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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?

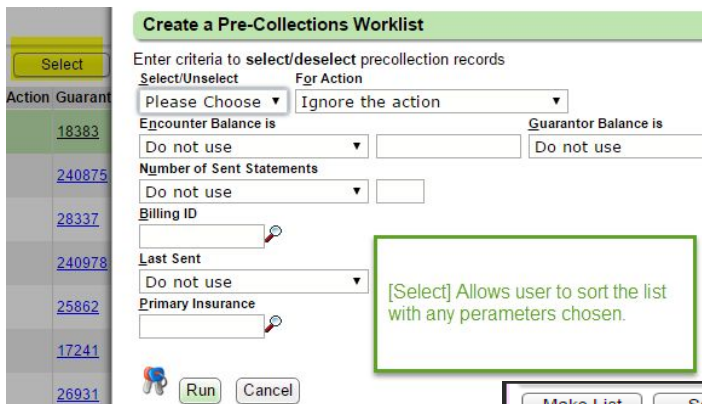
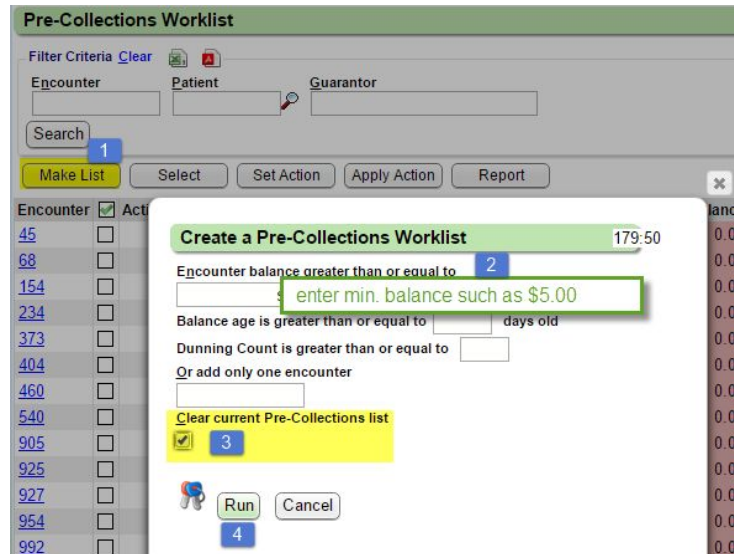
It depends, if *all* the encounters are in pre-collection, then the guarantor does *not* receive statements. If the Guarantor has *any other* encounters that are eligible to be billed on statements, then the encounters that are in pre-collections will also be included on the statement (since you are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

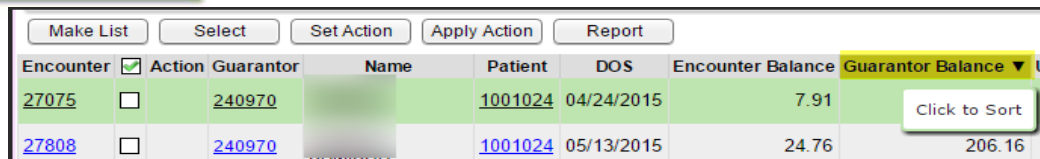
1. Click [Make List]
2. Enter Dunning Count, Minimum Balance, and/or any other criteria for the new list
3. Check 'Clear Current Pre-Collections List'
 - This step is optional, and can be used in situations where you are looking to simply start with a fresh list.
4. Click [Run]



Select

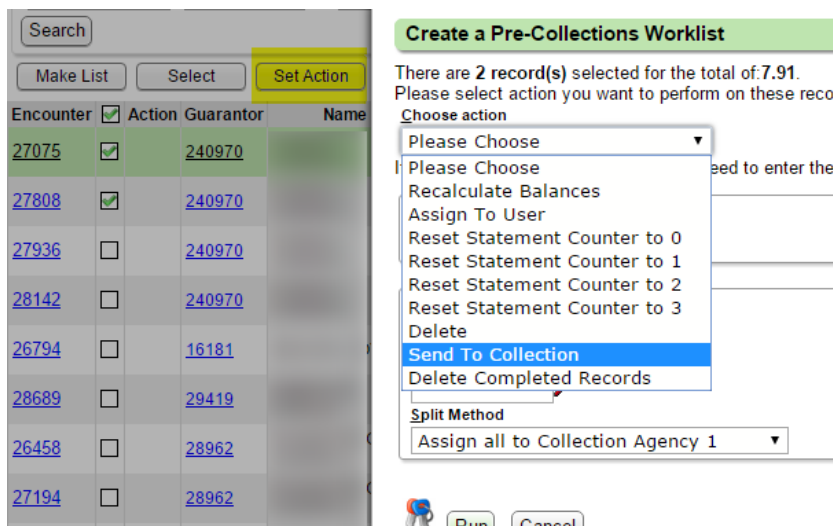
This is an optional function. You can use the filters to automatically select (check the boxes) of Encounters that match certain criteria. This is very useful if your list is very long.

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

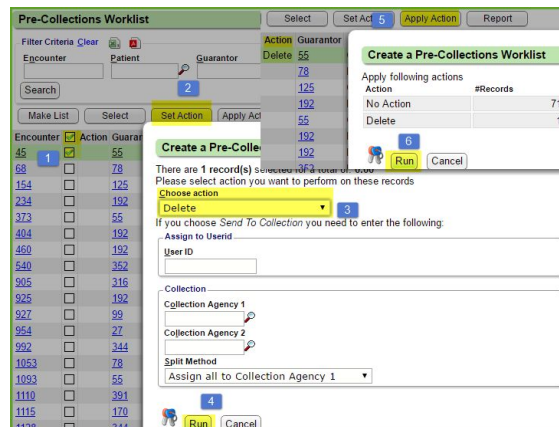
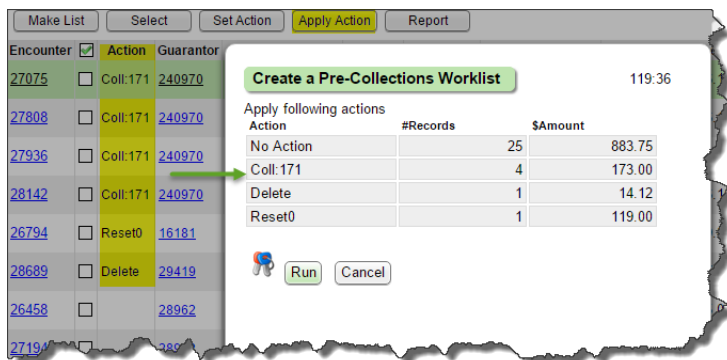


- Recalculate Balance: if the list is old it can be refreshed on a per encounter basis using this feature
- Reset Statement Counter: this refers to the Dunning Message Count - use this action to reset all checked encounters.
 - Delete: delete encounter from this list -See below
 - Send to Collections: in the screenshot below we have two Encounters we are sending to collection

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



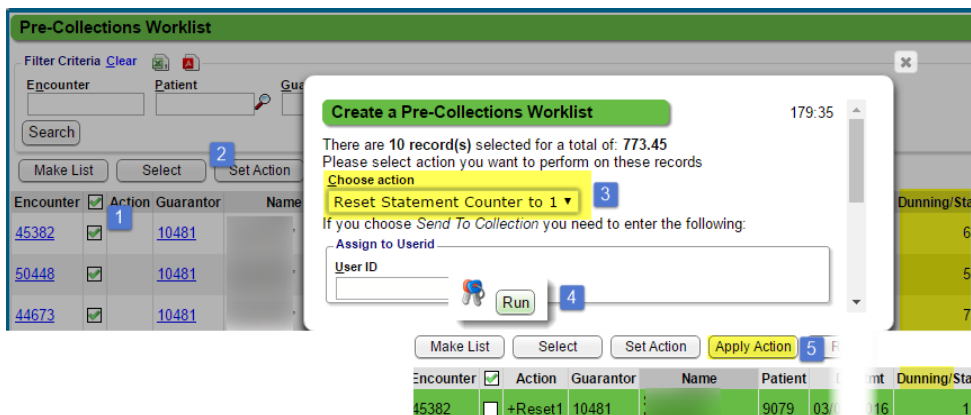
Use this to execute the actions you have 'Set' in the previous step. When you click the 'Apply Action' button, the system displays a summary of what Actions are going to be taken. Click 'Run'. The Encounters are then marked with the Action that was taken.

Report > used to report actions taken on this list

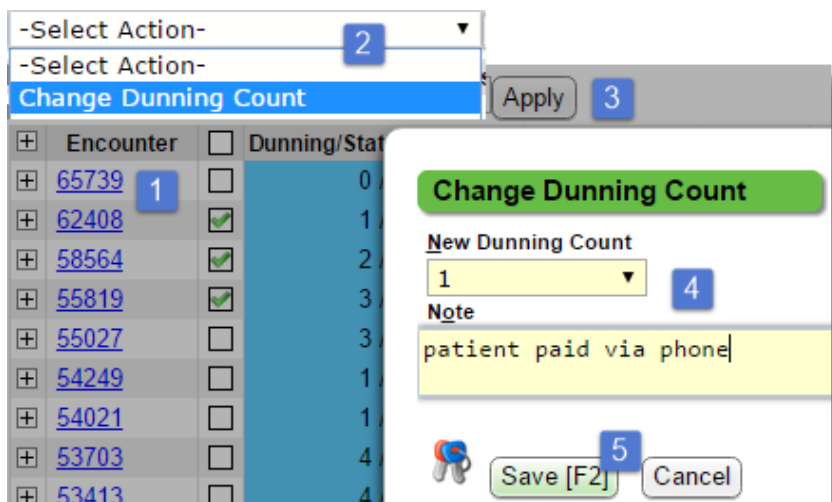
How to reset Dunning message count

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



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]

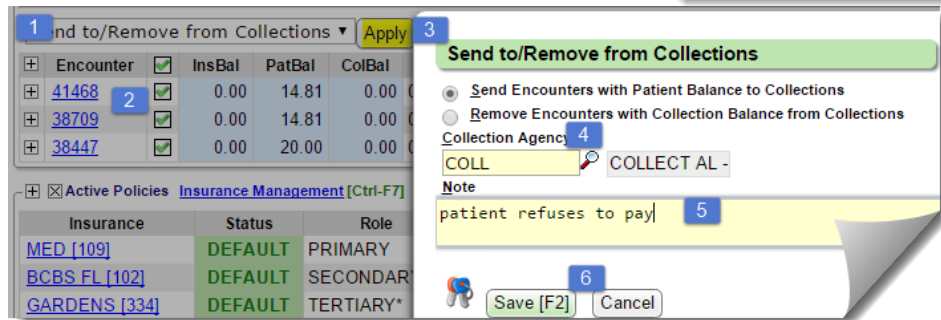
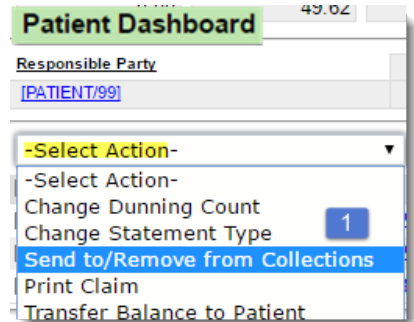
Collections

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]



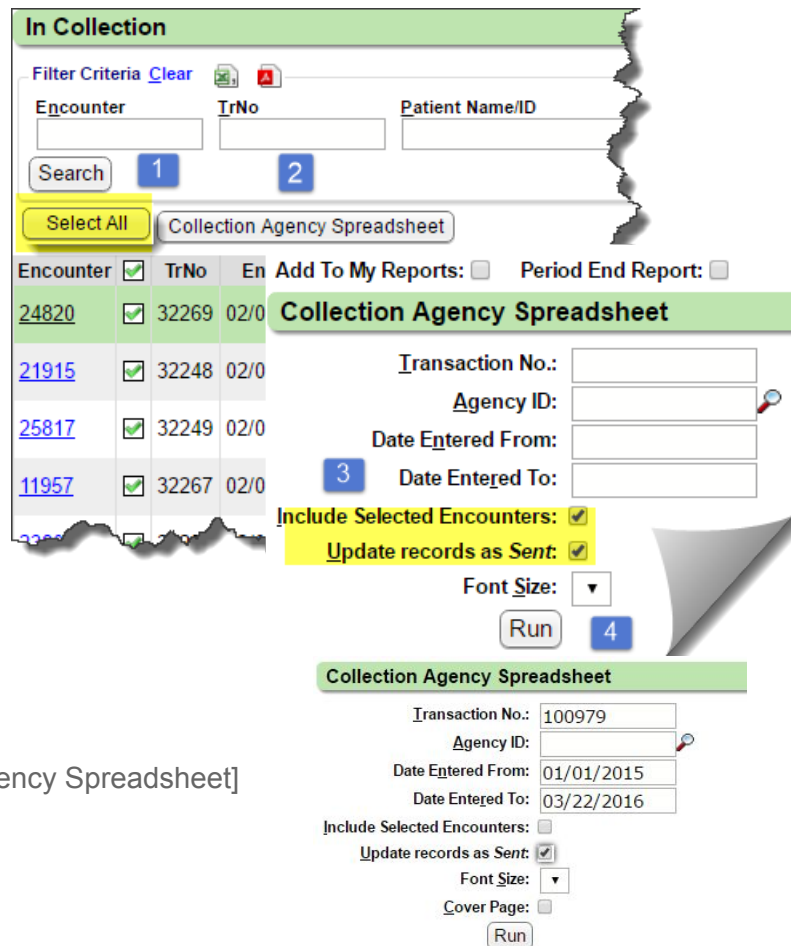
How to create a spreadsheet to upload to a Collection Agency? ...and update the records as 'Sent'

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 as a group 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]

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

FAQ - Collections

- **Question:** What Transaction codes are used for posting Collections
- **Answer:**
 - 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

- **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'