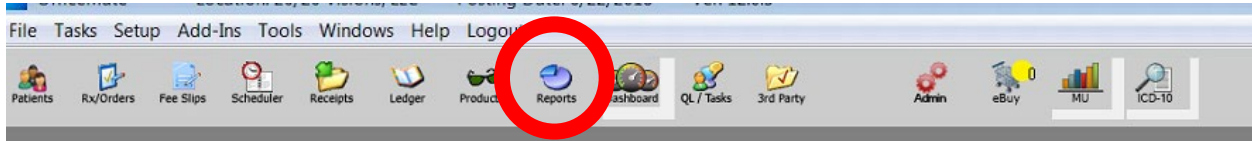
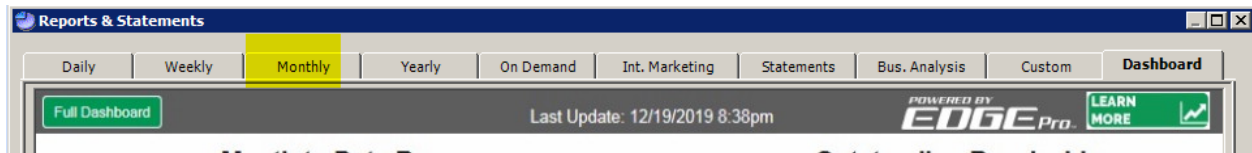


# OfficeMate AR Reporting-Summary

Open reports



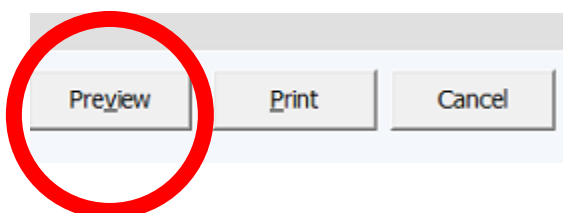
Click Monthly Tab.



Choose Insurance Aging summary

Prt	Report Name
<input type="checkbox"/>	Accounts Receivable Variance
<input type="checkbox"/>	Frame Sales Detail by Manufacturer
<input type="checkbox"/>	Frame Stock Status
<input type="checkbox"/>	Insurance Aging by Patient Detail
<input type="checkbox"/>	Insurance Aging by Patient Summary
<input checked="" type="checkbox"/>	Insurance Aging Summary
<input type="checkbox"/>	Monthly Production Summary
<input type="checkbox"/>	Patient Aging - Detail
<input type="checkbox"/>	Patient Aging - Summary
<input type="checkbox"/>	Patients w/No Recall Date
<input type="checkbox"/>	Patients w/Past Due Recall
<input type="checkbox"/>	Production
<input type="checkbox"/>	Top Selling Frames - Detail
<input type="checkbox"/>	Top Selling Frames - Summary

Once the report type is chosen, click preview buoon.



Once in preview, use the criteria as displayed below. For Output, you may choose to print or save to file, or both.

**Patient and Insurance Aging Reports**

**Report**

Report Name: Insurance Aging Summary  Use as Title   
Report Type: Aged A/R Report 30-60-90-120+   
Report Detail: Insurance Company

**Data Selection**

Period End Date: 12/20/2019 Minimum Days Outstanding: 0 Exclude before: 1/ 1/2000

**Report Options**    Regions - ALL    Locations - ALL    Providers - ALL

Patient Balances  
Last Name From:   
Through:

Insurance Balance  
Insurance Company: (All)  
Insurance Plan:   
 Show Patient Insurance Details (Landscape Mode)

**Balance Types**

Fee Slip Balances  
 Unapplied Deposits

**Additional Patient Data**

Patient Notes     'In Collection' Indicator  
 Patient Alerts     'Cash Only' Indicator

Age by 'Transfer From Insurance' date (if applicable) instead of Fee Slip date

**Report Grouping**

Group By:  Region     Location     Provider     Balance Type     Insurance     Patient     Fee Slip

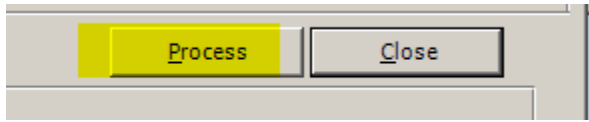
**Output**

Printer    Ericom AccessNow Printer (redirected 4)  
 CSV File    Folder: C:\OfficeMate\Export  
File Name: Aged AR.csv

Total Insurance Company amounts owed aged and grouped by Insurance Company.

You can click the process button.



At this point the report should appear on screen. Click print or save icon in top, left, as desired.

Main Report

**Insurance Aging Summary**

Period End: 12/20/2019

Insurance Company	Balance	Current	31-60	61-90	91-120	> 120	Unapplied
Aetna: (800) 444-2121	\$596.66					\$596.66	
Blue Cross Blue Shield: (800) 321-1234	\$1,725.97					\$1,725.97	
Cigna: (800) 989-0099	\$906.99					\$906.99	
Eye Care Plan Of America - Region 1: 80	(\$201.00)					\$205.00	(\$406.00)
Medicaid: (800) 231-2121	(\$10.00)						(\$10.00)
Medical Eye Services: 818-456-8503	\$10.00					\$20.00	(\$10.00)
Medicare: 310-555-6486	\$254.99					\$254.99	
Vision Service Plan: (800) 615-1883	\$60.00					\$160.00	(\$100.00)
<b>Report Total</b>	<b>\$3,343.61</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,869.61</b>	<b>(\$526.00)</b>
	100%	0.0%	0.0%	0.0%	0.0%	116%	

\*\*Please save as PDF if available, if not, Excel will work as a secondary.