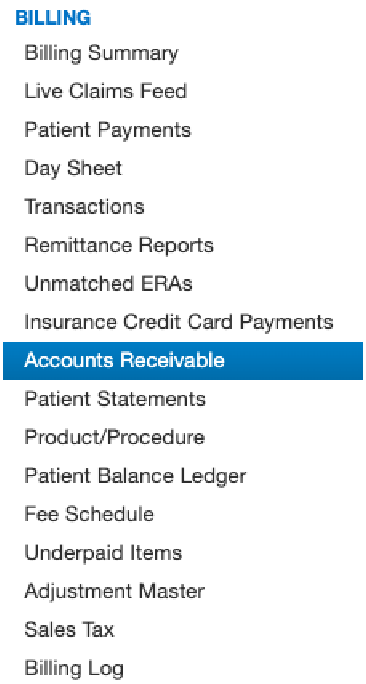
How Do I See My Accounts Receivable?

07/24/2024 3:20 pm EDT

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.

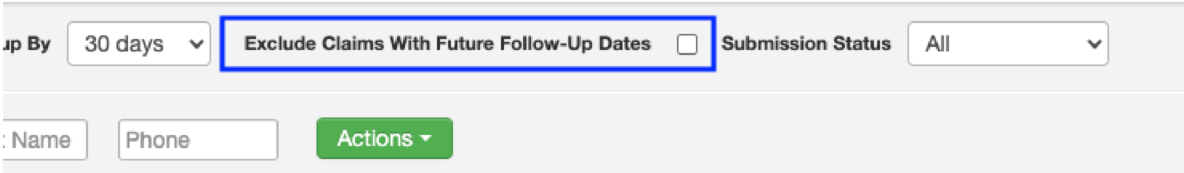
1. Hover over the **Billing** tab and select **Accounts Receivable**.

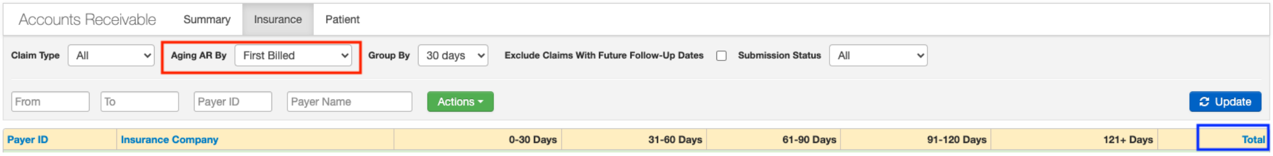


2. Click on the Insurance tab to see all claims pending with insurance. On this screen, you have several options to view the data:

- **Claim Type** - this will allow you to look at just professional or just institutional claims (or all) if your account is set up for institutional billing.
- **Aging AR By** - this will list the amounts due by Service (date of service), First Billed (the first time the claim was sent to the payer), or Last Billed (the last time the claim was sent to the payer).
- **Group By**- you can view the data in 30-day segments, by month, or by quarter.
- **Submission Status** - you can view all claims, just submitted claims, or not submitted claims.
- **From/To** - you can set a date range if you'd like. If you leave it blank, it will show all claims within your account.
- **Payer ID** - you can select a single-payer ID to view
- **Payer Name** - you can select a single-payer by name to view

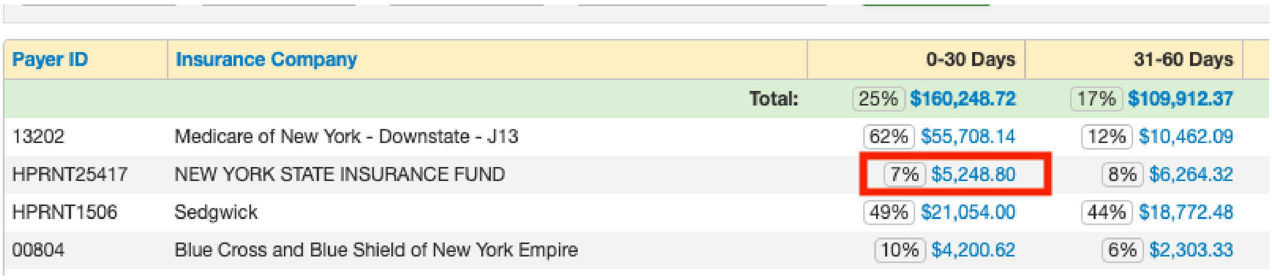
You also have the option to exclude claims with future follow-up dates from either the insurance or patient tabs. Just select the box next to "Exclude Claims with Future Follow-Up Dates from the top menu and they will not appear. Unchecking the box will make them visible again.



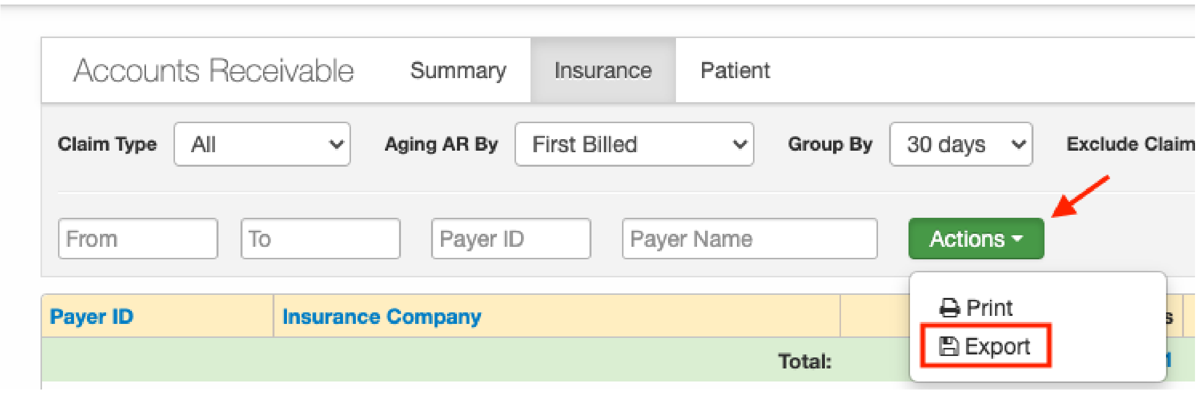


Pro Tip - if you click on the blue word **Total** on the right, the items will resort and list the top owed on top. As a default, the lines are sorted in alphabetical order by the Insurance Company. You can resort by Payer ID or Total just by clicking on those blue words (Payer ID, Insurance Company, or Total).

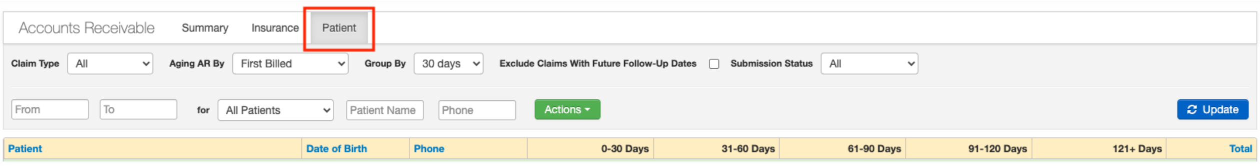
3. You can review your outstanding AR by payer and aging. To get detailed information on what claims are included in each sum, you can click on the blue dollar amount. The system will show exactly which appointments make up that total. From there, you can drill down even further into specific patient appointments.



4. You can export any of the columns/lists to MS Excel if you would like. Click on **Action** and choose **Export**. The report will be generated and will be available in your message center.



5. To view outstanding balances, click on the **Patient** tab.



The functionality works the same as the insurance tab. You can resort the listing by clicking on any of the blue words (**Patient, Date of Birth, Phone, Total**). Additionally, you can click on any of the dollar amounts listed, and the system will show all the appointments that make up that total.

You can also export the information into MS Excel by clicking on Action and Export. The report will be generated and available in your message center.