Aging AR Analysis Report: Summary tab

Last modified on 07/16/2025 11:05 am EDT

The Summary tab of the Aging AR Analysis Report will show you 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.

Aging AR Analysis											
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Summary Details Graph											
Controls Date Type Date of Service Date 01/01/2024 -	Bucket Type 30 d	lays Payer ID All	Insurance Name All Off	ice All Patient All	AR Type Insurance	Measure B	alance	Claim Type All	Has Future Follow-u	up All Ha	is ~
Dat	ta Freshness		Group By			Sub	Group B	y			¥ :
Insurance Aging AR			Insurance			▼ Se	lect one			*	
Insurance	61-90 days	91-120 days	Over 120 days	Total							
Total	\$49.33	\$275.00	\$5,018.63	\$5,342.96							
0	\$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, Month, or 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
- I. Patient Allows you to view a specific patient
- 4. 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.

Group By	:
Billing Status	
Search value	Q
Billing Status	
Claim Status	
Insurance	
Office	
Patient	
Provider	

Sub Group By	[:
Select One	*
Search value	٩
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										
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Summary Details Graph										
Controls Date Type Date of Service Date 01/01/2024	Bucket Type 30 day	/s Payer ID All Ir	isurance Nam	e All Offic	e All Patient All A	AR Type Insurance	Measure Balance	Claim Type All	Has Future Follow-up All	Has 🗸 🗸
Data	Freshness			Group By			Sub Gro	ір Ву		u ^π :
Insurance Aging AR				Insurance			▼ Select o	ne		-
	61-90 days	91-120 days	Over 120	davs	Total					
Insurance		,-		,-	Totat					
Total	\$49.33	\$275.00	\$5,018.6	53	\$5,342.96					
۵	\$49.33	\$175.00	\$345.05		\$569.38					
Aetna [60054]		\$100.00	\$1,560.7	72	\$1,660.72					
Cigna [62308]			\$2,787.8	36	\$2,787.86					
MEMIC Casualty Company [E0132]			\$175.00		\$175.00					
Unitedhealthcare Community Plan / NYU [NYU01]			\$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 on your device.

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Hide +/- buttons 🗡
Unpin totals for rows 🏏
Export to CSV
Export to Excel

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.