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

1. **Access Rights:** Ensure you have the necessary permissions in the **eClinicalWorks** portal to run and export reports.
2. **Billing Data Accuracy:** Confirm all billing data is up-to-date and correctly entered.
3. **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

1. Open the **eClinicalWorks** portal and log in with your credentials.
2. 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*).

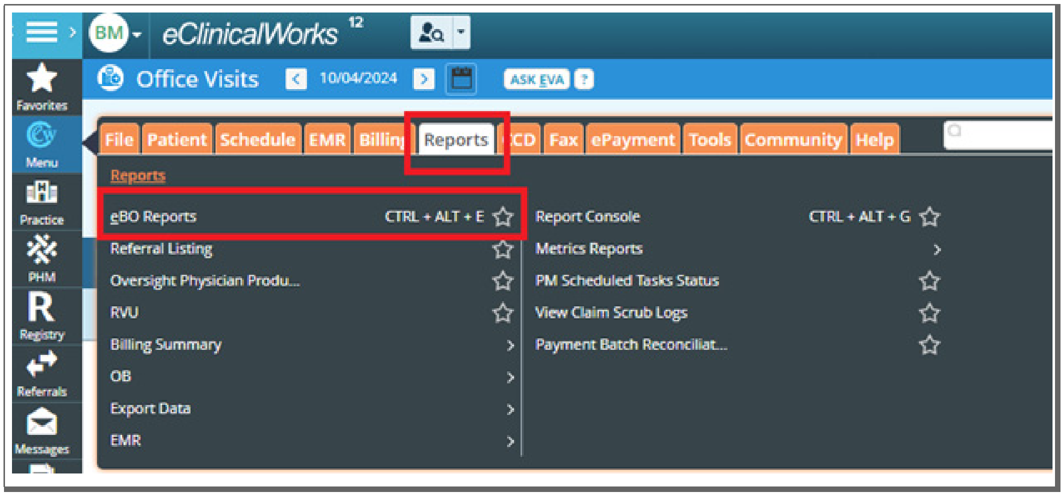

Figure 1.2: The Reports > eBO Reports Menu Selections

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

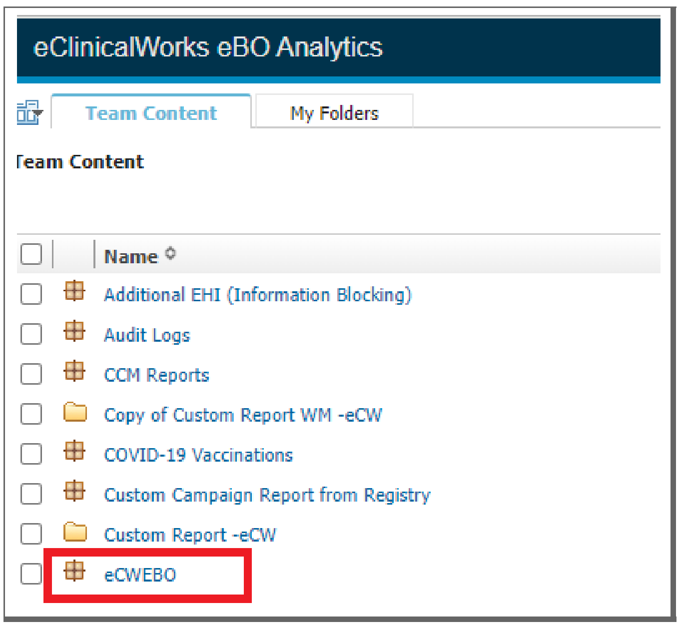

Figure 1.3: The eClinicalWorks eBO Analytics Window

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

Figure 1.4: The Financial Reports Selection

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

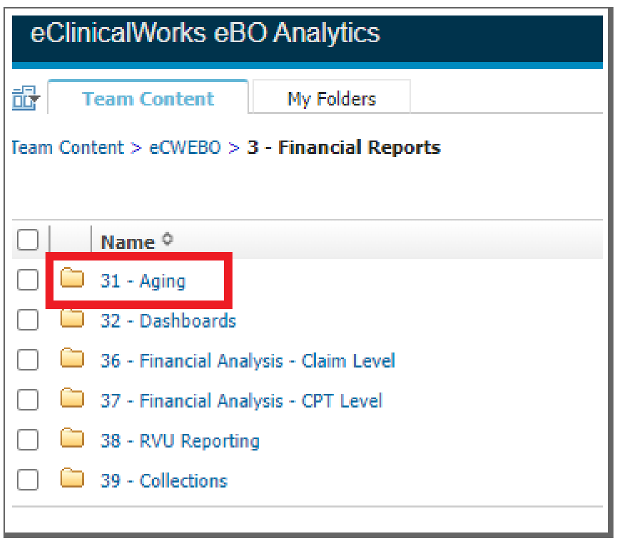

Figure 1.5: The Aging Selection

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

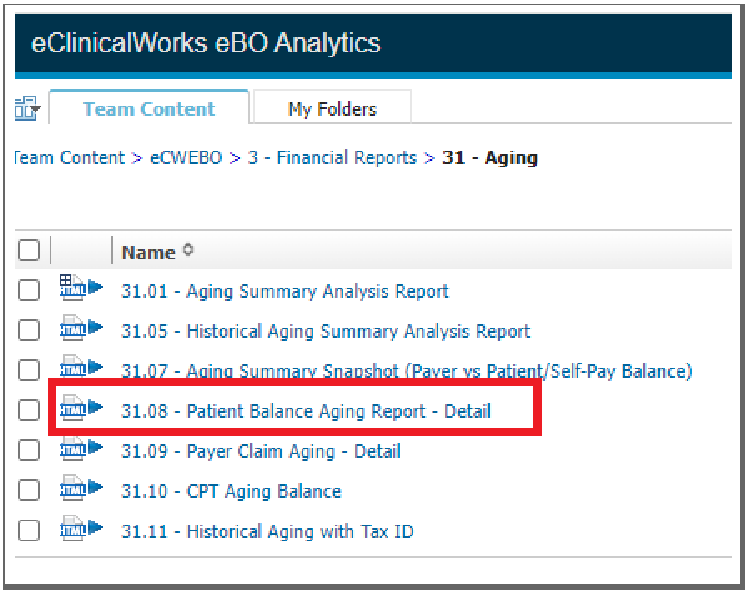

Figure 1.6: The Patient Balance Aging Report - Detail Selection

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: • **0 - 30 Days** • **31 - 60 Days** • **61 - 90 Days** • **90 - 120 Days** • **121 - 150 Days** • **151 - 180 Days** • **>180 Days**

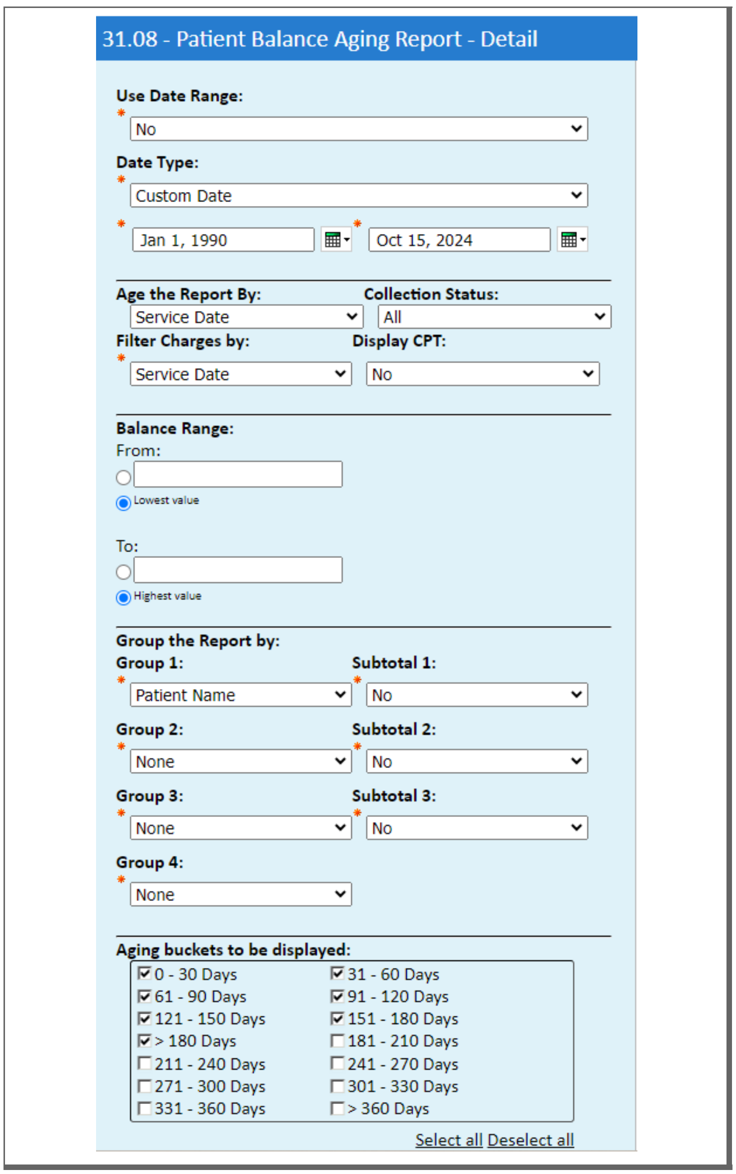

Figure 1.7: The Patient Balance Aging Report - Detail Window

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*).

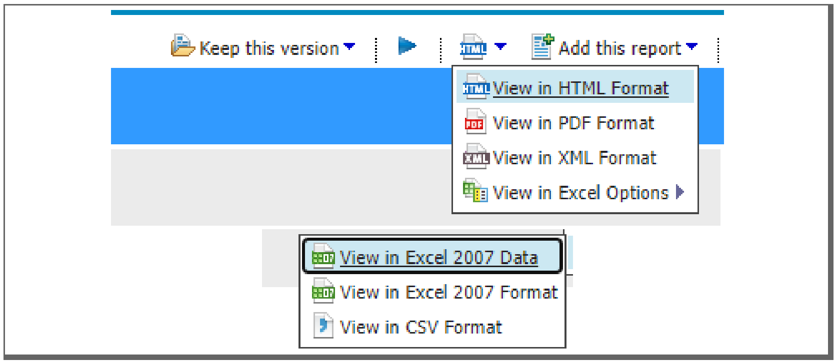

Figure 1.8: The View in CSV Format Selection

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*)

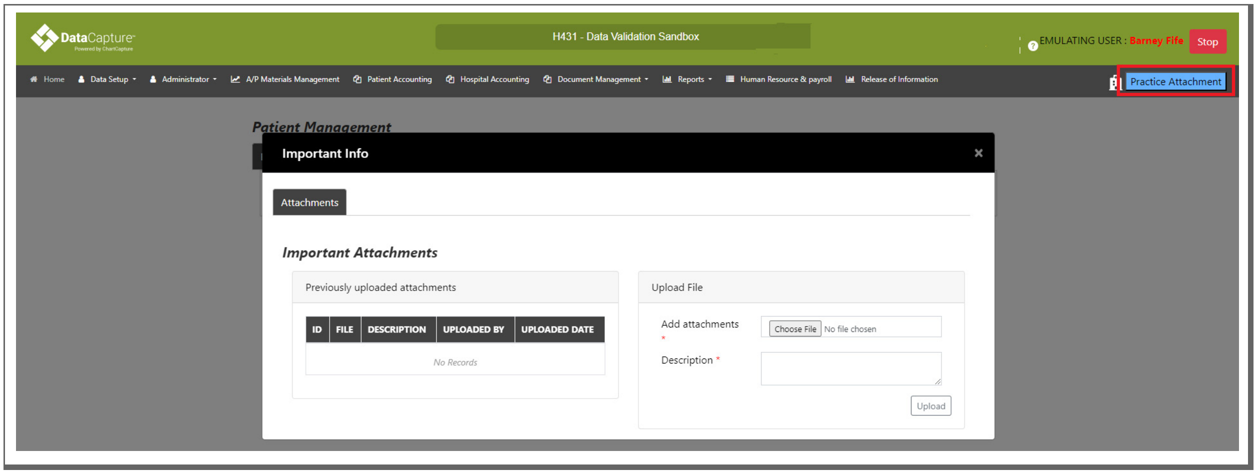

Figure 1.9: The Attachments Window

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.*