Aging Analysis Report

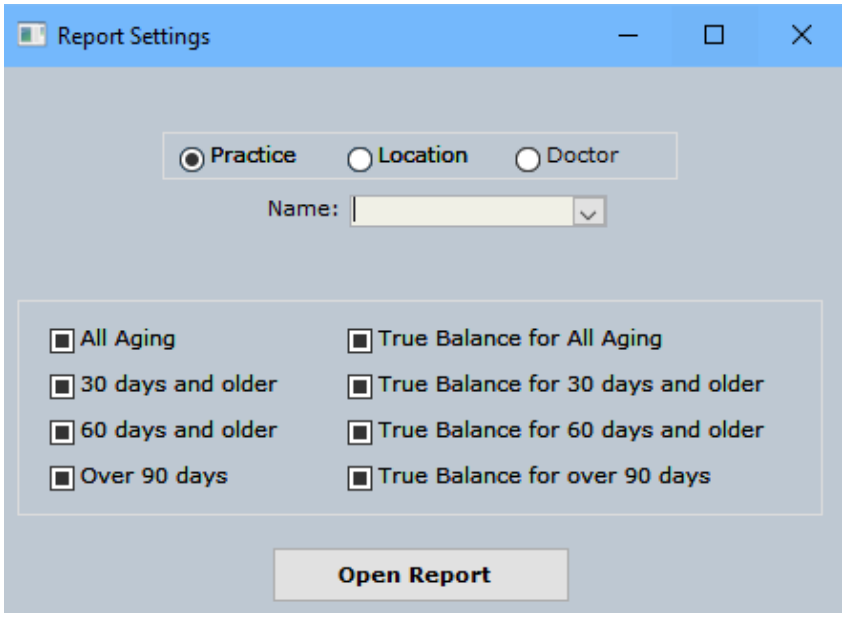
809 TDO KB February 25, 2026 Reporting Tools 8.10K

Overview:

The Aging Analysis report breaks down your accounts receivable by the age of the account. It can be useful in determining which patients to contact regarding their balance.

Detailed Instructions

Open [Reporting Tools > Financial > Aging Analysis]



All Aging

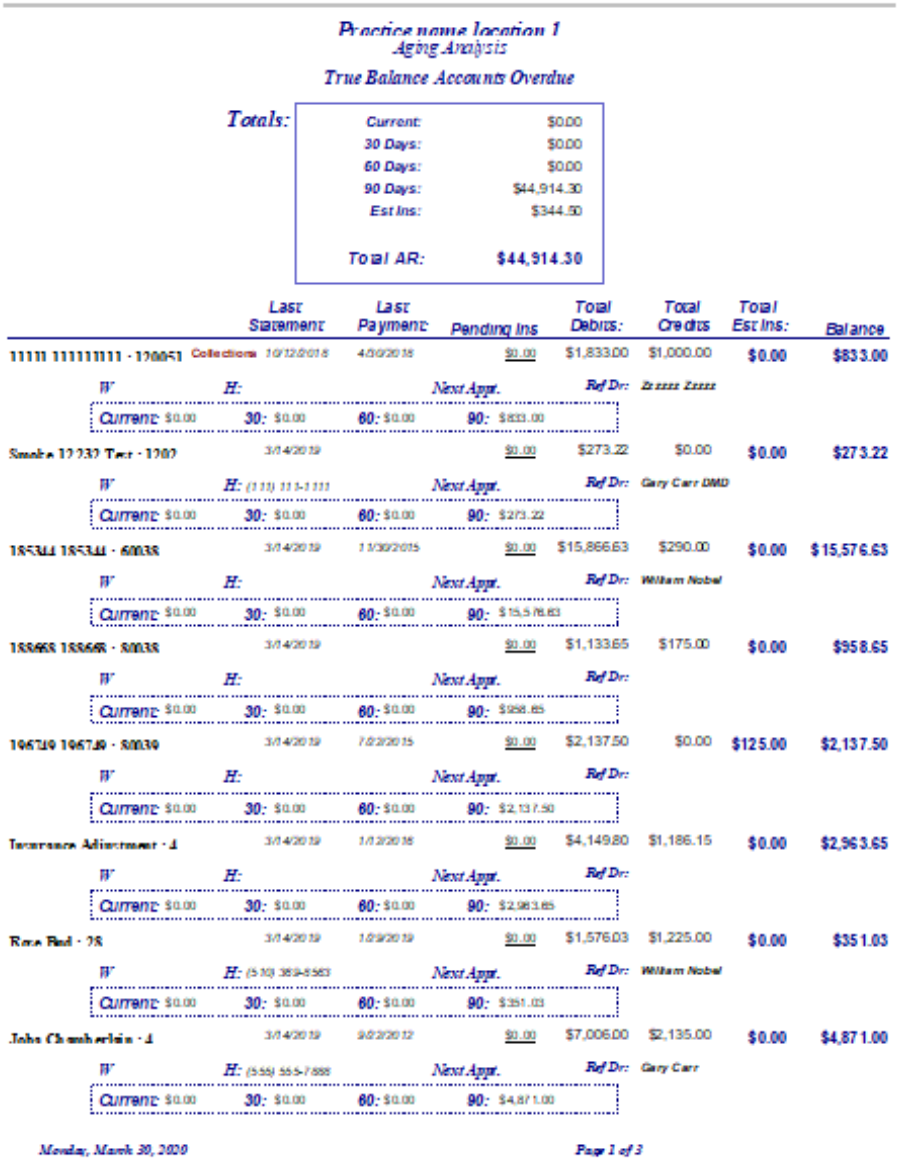
This displays all patients with a positive balance on their ledger regardless of their treatment status.

True Balance

This report displays patients with a ledger balance AND have:

1. All teeth closed. (i.e. completed RCT or no endodontic procedure performed [No Proc]). The open teeth report (Reports > Administrative > Open teeth) should be reviewed on a regular basis to ensure all the appropriate teeth are being closed. If they are not undergoing treatment, mark as No Endodontic Procedure on the final report page.

2. All insurance claims closed. (Reports > Insurance > Outstanding insurance claims)



Practice name location 1
Aging Analysis
True Balance Accounts Overdue

Totals:		
	Current:	$0.00
	30 Days:	$0.00
	60 Days:	$0.00
	90 Days:	$44,914.30
	Est Ins:	$344.50
	Total AR:	**$44,914.30**

	Last Statement	Last Payment	Pending Ins	Total Debits:	Total Credits	Total Est Ins:	Balance
11111 111111111 · 100051 Collections	10/12/2018	4/30/2018	$0.00	$1,833.00	$1,000.00	$0.00	$833.00
W: H:			Next Appt.		Ref Dr: Zzzzz Zzzzz		
Current: $0.00	30: $0.00	60: $0.00	90: $833.00				
Smoke 12 232 Test · 1202	3/14/2019		$0.00	$273.22	$0.00	$0.00	$273.22
W: H: (111) 111-1111			Next Appt.		Ref Dr: Gary Carr DMD		
Current: $0.00	30: $0.00	60: $0.00	90: $273.22				
185344 185344 · 60035	3/14/2019	11/30/2015	$0.00	$15,866.63	$290.00	$0.00	$15,576.63
W: H:			Next Appt.		Ref Dr: William Nobel		
Current: $0.00	30: $0.00	60: $0.00	90: $15,576.63				
185668 185668 · 60035	3/14/2019		$0.00	$1,133.65	$175.00	$0.00	$958.65
W: H:			Next Appt.		Ref Dr:		
Current: $0.00	30: $0.00	60: $0.00	90: $958.65				
196749 196749 · 60039	3/14/2019	7/23/2015	$0.00	$2,137.50	$0.00	$125.00	$2,137.50
W: H:			Next Appt.		Ref Dr:		
Current: $0.00	30: $0.00	60: $0.00	90: $2,137.50				
Insurance Adjustment · 4	3/14/2019	1/12/2018	$0.00	$4,149.80	$1,186.15	$0.00	$2,963.65
W: H:			Next Appt.		Ref Dr:		
Current: $0.00	30: $0.00	60: $0.00	90: $2,963.65				
Rose Red · 28	3/14/2019	1/29/2019	$0.00	$1,576.03	$1,225.00	$0.00	$351.03
W: H: (510) 359-8563			Next Appt.		Ref Dr: William Nobel		
Current: $0.00	30: $0.00	60: $0.00	90: $351.03				
John Chamberlain · 4	3/14/2019	9/23/2012	$0.00	$7,006.00	$2,135.00	$0.00	$4,871.00
W: H: (555) 555-7888			Next Appt.		Ref Dr: Gary Carr		
Current: $0.00	30: $0.00	60: $0.00	90: $4,871.00				

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