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# **Pre-Collections**

This process allows a practice to manually or automatically queue up *Encounters* that should be reviewed for possible referral to Collections.

# How is the Pre-Collection worklist generated?

There are two ways the list can be generated

- **System Generated**: The number of Dunning levels defined in Statement Defaults (Admin > Statement Defaults) defines the maximum number of times a balance will be billed with no response. For example, when statements are batched, any Encounter with a Dunning Level = 3 that is eligible to be billed, will go to the Pre-Collections list rather than the Statement Batch.
- **Create your own**: If the 'No Dunning Limit' has been selected in Statement Defaults, you can use the [Make list] button (Statements > Pre-Collection > Make List) to manually create a pre-collection list.

# Do Encounters in Pre-Collections get statements?

It depends, if *all* the encounters are in pre-collection, then the guarantor does *not* receive statements. If the Guarantor has *any other* encounters that are eligible to be billed on statements, then the encounters that are in pre-collections will also be included on the statement (since you are already paying for the postage).

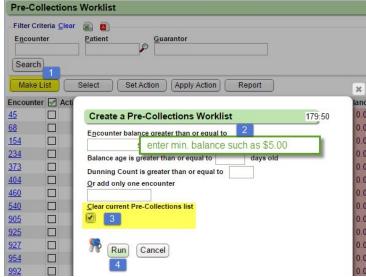
# How do I work the Pre-Collection worklist?

From the sidebar >Statements > [Precollection] The list is worked using the buttons from Left to Right.

### Make List

- 1. Click [Make List]
- 2. Enter Dunning Count, Minimum Balance, and/or any other criteria for the new list
- 3. Check 'Clear Current Pre-Collections List'
- This step is optional, and can be used in situations where you are looking to simply start with a fresh list.
- 4. Click [Run]





### Select

This is an optional function. You can use the filters to automatically select (check the boxes) of Encounters that match certain criteria. This is very useful if your list is very long.

Some users prefer to use the 'Click to Sort' options, for instance click on the column title

Make List Select Set Action Apply Action Report								
Encounter	🗹 Acti	on Guarantor	Name	Patient	DOS	Encounter Balance	Guaran	tor Balance 🔻 U
<u>27075</u>		<u>240970</u>		<u>1001024</u>	04/24/2015	7.91		Click to Sort
27808		240970		1001024	05/13/2015	24.76		206.16

'Guarantor Balance', so the largest balances are at the top of the list

# Set Action

Use the Checkboxes on the encounters you want to effect (if the 'Select' feature wasn't used), then click [Set Action]

Search				
Make Li	st	S	elect	Set Action
Encounter		Action	Guaranto	r Name
<u>27075</u>	<b></b>		<u>240970</u>	
<u>27808</u>	<b></b>		<u>240970</u>	
<u>27936</u>			<u>240970</u>	
<u>28142</u>			<u>240970</u>	
<u>26794</u>			<u>16181</u>	
<u>28689</u>			<u>29419</u>	
<u>26458</u>			<u>28962</u>	
<u>27194</u>			<u>28962</u>	

There are <b>2 record(s)</b> selected for the Please select action you want to perfor <u>Choose action</u>	
Please Choose	-
Please Choose	eed to enter the
Recalculate Balances	
Assign To User	
Reset Statement Counter to 0	
Reset Statement Counter to 1	
Reset Statement Counter to 2	
Reset Statement Counter to 3	
Delete	
Send To Collection	
Delete Completed Records	
<u>S</u> plit Method	
Assign all to Collection Agency	1 🔻

• Recalculate Balance: if the list is old it can be refreshed on a per encounter basis using this feature

• Reset Statement Counter: this refers to the Dunning Message Count - use this action to reset all checked encounters.

• Delete: delete encounter from this list -See below

• Send to Collections: in the screenshot below we have two Encounters we are sending to collection

Run Cancel

) TP

re-Collections Worklis Filter Criteria Clear

Encounter

🔊 🔊

Patient

Gu

### To Delete Encounters from the Pre-Collections list:

- 1. Select Encounter(s)
- 2. Click [Set Action]
- 3. Choose Action 'Delete'
- 4. Click [Run] this step *Marks* the record(s) for deletion
- 5. Click [Apply Action]
- 6. Click [Run] this step removes the records from the **Pre-Collections list**

# **Apply Action**

Encounter		Action	Guarantor			
<u>27075</u>		Coll:171	<u>240970</u>	Create a Pre-Collec	tions Worklist	119:30
27808		Coll:171	<u>240970</u>	Apply following actions Action	#Records	\$Amount
27936		Coll:171	240970	No Action	25	883.75
21000	-	0011.111	240010	-> Coll: 171	4	173.00
<u>28142</u>		Coll:171	<u>240970</u>	Delete	1	14.12
<u>26794</u>		Reset0	<u>16181</u>	Reset0	1	119.00
<u>28689</u>		Delete	<u>29419</u>	🐕 Run Cancel		
<u>26458</u>			<u>28962</u>			

#### Create a Pre-Co Apply following action No Action Make List Select Delete Action Guar 192 Run 6 Create a Pre-Colle 55 Cancel There are 1 record(s) selected af 2 to Places select action you want to perfo 192 <u>373</u> 404 <u>55</u> <u>192</u> <u>192</u> <u>352</u> 460 540 905 925 927 954 <u>316</u> <u>192</u> Collection Agency 1 <u>99</u> <u>27</u> Collection Agency 2 992 1053 1093 1110 1115 <u>78</u> Split Method Assign all to Collection Agency 1 <u>391</u> 4 Run Cancel

Use this to execute the actions you have 'Set' in the previous step. When you click the 'Apply Action' button, the system displays a summary of what Actions are going to be taken. Click 'Run'. The Encounters are then marked with the Action that was taken.

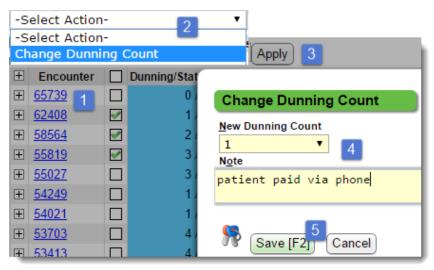
**Report >** used to report actions taken on this list

# How to reset Dunning message count

From the Pre-Collections Page

- 1. Choose Encounters
- 2. Click [Set Action]
- 3. Choose Action: Reset Statement Counter to....
- 4. [Run]
- 5. [Apply Action]

The Action column updates to 'Reset' following by the number chosen. The Dunning side of Dunning/Statement Column updates to the new count



#### Search There are 10 record(s) selected for a total of: 773.45 Please select action you want to perform on these records Set Action Make List Select Choose action Reset Statement Counter to 1 • 3 Encounter 🗹 🕰 Action Guarantor Nam If you choose Send To Collection you need to enter the following: 45382 10481 Assign to Userid User ID <u>50448</u> 1 10481 R Run <u>44673</u> V 10481 Make List Select Set Action Apply Action 5 Encounter 🗹 Action Guarantor Name Patient mt Dunning/Stat

5382 - +Reset1 10481

Create a Pre-Collections Worklist

# From the Patient dashboard

- 1. Choose Encounters in checkbox
- 2. Choose 'Change Dunning Count' from 'Select Action' drop-down
- 3. Click [Apply]
- 4. Choose new dunning count, add note
- 5. [Save]

x

179:35

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# Collections

# How do I Place an Encounter in Collections?

All Encounters must have a balance out to the patient

- Option 1 Use the [Pre-Collections] function as listed above
- Option 2 From the Encounter Dashboard use [To Collections] button
- Option 3 From the 'Patient Dashboard' >
- 1. Use the 'Select Action' Dropdown > Choose 'Send to/Remove From Collections'
- 2. Check all the Encounters with patient balance to send to collections
- 3. Click [Apply]
- 4. Choose which collection agency
- 5. Add a note
- 6. [Save]

				Transfer Balance to Patien
1 nd to/Remove	from Coll	lections	<ul> <li>Apply</li> </ul>	3
🗄 Encounter 🗹	InsBal	PatBal	ColBal	Send to/Remove from Collections
± <u>41468</u>	0.00	14.81	0.00	Send Encounters with Patient Balance to Collections
± <u>38709</u>	0.00	14.81	0.00	<u>Remove Encounters with Collection Balance from Collections</u>
± <u>38447</u>	0.00	20.00	0.00	Collection Agency 4
				COLL PCOLLECT AL -
Active Policies	nsurance M	lanageme	nt [Ctrl-F7]	patient refuses to pay 5
Insurance	Statu	s	Role	pacient refuses to pay
MED [109]	DEFAU	JLT PR	IMARY	
BCBS FL [102]	DEFAU	JLT SE	CONDAR	<b>6</b>
GARDENS [334]	DEFAU	JLT TE	RTIARY*	Save [F2] Cancel

# How to create a spreadsheet to upload to a Collection Agency? ....and update the records as 'Sent'

# Two Options:

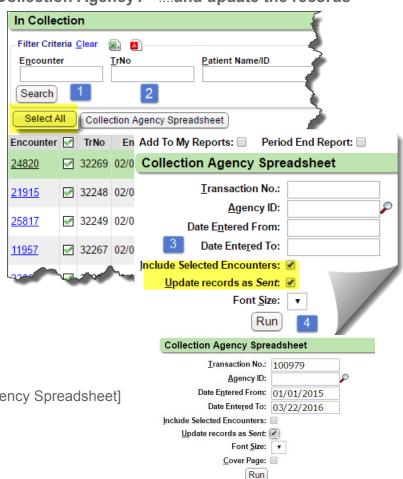
Option 1: This option is best when Encounters are turned over to collections individually from the Encounter Dashboard

# From Statements > [In Collections]

- 1. Select the individual Encounters to be sent or [Select All]
- 2. Click [Collection Agency Spreadsheet]
- 3. Select both checkboxes
  - Include Selected Encounters (required unless you use a Transaction Number)
  - Update records as 'Sent'
- 4. [Run]

Option 2: This option is best if Encounters are sent to collection <u>as a group</u> out of Pre-Collections (All Encounters will all be assigned the same Transaction number)

- 1. Statements > In Collections > [Collection Agency Spreadsheet]
- 2. Choose the Transaction Number
- 3. Select 'Update records as Sent'
- 4. [Run]



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Patient Dashboard

Change Dunning Count

Change Statement Type

Send to/Remove from Collections

Responsible Party

Select Action-

-Select Action-

Print Claim

[PATIENT/99]

# CATEGORY: PRE-COLLECTIONS COLLECTIONS

Note there are filters on the 'In Collection' page such as 'exclude sent encounter'

Ctrl+Ctrl Go! Statements Management Dashboard		
In Collection		
Filter Criteria Clear 👜 📵		
Encounter ID Transaction No. Patient Name/ID Insurance	Facility	Facility Group
Rendering Provider Billing Provider Referring Provider Show Balance by Patient 6	Exclude Sent Encounters	
	Ū.	
Search		
Select All Collection Agency Spreadsheet		1

# **FAQ - Collections**

- Question: What Transaction codes are used for posting Collections
- Answer:
  - IPC: Insurance Payment Collections
  - PPC: Patient Payment Collections
  - Patient • COLF: Collections Fee Encounter Post Date Transaction V Amount Adjustment 45173 Valen, Frankie 07/20/2016 IPC 20.00 45173 Valen, Frankie COLF 5.00 07/20/2016
- Question: Claim was billed to the wrong insurance and ultimately the balance went to collections New insurance info now arrives for the patient and the practice wants to send a claim but doesn't want to take it out of collections
- Answer:
  - Simply add the insurance to the encounter, update the profile to reflect the new insurance, but don't move the balance
  - Click "Print Claim" and choose the correct payer in the "Print Claims For" drop down box
  - To send electronically, change the claim to the 'READY0' Status to force the zero balance claim to be sent electronically

# Reports to manage Patient A/R, Pre-Collections, Collections

- Pre-Collections Worklist, found at the bottom of the Statements page
- Aging by Patient
- Interactive Aging filtered by 'PATIENT'

Question: What report can I run to see who is in Collections and what has been paid?

**Answer:** Collections Payment

or Payments and Adjustments > filtered for IPC, PPC, COLF

Question: What report can I run to see all accounts in Collection

Answer: 'Precollection/Collection' > filtered by 'In Collection'

	elect Type:	In Collection	
Output As: PDF Format			

Collection Payme	nts
Posted From:	
Posted To:	
Collection Agency:	(inc) P
Transaction Type 💯:	(inc)
Tot <u>a</u> ls Only:	•
Output As:	PDF Format
Orientation:	Portrait T
Font Size:	M
Cover Page:	
Footer Info:	•
	Run