

# Insurance Accounts Receivable Summary (insaging)



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2007/10/15 21:24:28

**PRINTING INSTRUCTIONS:** To print out copies of this document, browse to *Insurance Accounts Receivable Summary (insaging)* (<http://learn.pcc.com/insaging.pdf>) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <support@pcc.com> or (800) 722-1082.

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# 1. Introduction: insaging, the A/R Summary

The **insaging** report shows you an aged summary of your practice's outstanding charges broken down by insurance group. It is a helpful collection tool that can show you which carriers owe you the most money and how old those balances are. **insaging** is also a quick way to see your total A/R, and it will help you determine which insurance carriers need follow-up attention.

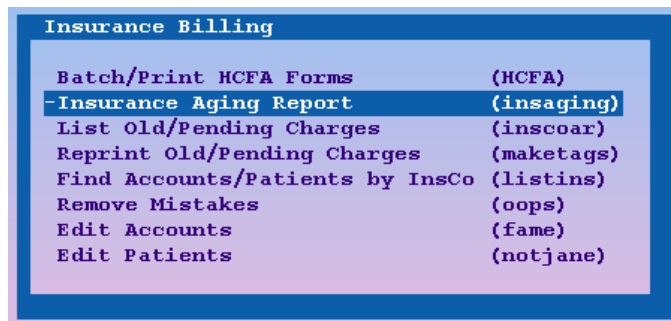
When used in conjunction with other reports, like **inscoar** (<http://learn.pcc.com/inscoar.html>) and **activity**, **insaging** helps explain the state of your receivables. You will be able to compare carriers and see how each one contributes to your total outstanding account receivable. For example, knowing that an insurance company comprises 25% of your total receivables, yet only represents a fraction of your patients, may be useful information the next time you review the payor's contract.

## Sample Problems for insaging

- Find out the total amount pending the Acme Insurance Group and how much of that amount is over 120 days old.
- Compare your Account Receivables month after month and see if you are making progress with your collections.
- Identify problem carriers that need special attention; identify carriers that you may need to resubmit HCFA's to before a submission deadline passes.

## 2. insaging Basics

You can find the **insaging** report in the "Insurance Billing" section of the "Billing Functions" window in your Partner Windows. You can also run it by typing **insaging** at a command prompt.



From the configuration screen, press **[F1 -- Generate Report]** to view the report. For report configuration options, see below.



Here is a sample **insaging** output:

```
Insurance Company Aging Report                               Generated on 06/01/00
By Transaction date, As of 05/31/00
All Providers
Current   30 - 59   60 - 89   90 - 119   120+   Total Perc
-----
Personal   3,515     9,410    12,994     9,408    24,342    59,671    32%
```

*Insurance Accounts Receivable Summary (insaging)*

Other	7,357	777	399	0	0	8,534	4%
Anthem	361	230	0	0	0	591	0%
Aetna	3,392	2,011	0	0	0	5,403	2%
Aetna/HMO	2,542	171	105	0	0	2,818	1%
Affordable	1,185	497	171	0	0	1,853	1%
BCBS	4,652	1,024	385	0	0	6,062	3%
CIGNA	9,016	1,228	466	1,736	1,846	14,294	7%
HARRIS	1,544	1,015	215	24	0	2,798	1%
HUMANA	5,056	855	89	2,973	1,363	10,336	5%
Medicaid	829	41	0	0	0	870	0%
ONE Health	1,089	782	51	0	0	1,922	1%
PHCS	8,089	2,716	336	0	0	11,142	6%
.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.
UNITED	5,897	793	331	3,370	1,685	12,076	6%
-----							
Total	69,922	26,034	18,421	20,323	47,055	181,757	
Percentage	38%	14%	10%	11%	25%		

Total Aging	181,757
Personal Credits across entire practice	57,127
Medicaid Credits across entire practice	0
-----	
Total A/R	124,629

Your practice's accounts receivable is shown subtotaled by insurance group, including a "Personal" group for outstanding personal charges. For each group, **insaging** lists the outstanding A/R that is "Current" or less than 30 days old, 30-59, 60-89, 90-119, and over 120 days old. The total outstanding balance and the percentage of your practice's total A/R are also listed. The report totals your A/R in each of the aging categories and also notes outstanding personal and Medicaid credits listed on the system.

**Tip:** All numbers are rounded to the nearest dollar amount.

**Evaluating Insurance Companies:** Comparing the "Percent of Total A/R" column with the percentage figures from the **activity** report will allow you to see when an insurance group's percentage of your total outstanding balance do not line up with its percentage of your office's workload. This can help identify "good" and "bad" payors.

### 3. Configuration and Customization Options for insaging

You can change how the report ages receivables, ask Partner to recalculate aging to a different date, limit the report to a specific provider, and make many other changes. Here is the options screen you will see when first running **insaging**:

Page Up	F12	Page Down
<b>INSURANCE ACCOUNTS RECEIVABLE SUMMARY</b>		
<b>Aged How?</b>		<b>Aged as of what date?</b>
<input checked="" type="checkbox"/> Transaction Date	<input checked="" type="checkbox"/> Use Nightly File for 03/29/05	
<input type="checkbox"/> Posting Date	Use Existing File made on 00/00/00 for 00/00/00	
<input type="checkbox"/> Payor Date	Regenerate as of: 04/05/05	
<b>Destination</b>		<b>When to Run</b>
<input checked="" type="checkbox"/> Screen	<input checked="" type="checkbox"/> Right Now	
<input type="checkbox"/> Mailbox	<input type="checkbox"/> In The Background *	
<input type="checkbox"/> Printer: _____	<input type="checkbox"/> Later, at: _____ *	
Generate the following reports:		<input checked="" type="checkbox"/> All Providers
* - you cannot send the report to the screen if you select these options		
Generate Report		

### Aging Options

- Aged How?*

By default, **insaging** calculates the age of your A/R by the "Transaction Date."

You can set **insaging** to age by "Posting Date", which is when each charge was entered into your system. This will change the amounts in the report's aging categories if your office often posts visits long after they occur.

Finally, you can choose to age by "Payor Date," which ages by the date each balance became the current carrier's responsibility. For example, charges that have recently been forwarded to a secondary insurance will appear as "Current" even though the transaction occurred more than a month ago.

- Aged as of what date?*

Since aging calculations involve every charge on your system, they are performed each night and stored in a "Nightly File". **insaging** uses the previous evening's Nightly File by default. You can tell **insaging** to regenerate a file representing unpaid charges aged to any date you prefer. Once you have regenerated an aged nightly file, you can select that report again by choosing the "Use Existing File..." option.

### Output Options in insaging

- Destination*

Choose whether you want to view the report on your screen, mail it to your e-mail inbox, or print it on a specified printer.

- When To Run*

### *Insurance Accounts Receivable Summary (insaging)*

Run the report "Right Now" and have your terminal wait for the job to finish, run it "In The Background" so you can go on and do other things at the same time, or schedule the job to run "Later At" a specified time.

- *Generate...*

You can include charges for all providers, or select individual providers or a provider group. PCC can help you set up any provider group you would find useful for A/R Analysis.

**Tip:** As with **aging**, all credits are assigned (by default) to the *Office* provider. If this provider is not included when the report is run, then no credits will be reported.

### **Understanding and Configuring Insurance Groups in insaging**

- **insaging** tallies charges by the plan they are pending. Charges that do not pertain to an insurance company are totaled in the *Personal* line of the report.
- If you see a blank line in the middle of the **insaging** report, there is an active insurance group in the Table Editor (**ted**) with no plans assigned to it.
- Use the **byins** program to review how your insurances are grouped. Edit your Insurance Companies and Insurance Groups tables in **ted**) to regroup plans if necessary. For example, you may want to consolidate two insurance groups with very few plans and little activity, or you may choose to break up an insurance group if it represents a large portion of your business and you want to track it more closely.