Post Collection Agency payments: Create one receipt, even if it contains multiple patients, as an **'Insurance Payments'**. * Collection agency should be set up in the Insurance Library.

Payments Dashboard

Add Payment Receipt

Payment Type

Insurance Payment ▼   1

┌─ **Payment Information** ─────

Post Date   **Received Date**   C

07/20/2016   07/20/2016

Insurance   2

COLL2   🔍   COLLECTION -

Received Amount   **EFT**

$500.00   ☐

┌─ **Additional Info** ─────

Reference / Check Number

XXXX

Received From

1. Create a Receipt **'Insurance Payment'**
2. Enter the agency in **'Insurance ID'** field
3. [Save]

┌─ **Payment Posting Action** ─────

Do not Post   **Manually Post**   **Multip**

   ○   ◉   ☐

3

[Save [F2]] [Cancel]

Post Insurance Payment(s)   Receipt: **77486**

Receipt	Insurance			Note	
77486	COLLECTIONS 2 [COLL2]				
Received	Check Date	Posted	Reference	Received	
07/20/2016		07/20/2016	XXX	500.00	500.00

Patient ⑦   Name

E45173   4   🔍 (P) VALEN, FRANKIE

Post As Insurance   **Post As Responsibility**   **Crossed To Secondary**

(COLLECTIONS) COLLECTION [C ▼   - Default -   ▼   ☐   [Payment]

Patient: 3399   Encounter: 45173   Allowed: 0.00   **Paid: 20.00**   CO45: 0.00   PR3: 0.00   PR1: 0.00   PR2: 0.00   Othe

DOS	CPT	Charge	Balance	Paid	5	Fee	6
07/13/16	L3340	25.00	0.00	20.00		5.00	

4. Choose encounter
5. Enter paid amount
6. Enter Collection fee
7. [Save]

7

[Save [F2]] [Cancel]

<u>Post patient payments</u>: Occasionally, our patients may pay us on a Collection account.

1. Create a Patient Payment receipt.
2. On the 'Post Patient & Collections Payments' page, choose the 'Show' drop-down for 'Services with Collections Balance Only'
3. Check in the appropriate boxes as usual and
4. [Save]
5. Use [Post Adjustment] to post the collection fee, using the transaction code 'COLF'

Post Patient & Collection Payments   Receipt: 77487

Receipt Info

Receipt	Received Date	Posted	Check Date	Received Amount
77487	07/20/2016	07/20/2016		20.00

Patient		Balance
3160	EARNHARDT, GARY L	0.00

Guarantor		Balance
3283	EARNHARDT, GARY L	0.00

Payment Application

Show
Services With Collection Balance Only ▾   Include Additional Patients Under Same Guarantor [0] : ☐

Method   **Total Escrow**
Apply Manually   ▾   20.00

Patient	DOS [Encounter]	Dunning/Statement Count	Charge	Balance		Collection
[3160] EARNHARDT, GARY	04/23/2013 [18494]	3 / 0	112.00	0.00	☑	30.00
[3160] EARNHARDT, GARY	04/23/2013 [18494]	3 / 0	130.00	0.00	☐	16.38
[3160] EARNHARDT, GARY	04/23/2013 [18494]	3 / 0	15.00	0.00	☐	0.53

Save [F2]   Cancel

Transaction Codes:

IPC - Insurance Payment Collections

PPC - Patient Payment Collections

COLF - Collections Fee Adjustment

Encounter	Patient	Post Date	Transaction ▾	Amount
45173	Valen, Frankie	07/20/2016	IPC	20.00
45173	Valen, Frankie	07/20/2016	COLF	5.00

Reports:

We recommend running the following reports:

To view payments posted from the Collection Agency: '**Collections Payment**'

To view all accounts in Collection is '**Precollection/Collection**' filtered by 'In Collection'