Accounts Receivable Dashboard

Last Modified on 10/14/2022 3:35 pm EDT

> **Path: Main Menu > Practice Management Menu > Billing Reports > Accounts Receivable**

About

The Accounts Receivable dashboard displays detailed views of your Agency's account receivables (A/R). The dashboard contains multiple widgets that allow you to drill down your data even further:

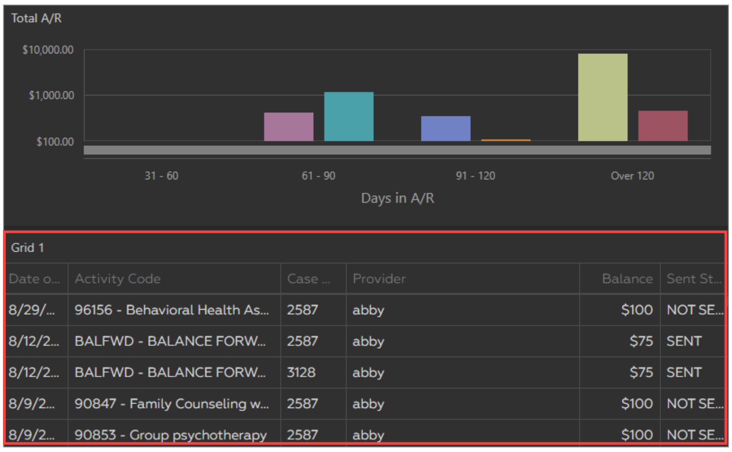
- **A/R History**: Shows a graphical representation of A/R over time. Hover over the graphs to see values.
- **Total A/R**: Shows how much of your total A/R is in the 31-60, 61-90, 91-120, and Over 120 buckets.
- **Insurance A/R**: Shows how much of your insurance A/R is in the 31-60, 61-90, 91-120, and Over 120 buckets.
- **Patient A/R**: Shows how much of your patient A/R is in the 31-60, 61-90, 91-120, and Over 120 buckets.

In this article:

Run the Accounts Receivable Dashboard

1. Navigate to the Accounts Receivable dashboard: **Main Menu > Practice Management Menu > Billing Reports > Accounts Receivable**
2. Set your dashboard parameters:
   a. Click the **Dashboard Parameters** icon in the upper right-hand corner of the dashboard.
   b. Select a **Start Date** and End date from the respective calendars or enter a date range directly into the fields.
   c. Click the **Submit** button.
3. *(Optional)* Select a Filter drop-down to filter the report further. For each drop-down, multiple options can be selected.
   - **Providers**: Defaults to All
   - **Program**: Defaults to All
   - **CPT Code**: Defaults to All
   - **Locations**: Defaults to All
4. *(Optional)* Drill down data:

- **Total A/R**: Hover over the bar graphs to see more information, and click on a bar graph to drill down to see Sent Status, Program, Payer, and Provider. The data is displayed in Grid 1 below the Total A/R section.



- **Insurance A/R**: Hover over the bar graphs to see more information, and click on a bar graph to drill down to see by Payer and Provider.
- **Patient A/R**: Hover over the bar graphs to see more information, and click on the bar graph to drill down to see by Client.

> **Note**: If you drill down the data in the Insurance A/R and Patient A/R sections, you can click the **Drill Up** button to get back to the top-level data.
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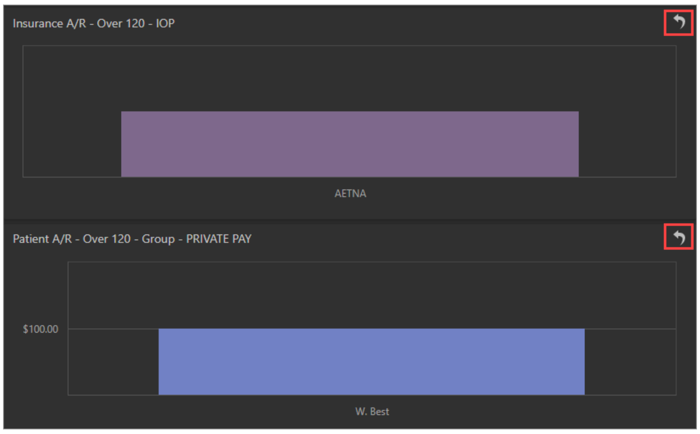
> 
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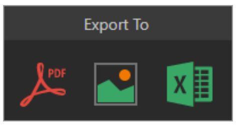
Export the Data

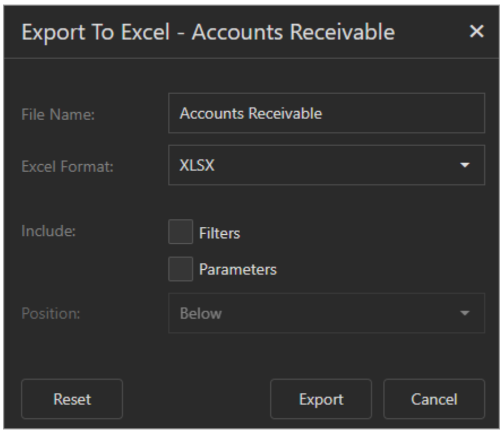
You can export your report data from the top of the dashboard or under an individual tab of the dashboard.

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 widget of the dashboard. 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.