

Aging AR Analysis

07/24/2024 12:19 pm EDT

DrChrono has made some exciting enhancements to the Aging AR Analysis report to help you manage your accounts receivable.

- To navigate to the report, hover over Billing and select Aging AR Analysis

The screenshot shows the 'Aging AR Analysis 2.0' interface with the 'Summary' tab selected. It features a top navigation bar with 'Summary' and 'Chart' tabs, and an 'Export' button. The main area contains several filter sections: a date range section with '05/02/2023' and '06/01/2023' dates; a 'Group By Period' dropdown set to '30 days'; a 'Filter Date By' dropdown set to 'First Billed'; an 'AR Type' dropdown set to 'All'; a 'Group by' dropdown set to 'Choose Sort'; a 'Sub-group by' dropdown set to 'Choose Sort'; a 'Submission Status' dropdown set to 'All'; a 'Location' dropdown set to 'All Offices'; and a 'Payer' section with 'Payer ID' and 'Payer Name' input fields. A 'Credits' dropdown is set to 'Include'. An 'Update' button is located at the bottom right.

Let's take a look at the new options, starting with the left side of the screen, under the **Summary** tab.

This annotated screenshot highlights the left side of the interface. A dark blue box surrounds the date range inputs (05/02/2023 and 06/01/2023). An orange arrow points to the 'Group By Period' dropdown (30 days). A green arrow points to the 'Filter Date By' dropdown (First Billed). A purple arrow points to the 'AR Type' dropdown (All). A light blue arrow points to the 'Credits' dropdown (Include).

- **Date range** - the boxes within the dark blue box will allow you to select a start and end date for the information.
- **Group By Period** - will allow you to group the information in different ways; 30 days, month, or quarter. (orange arrow)
- **Filter Date By** - will allow you to filter the information by First Billed Date, Last Billed Date, or Service Date. (green arrow)
- **AR Type** - will allow you to view AR by patient, insurance, or all. (purple arrow)
- **Credits** - will allow you to include, exclude, or show any credit balances. (light blue arrow)

Let's take a look at the options on the right side of the screen, under the Summary tab.

This annotated screenshot highlights the right side of the interface. A light blue arrow points to the 'Group by' dropdown (Choose Sort). An orange arrow points to the 'Sub-group by' dropdown (Choose Sort). A green arrow points to the 'Submission Status' dropdown (All). A red arrow points to the 'Location' dropdown (All Offices). A grey box surrounds the 'Payer' section, which includes 'Payer ID' and 'Payer Name' input fields. An 'Update' button is located at the bottom right.

- **Group by** - will allow you to view the information grouped by provider, office, billing/claim status, insurance, or insurance plan type. (light blue arrow)
- **Sub-group by** - will allow you to further refine the information by provider, office, billing/claim status, insurance, or insurance plan type. (orange arrow)
- **Submission Status** - will allow you to view submitted claims, non-submitted claims, or both. (green arrow)
- **Location** - will allow you to view information for a specific office, or all offices within your account. (red arrow)

arrow)

- **Payer** - will allow you to view the information by payer id or payer name (gray box)

Let's take a look under the Chart tab.

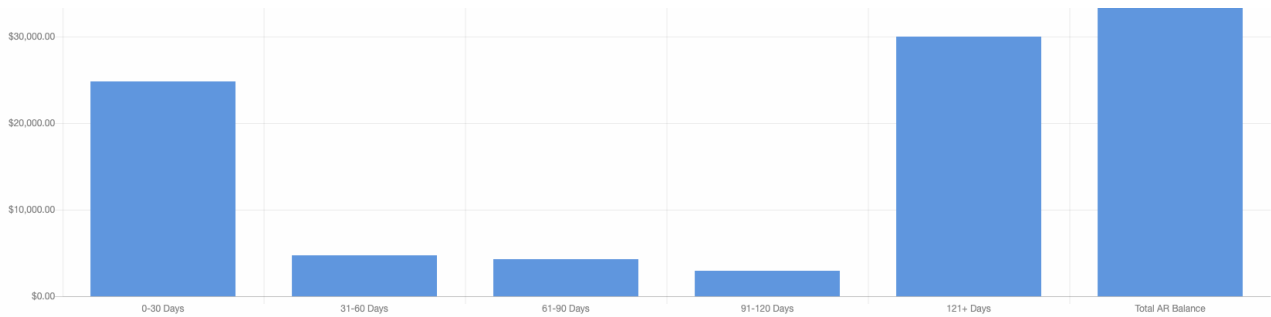
Aging AR Analysis Summary **Chart**

05/02/2023 06/01/2023

Group By Period 30 days ▼

Filter Date By First Billed ▼

This screen will show you the information in a bar chart, separated by 0-30 days, 31-60 days, 61-90 days, 91-120 days, 121+ days, and total AR balance.



There is also a chart on the bottom left of the screen that will give you Gross and Net AR Days.

AR Days

Gross:
Net: