

Patient Aging Report

I would highly recommend that you run the report for Patient Aging on a WEEKLY basis in order to stay on top of your account balances as this is an important part of your Practice Management.

The admin team runs a report weekly for Insurance Aging so we can help stay on top of slow or non paying claims. You are welcome to run the Ins Aging report also, but the Patient Aging is your top priority.

- Click on Reports - System Reports - Billing - Patient Aging - under 31-day bucket (that is the most accurate).
- Please do not just charge the balance shown on this aging report without confirming it in the View/Edit Charges tab.
- For each client that shows a balance, go to the View/Edit Charges tab to see if there is a Prepayment (Prepay) Credit that has not been applied yet.
- Be sure to adjust the date range in View/Edit Charges so that all DOS are shown.
- We apply credits each business day, so if you see a balance and a there is a prepay credit, you do not need to collect on that balance. If the prepay credit does not cover the balance then you would collect just the difference.

It is also important that you pay close attention to and read the Patient Notifications that pop up as these have valuable information to assist you. We update these VERY frequently as new information becomes available. If you see that a notification does not appear to be accurate, please alert me rather than just ignore it.

And, if questions about a balance or with understanding the Patient Aging Report, please let me know and I am happy to help!

valant Rum River Counseling Inc. Jennifer Holdredge, Dr. / MA PsyD

System Reports Appointment Clinical Billing CSV

Patient: ALL PATIENTS Patient Type: ALL PATIENT TYPES Assigned Facility: ALL FACILITIES Service Facility: ALL FACILITIES Patient ID: NULL

in Aging Bucket: Under 31 days Group By: Patient Assigned Provider: [REDACTED] Service Provider: ALL PROVIDERS Exclude Inactive Patients: ☒ True ☐ False

Preview

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