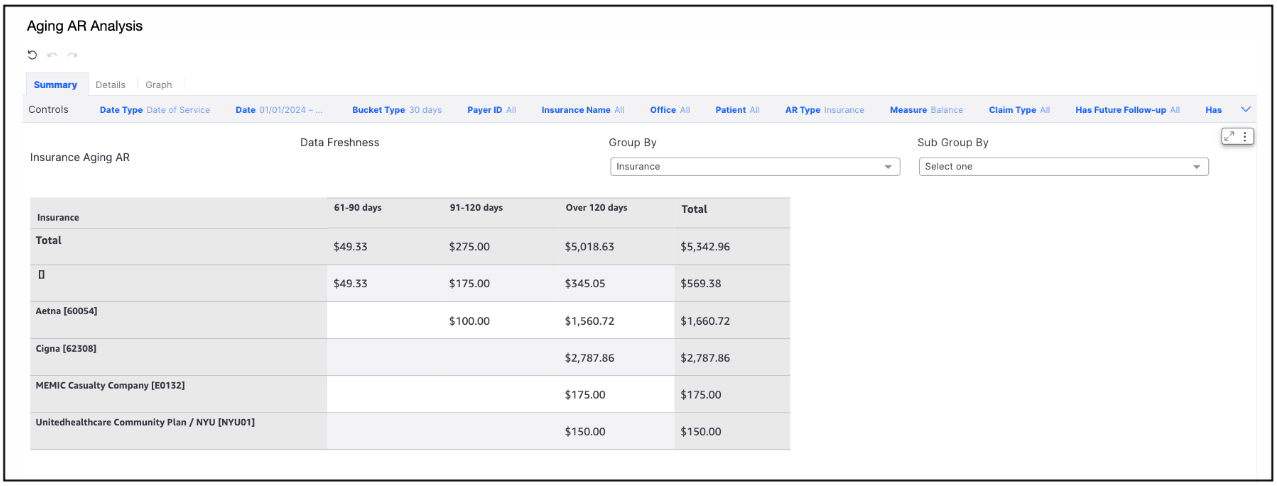
Aging AR Analysis Report: Summary tab

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.



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

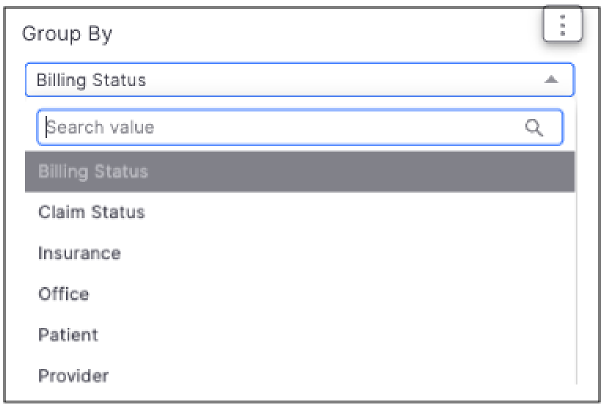
k. **Office** - Allows you to view a specific office, a combination of offices, or all of them

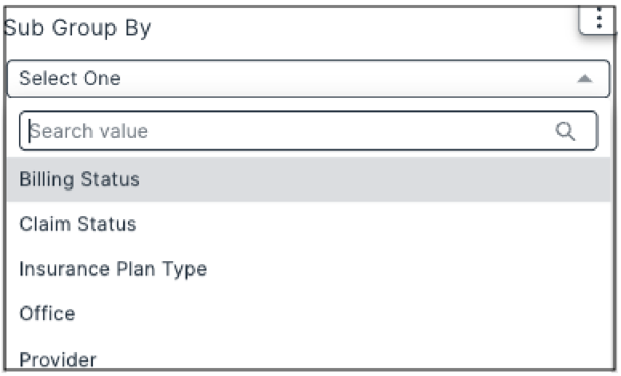
l. **Patient** - Allows you to view a specific patient

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



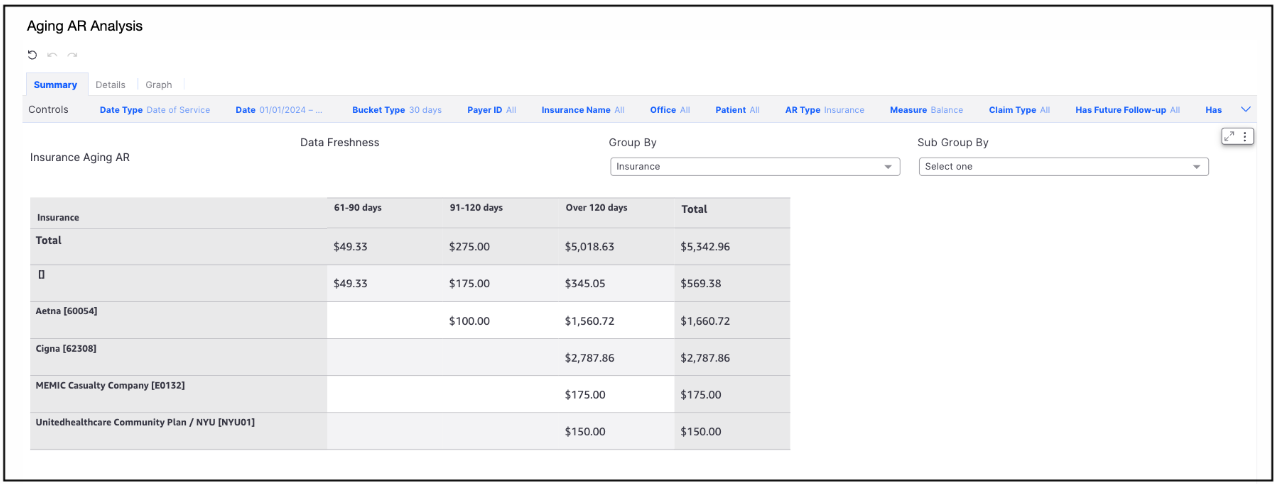


Sorting Columns

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

Onscreen Report

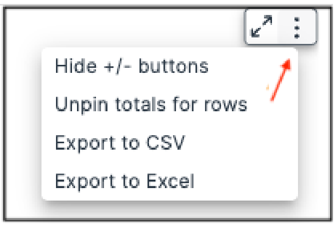
Once you select your parameters, you will see your report onscreen on the summary tab:



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

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.