



Running an Aging Analysis in eCW for the Patient Accounting Archive

This document provides a step-by-step guide for running an Aging Analysis report in eClinicalWorks (eCW), specifically for Patient Accounting Archive projects. This allows you to provide Aesto Health with a valid report that includes all relevant financial categories like Active AR, Bad Debt, and any other miscellaneous types to ensure accurate dollar amounts for data analysis once the data is imported into your portal.

Step 1: Preparation

- Access Rights:** Ensure you have the necessary permissions in the **eClinicalWorks** portal to run and export reports.
- Billing Data Accuracy:** Confirm all billing data is up-to-date and correctly entered.
- Backup Verification:** Ensure no new data has been entered since the backup provided to Aesto Health was completed.

Step 2: Run the Aging Analysis Report

- Open the **eClinicalWorks** portal and log in with your credentials.
- Click **Menu** (see [Figure 1.1](#)).



Figure 1.1: The Menu Button in the eClinicalWorks Portal

3. Select **Reports > eBO Reports** (see [Figure 1.2](#)).

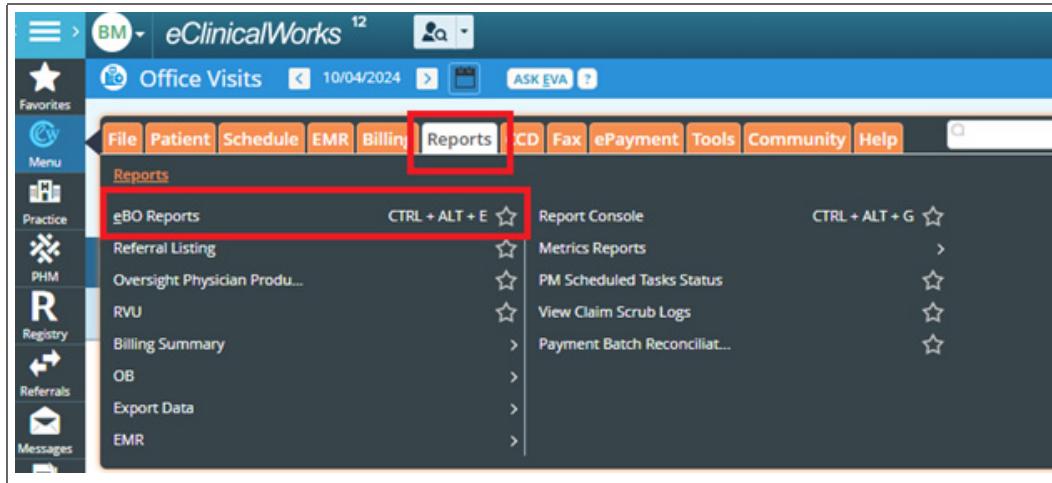


Figure 1.2: The Reports > eBO Reports Menu Selections

4. The eClinicalWorks eBO Analytics window is displayed. Click **eCWEBO** (see [Figure 1.3](#)).

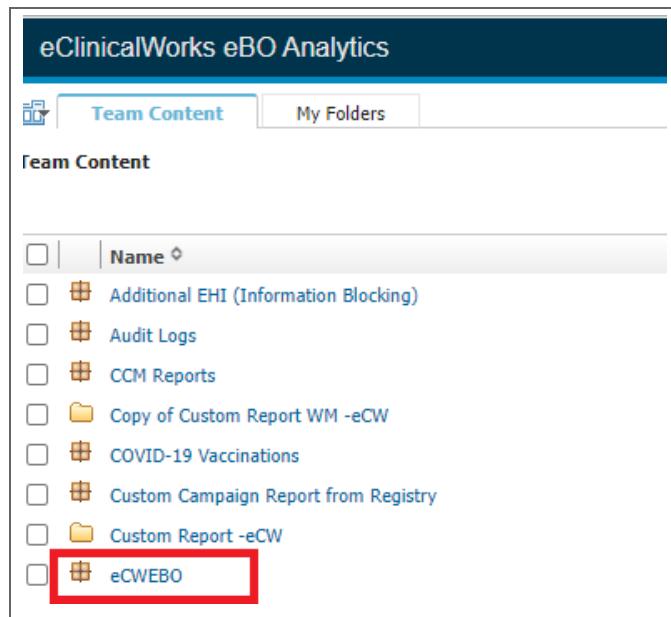
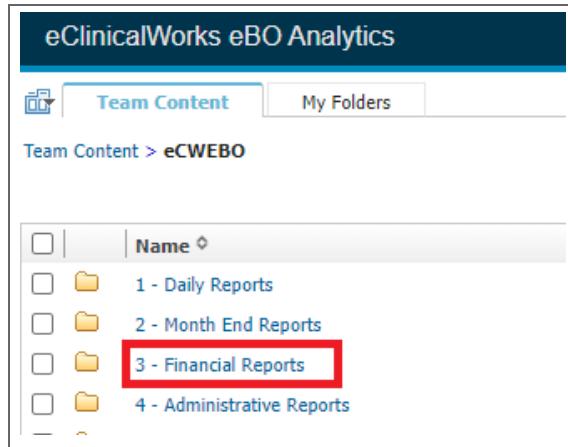


Figure 1.3: The eClinicalWorks eBO Analytics Window

5. Click **3 - Financial Reports** (see [Figure 1.4](#)).

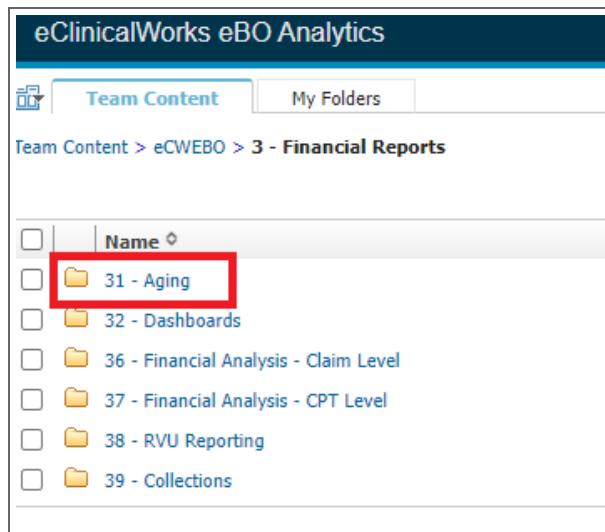


The screenshot shows the 'eClinicalWorks eBO Analytics' interface. The top navigation bar includes 'Team Content' and 'My Folders'. Below the navigation, the path 'Team Content > eCWEBO' is displayed. The main content area is a list of folders under 'eCWEBO', ordered by name. The folder '3 - Financial Reports' is highlighted with a red box. Other visible folders include '1 - Daily Reports', '2 - Month End Reports', '4 - Administrative Reports', and a collapsed section indicated by a minus sign.

	Name
<input type="checkbox"/>	1 - Daily Reports
<input type="checkbox"/>	2 - Month End Reports
<input type="checkbox"/>	3 - Financial Reports
<input type="checkbox"/>	4 - Administrative Reports

Figure 1.4: The Financial Reports Selection

6. Click **31 - Aging** (see [Figure 1.5](#)).



The screenshot shows the 'eClinicalWorks eBO Analytics' interface. The top navigation bar includes 'Team Content' and 'My Folders'. Below the navigation, the path 'Team Content > eCWEBO > 3 - Financial Reports' is displayed. The main content area is a list of sub-folders under '3 - Financial Reports', ordered by name. The folder '31 - Aging' is highlighted with a red box. Other visible sub-folders include '32 - Dashboards', '36 - Financial Analysis - Claim Level', '37 - Financial Analysis - CPT Level', '38 - RVU Reporting', and '39 - Collections'.

	Name
<input type="checkbox"/>	31 - Aging
<input type="checkbox"/>	32 - Dashboards
<input type="checkbox"/>	36 - Financial Analysis - Claim Level
<input type="checkbox"/>	37 - Financial Analysis - CPT Level
<input type="checkbox"/>	38 - RVU Reporting
<input type="checkbox"/>	39 - Collections

Figure 1.5: The Aging Selection

7. Click **31.08 - Patient Balance Aging Report - Detail** (see [Figure 1.6](#)).

The screenshot shows the 'eClinicalWorks eBO Analytics' interface. The top navigation bar includes 'Team Content' and 'My Folders'. Below the navigation, the path 'Team Content > eCWEBO > 3 - Financial Reports > 31 - Aging' is displayed. A list of reports is shown, with '31.08 - Patient Balance Aging Report - Detail' highlighted by a red box. The report list includes:

- 31.01 - Aging Summary Analysis Report
- 31.05 - Historical Aging Summary Analysis Report
- 31.07 - Aging Summary Snapshot (Payer vs Patient/Self-Pay Balance)
- 31.08 - Patient Balance Aging Report - Detail** (highlighted)
- 31.09 - Payer Claim Aging - Detail
- 31.10 - CPT Aging Balance
- 31.11 - Historical Aging with Tax ID

Figure 1.6: The Patient Balance Aging Report - Detail Selection

8. Using the table and screen provided, enter the following report criteria (see [Figure 1.7](#)).

Table 1: Report Parameter Selections

Field	Parameter Selection
Use Date Range	Select No .
Date Type	Select Custom Date , then enter the date range. NOTE: The date range should be from the oldest date that the system was used to date of when the backup was taken to be submitted to Aesto.
Age the Report By	Select Service Date .
Collection Status	Select All .
Filter Charges by	Select Service Date .
Display CPT	Select No .
Balance Range	Select Lowest value to Highest value
Group the Report by:	Group 1: Select Patient Name Group 2-4: Select None . Subtotal 1-3: Select No .

Table 1: Report Parameter Selections

Field	Parameter Selection
Aging buckets to be displayed:	Select the following aging buckets: <ul style="list-style-type: none"> • 0 - 30 Days • 31 - 60 Days • 61 - 90 Days • 90 - 120 Days • 121 - 150 Days • 151 - 180 Days • >180 Days

31.08 - Patient Balance Aging Report - Detail

Use Date Range:
 No

Date Type:
 Custom Date
 Jan 1, 1990 Oct 15, 2024

Age the Report By: Service Date **Collection Status:** All

Filter Charges by: Service Date **Display CPT:** No

Balance Range:
From:

 Lowest value

To:

 Highest value

Group the Report by:

Group 1: <input type="button"/> Patient Name	Subtotal 1: <input type="button"/> No
Group 2: <input type="button"/> None	Subtotal 2: <input type="button"/> No
Group 3: <input type="button"/> None	Subtotal 3: <input type="button"/> No
Group 4: <input type="button"/> None	

Aging buckets to be displayed:

<input checked="" type="checkbox"/> 0 - 30 Days	<input checked="" type="checkbox"/> 31 - 60 Days
<input checked="" type="checkbox"/> 61 - 90 Days	<input checked="" type="checkbox"/> 91 - 120 Days
<input checked="" type="checkbox"/> 121 - 150 Days	<input checked="" type="checkbox"/> 151 - 180 Days
<input checked="" type="checkbox"/> > 180 Days	<input type="checkbox"/> 181 - 210 Days
<input type="checkbox"/> 211 - 240 Days	<input type="checkbox"/> 241 - 270 Days
<input type="checkbox"/> 271 - 300 Days	<input type="checkbox"/> 301 - 330 Days
<input type="checkbox"/> 331 - 360 Days	<input type="checkbox"/> > 360 Days

Select all Deselect all

Figure 1.7: The Patient Balance Aging Report - Detail Window

9. Once the configurations are complete, view the report in CSV Format by navigating to the **HTML** drop-down list at the top of the screen, then select **View in Excel Options > View in CSV Format** (see [Figure 1.8](#)).

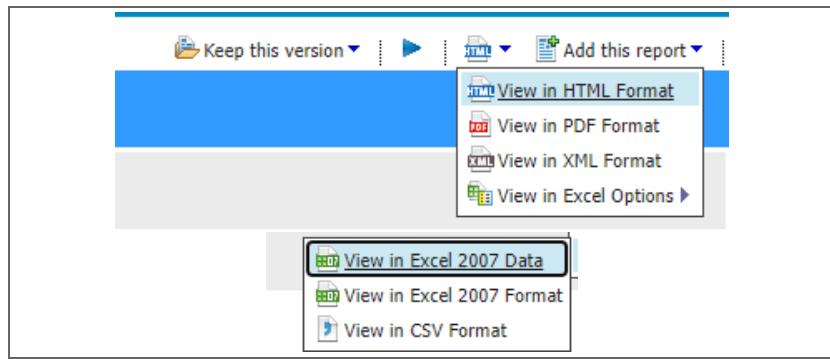


Figure 1.8: The View in CSV Format Selection

10. Save the report with the filename *PatientBalanceAgingReport-[Facility Name].csv* to your system for upload to the DataCapture portal.

Step 3: Review the Report

Open the saved report and review the data for accuracy.



NOTE: Please be aware that invoices on the ATB will not be included in the Patient Accounting Archive, as they are not associated with a patient account.

Step 4: Upload Report to the DataCapture Portal

1. End users must have permissions assigned to upload portal attachments by configuring the user's role.
 - a. Navigate to **Administration > User Permission**.
 - b. Select the **Role** from the drop-down list.
 - c. Expand the **Administrator** category, and check the **Access** box for **Practice Attachments**.
2. With permissions assigned, click the **Practice Attachment** button to open the Attachments window. The left side of the Attachments window contains a list of previously uploaded attachments with details such as file ID, description, uploaded by, and upload date. The right side of the window is where attachments are uploaded. (See [Figure 1.9](#))

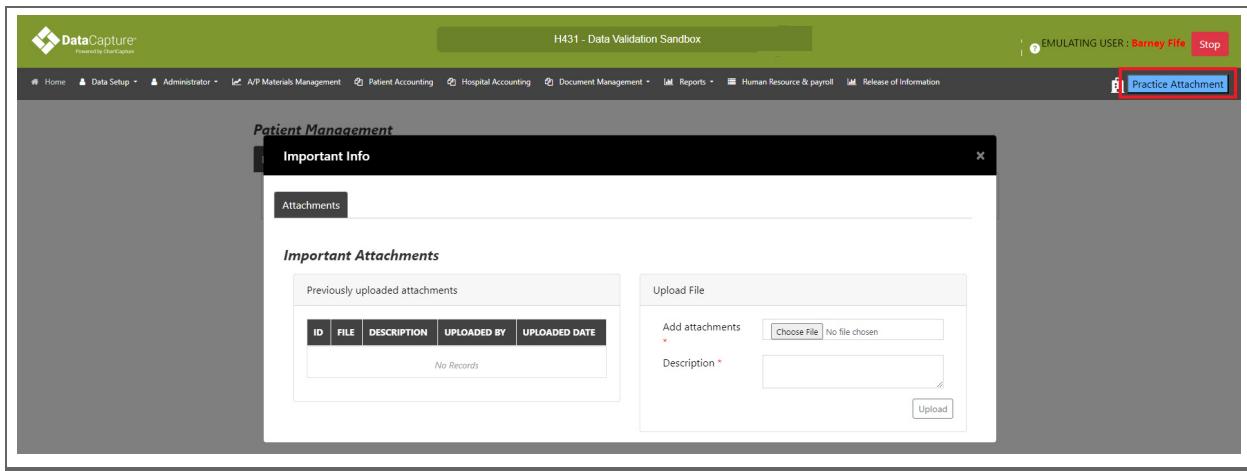


Figure 1.9: The Attachments Window

3. To upload an attachment:
 - a. Click **Choose File** to locate the file to upload.
 - b. Enter a **Description** of the file.
 - c. Click **Upload** to upload the file to the DataCapture portal. Once uploaded, the file will appear in the list.



NOTE: To download or view attachments from the list, use the blue icons in the attachment's **File** column.