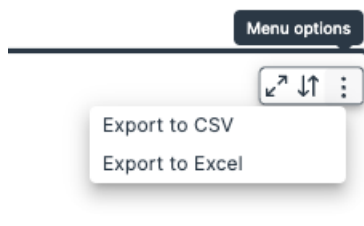


Aging AR Analysis Updates: Export Reporting

07/24/2024 12:19 pm 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 US	Apr 19, 2022	AD1.01	\$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	MS4.50	\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$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
263276832	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			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	MS4.51	\$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.