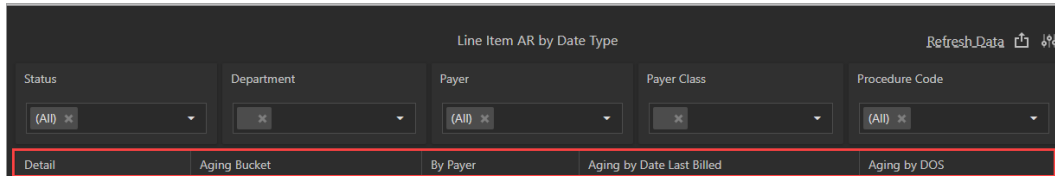# Line Item AR By Date Type Dashboard

Last Modified on 10/14/2022 1:43 pm EDT

> **Path: Main Menu > Practice Management Menu > Billing Reports > Line Item AR By Date Type**

About

The Line Item Report AR dashboard displays detailed data of specific Line Items with an open balance and can be accessed in NextStep Clinical. The dashboard contains tabs containing different data:

- **Detail**: Shows the individual Line Items with an open balance within the date parameters set.
- **Aging Bucket**: Shows a bar graph with balance and sum of open balance broken down into 0-30, 31-60, 61-90, 91-120, 121-150, 151-180, and Over 180 buckets.
- **By Payer**: Shows Billed Amount, Payment Amount, Allowed Amount, Balance, Age, and number of Line Items by Payer. The DOS (Date of Service) column shows the earliest DOS included in the dataset.
- **Aging by Date Last Billed**: Shows aging buckets by the last billed date.
- **Aging by DOS**: Shows aging buckets by Date of Service.

In this article:

- Run the Line Item AR by Data Type Dashboard
- Export the Data

Run the Line Item AR by Data Type Dashboard

1. Navigate to the Line Item AR by Date Type Dashboard:**Main Menu > Practice Management Menu > Billing Reports > Line Item AR By Date Type**.
2. Set your dashboard parameters/filters. You can use the filtersindividually or in combination.

Dashboard Parameters

a. Click the **Dashboard Parameters** [icon] button in the upper right-hand corner of the dashboard.
b. Select a **Start Date** and **End Date** from the respective calendars or type directly into the fields.
c. Click the **ReferenceDate** drop-down and select**DOS** (Date of Service), **DINVOICED** (date claim or bill was sent), or **DBILLED** (date the Service became a Line Item).
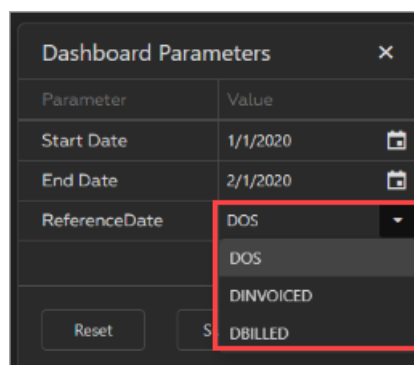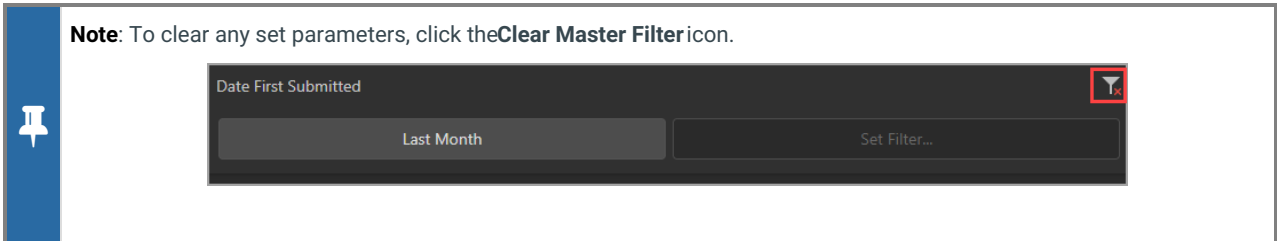
a. Click the **Submit** button.

Date First Submitted

    a. Click the **Last Month** button or the **Set Filter** button and select your dates from the calendar and click the **Apply** button.
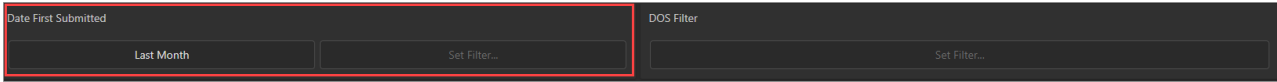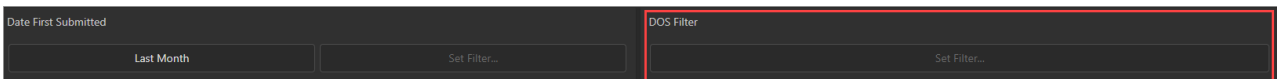

> 📌 **Note**: To clear any set parameters, click the **Clear Master Filter** icon.
>
>

DOS Filter

    a. Click the **Set Filter** button and select your dates from the calendar and click the **Apply** button.


3. *(Optional)* Select a **Filter** drop-down to filter the report further. For each drop-down, multiple options can be selected.

- **Status**: Defaults to All. Options include Closed, Not Sent, and Sent.
- **Department**: Default is blank.
- **Payer**: Defaults to All.
- **Payer Class**: Default is blank.
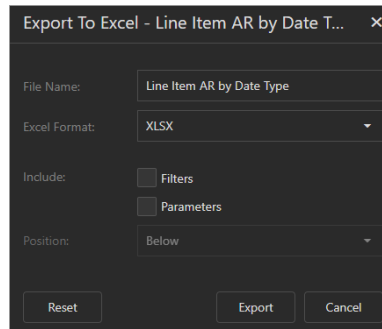- **Procedure Code**: Defaults to All.

Export the Data

You can export your report data from the top of the dashboard or under an individual tab of the dashboard.

1. Click the **Export To** button in the top right-hand corner of the dashboard or in the top right-hand corner of a specific tab of the dashboard you've selected. The Export To options are displayed.
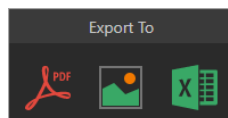
2. Click to either export as a **PDF**, **Image**, or **Excel** file.
3. Depending on the option selected, another window is displayed where you can change the File Name and select or deselect any other exporting options.

Example of Export To Excel:

4. Click the **Export** button. The report can be found in your Downloads folder from which you can save it to your workstation or network.