 |
| Jul 19, 2022 | M54.51 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$0.00 |
| Jun 3, 2024 | I01.0 | \$175.00 | \$175.00 | \$0.00 | \$0.00 | \$0.00 | \$175.00 | \$0.00 |

(Right side of the report)

| Billing Status | First EDI Date | Last EDI Date | Follow Up Date | Billing Note | Claim Status |
|---------------------|----------------|---------------|----------------|---|--|
| Bill Insurance | 04-19-2022 | 04-19-2022 | | | Bill Insurance |
| Bill Insurance | 04-19-2022 | 04-19-2022 | | | Bill Insurance |
| Bill Insurance | 05-09-2022 | 05-09-2022 | | | Bill Insurance |
| Bill Insurance | 07-20-2022 | 07-20-2022 | | | Bill Insurance |
| Auto Accident Claim | 08-07-2023 | 08-07-2023 | 09-11-2023 | Follow-up Date was updated to 09/11/2023 [08/07/2023] | Missing Information: Clinical note for |
| Bill Insurance | 08-07-2023 | 08-07-2023 | | | Missing Information: Incomplete |
| | 04-01-2022 | 04-01-2022 | | | Not Submitted |
| | 07-19-2022 | 07-19-2022 | | | Not Submitted |
| Worker's Comp Claim | 06-03-2024 | 06-03-2024 | | | Worker's Comp Claim |

You have the option of sorting the columns individually within the report by clicking on the column header:



Or, sorting in MS Excel after you have exported the report.