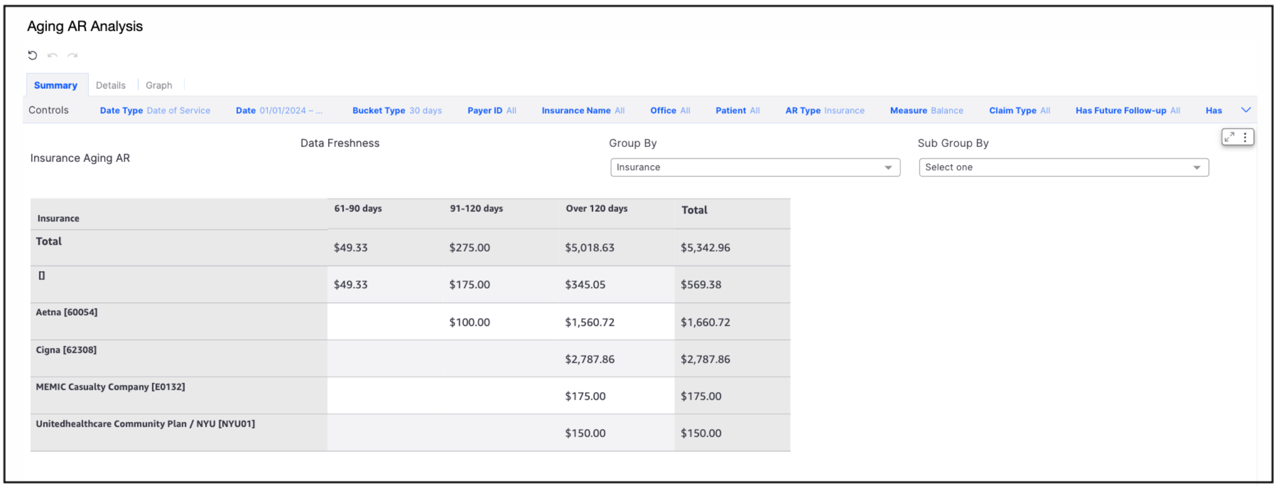
Aging AR Analysis Report: Tab and Video Walkthrough

Last modified on 10/02/2025 1:06 pm EDT

Summary | Details | Graph | Export | Video Walkthrough

Summary tab

The Summary tab shows high-level details of monies owed from both patients and insurance payers in the standard 30-day increments. It is also where you can customize the report to meet your business needs.



Insurance	61-90 days	91-120 days	Over 120 days	Total
Total	$49.33	$275.00	$5,018.63	$5,342.96
[]	$49.33	$175.00	$345.05	$569.38
Aetna [60054]		$100.00	$1,560.72	$1,660.72
Cigna [62308]			$2,787.86	$2,787.86
MEMIC Casualty Company [E0132]			$175.00	$175.00
Unitedhealthcare Community Plan / NYU [NYU01]			$150.00	$150.00

1. To access the report, navigate to **Billing > Aging AR Analysis**.
2. Ensure you are on the Summary tab.
3. Press the down arrow on the right side of the title bar. This will open the available options to customize your report. Options include:
    a. **Date Type** - Allows you to select Date of Service, First Billed Date, Last Balance Transferred, or Last Billed Date
    b. **Date** - Start and Stop date for your report
    c. **Bucket Type** - Allows you to select 30 days, a Month, or a Quarter
    d. **AR Type** - Allows you to select All, Insurance, or Patient
    e. **Has Future Follow-up** - Allows you to select appointments with or without a future follow-up date
    f. **Has Credit** - Allows you to select appointments that have a credit

g. **Submission Status** - Allows you to select claims that have either been submitted or not submitted

h. **Measure** - Allows you to view the report by balance or expected balance

i. **Payer ID** - Allows you to select a specific payer ID or all of them

j. **Insurance Name** - Allows you to select a specific payer by name

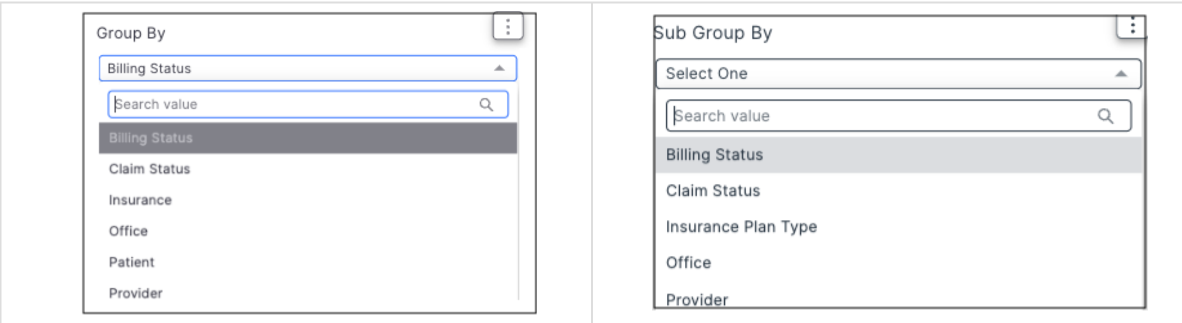
k. **Office** - Allows you to view a specific office, a combination of offices, or all of them

l. **Patient** - Allows you to view a specific patient

4. Once you have set your parameters, the report will populate automatically. The Data Freshness date and time will indicate 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.

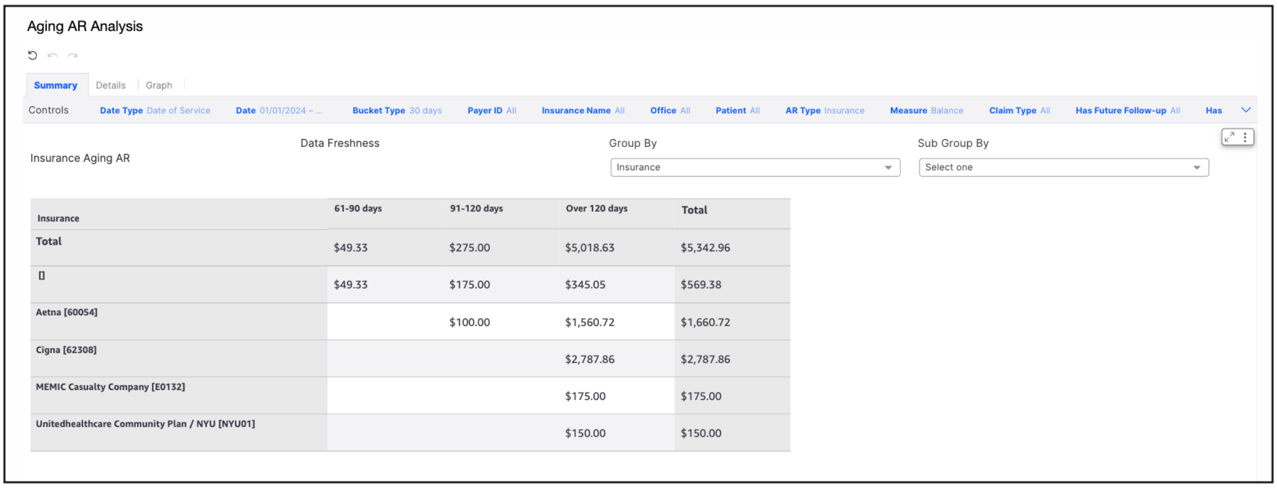


Sorting Columns

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

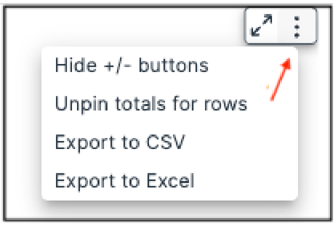
Onscreen Report

Once you select your parameters, the report is displayed under the summary tab:



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 on your device.

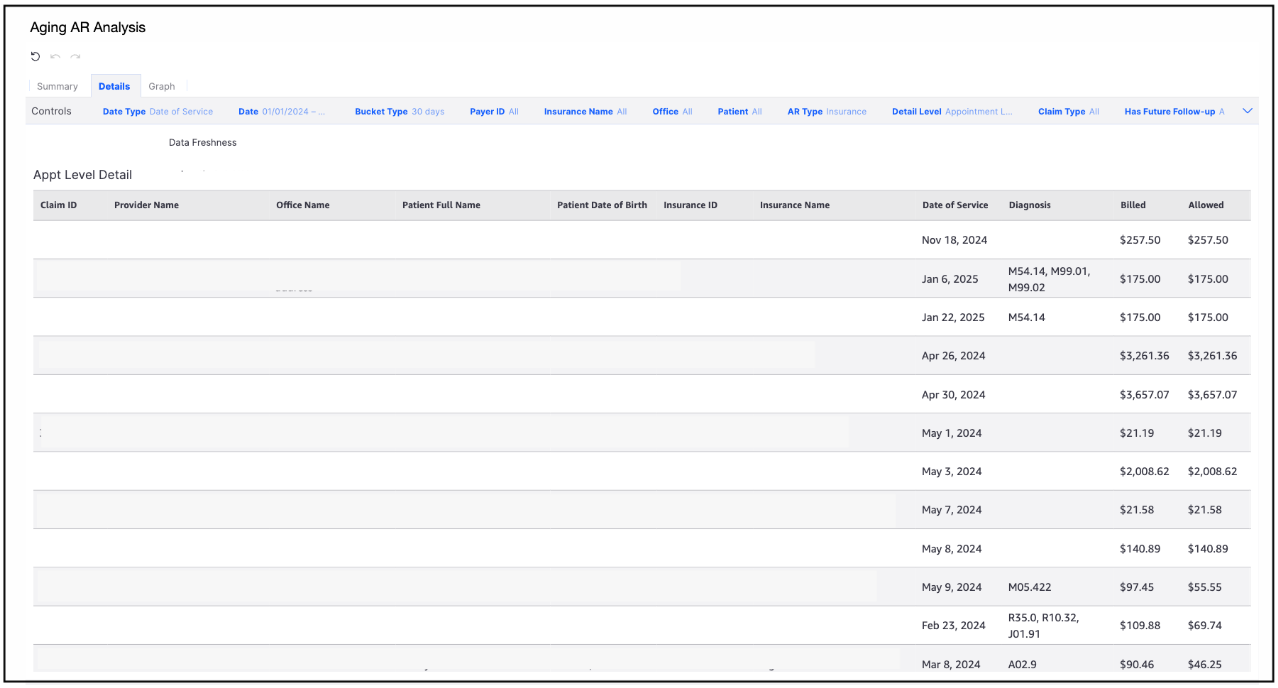


Resetting and/or Refreshing values

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.

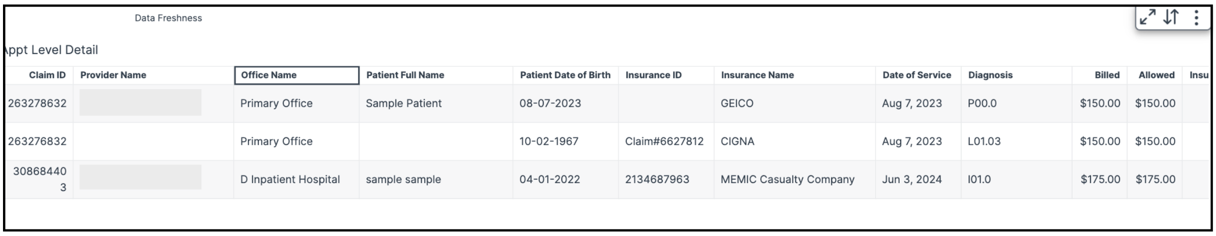
Details Tab

The detailed results shown on the Details tab are based on the parameters set in the summary tab.



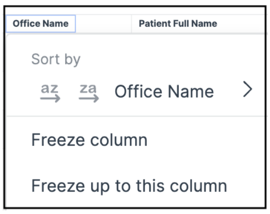
1. To access the Aging AR Analysis report, navigate to **Billing > Aging AR Analysis**.
2. The report allows you to select a value and navigate directly to the Live Claims Feed or the patient's Demographics section to take action or review information, then return seamlessly to your report.
3. To hide the Control rows, press either on the gray row itself or on the up arrow located on the right side of the screen.

The report contains multiple columns; scroll to the right to view them.



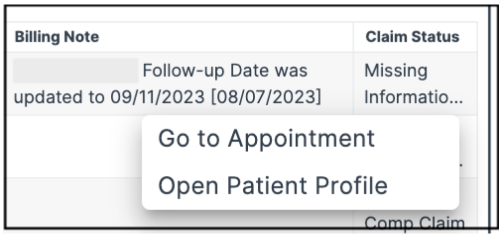
All patient data listed in this article is sample data. This is not a real person or real patient data.

Each of the columns has additional sort/freeze options. To see them, press on the column header name. For example, if you press on Office Name, you will see the following options:

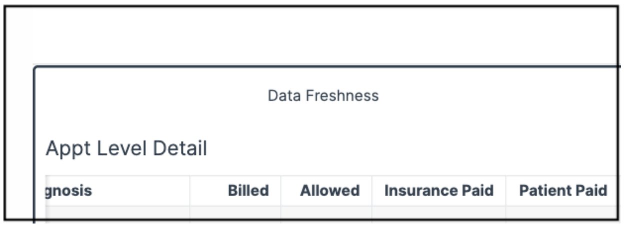


At the top of the report, you will see these options on the right. They will allow you to maximize your screen, sort the report on screen, and export the report in either CSV or Excel format. The exported report can be retrieved from your device.

Pressing within the report in any cell will give you the option to go to the appointment in the Live Claims Feed or take you to the Patient Profile. Each will open in a separate tab, without disturbing your report. Once you take the action you need from the Live Claims Feed or the Patient Profile, you can return to your report.

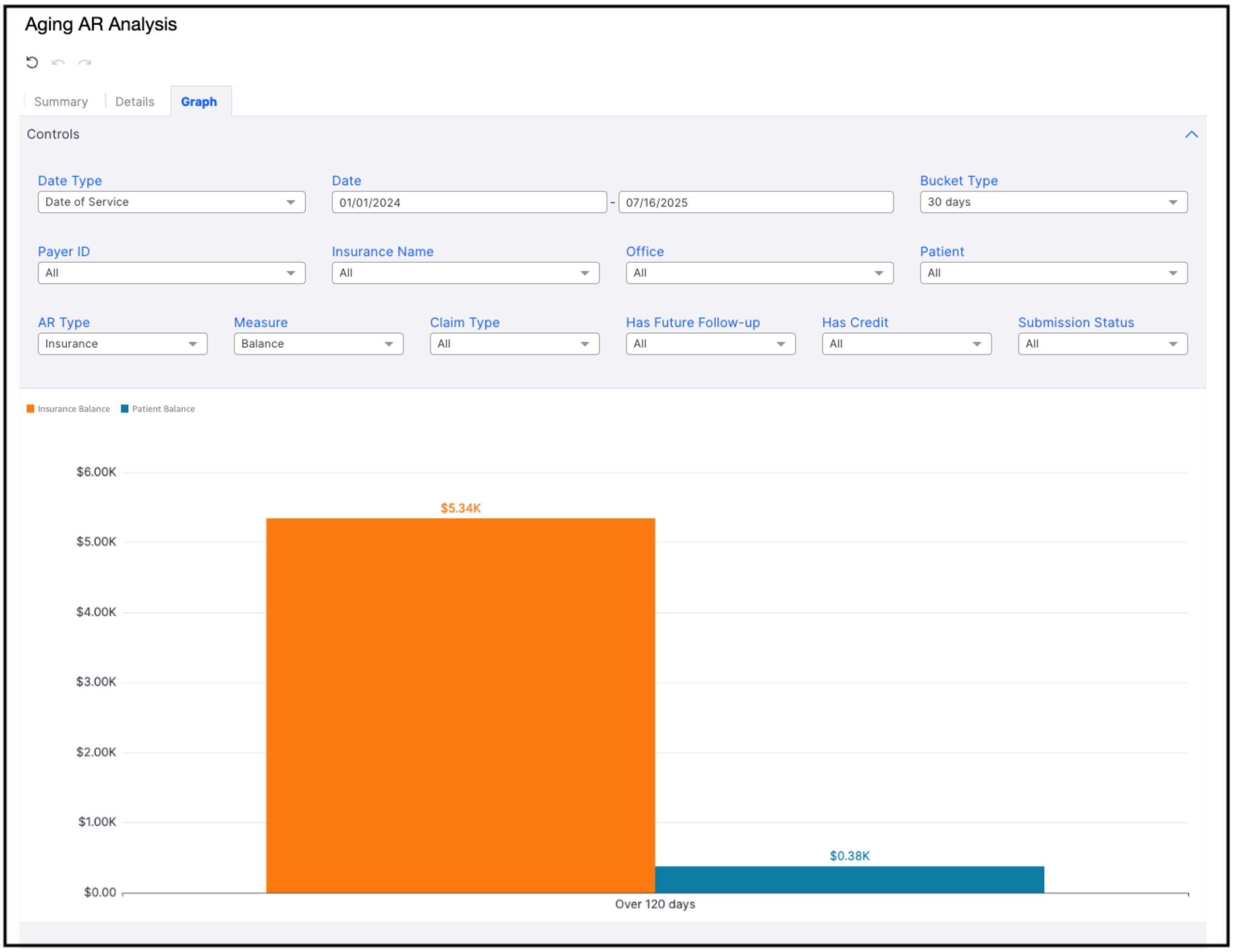


You will also be able to see the freshness of the data in the top left corner of your report.

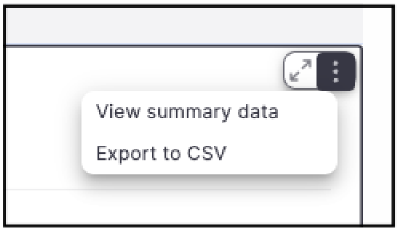


Graph Tab

The Graph tab displays the information specified on the summary tab in graph form. The graph will show the Total Insurance Balance and the total Patient Balance.

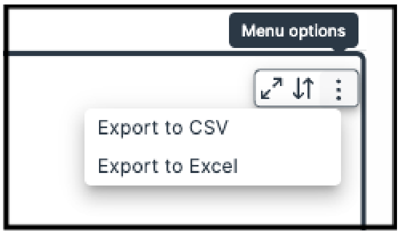


Hovering over the top-right corner will allow you to view the summary data or export it to CSV. The report will then be available on your device.



Exporting the report

After selecting your parameters and generating the report, you can export it in MS Excel or CSV format. Press the three vertical dots on the right side of the screen to export—the file will then be available on your device.



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

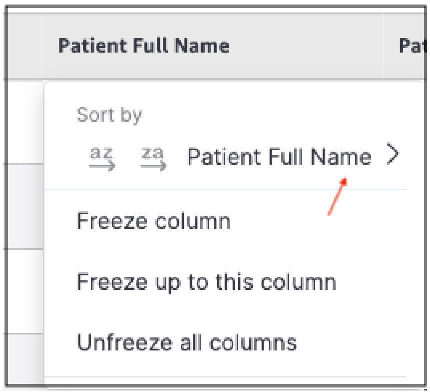
(Full report as exported)

Appt Level Detail

Claim ID	Provider Name	Office Name	Patient Full Name	Patient Date of Birth	Insurance ID	Insurance Name	Date of Service	Diagnosis
208953978		D Inpatient Hospital	Sample Patient	11-17-1989	Y18044413	United Medical Resources	Apr 19, 2022	I00
208953995		D Inpatient Hospital	Sample Patient	10-29-1962	123456789	Aetna - Institutional claims UB	Apr 19, 2022	A01.01
211221599		D Inpatient Hospital	Sample Patient	04-01-2022	2134687963	Cigna	May 9, 2022	M54.50
218651632		Primary Office	Sample Patient	04-01-2022	2134687963	Cigna	Jul 20, 2022	M00.00
263278632		Primary Office	Sample Patient	08-07-2023	2134687964	GEICO	Aug 7, 2023	P00.0
263276832		Primary Office	Sample Patient	10-02-1967	Claim#6627812	CIGNA	Aug 7, 2023	L01.03
207248863		D Inpatient Hospital	Sample Patient	03-01-2022	1234567890	Georgia Medicare Part A	Apr 1, 2022	V00.01XA
218473915		Primary Office	Sample Patient	04-01-2022	2134687963	Geico	Jul 19, 2022	M54.51
308684403		D Inpatient Hospital	Sample Patient	04-01-2022	2134687963	MEMIC Casualty Company	Jun 3, 2024	I01.0

Claim ID	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	$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	$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	$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	$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	$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 for
263276832	$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
207248863	$100.00	$100.00	$50.00	$25.00	$0.00	($50.00)	$50.00		04-01-2022	04-01-2022			Not Submitted
218473915	$150.00	$150.00	$0.00	$0.00	$0.00	$150.00	$0.00		07-19-2022	07-19-2022			Not Submitted
308684403	$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

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



Video Walkthrough