

The Special Accounts Editor (cfs)



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PRINTING INSTRUCTIONS: To print out copies of this document, browse to *The Special Accounts Editor (cfs)* (<http://learn.pcc.com/cfs.pdf>) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <support@pcc.com> or (800) 722-1082.

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1. Introduction

Use the Special Accounts Editor (**cfs**) to work with all accounts with certain status flags or other specific characteristics. For example, you may want to list all accounts that your office put on a budget plan, or all accounts that were flagged as "Cash Only" for writing a bad check. You can view and work with all of these types of accounts by using the **cfs** report.

cfs provides you with a list of patients with specific Account Status Flags or other account issues. You can then jump into different Partner programs directly from the list.

2. Running cfs and Selecting Criteria

You can run **cfs** from the "Patient/Account Reports" section of Partner. You can also type **cfs** from a command prompt.



There are two types of lists found in **cfs**:

- Standard lists that appear on all systems. These include accounts that are *Overdue*, on a *Budget Plan*, who have *Credits* or have *Bills Held* by a flag.
- Customized lists based on your office's Account Flags. These include all of the Account Status Flags in the Table Editor (**ted**). If you add a new account flag and assign it to specific accounts, you will be able to work with those accounts using a report option in **cfs**.

Tip: The lists stored in **cfs** are created overnight. Transactions posted through the day will not affect whether an account appears on a list or not. No matter what changes you make to an account, they will remain on a list until the lists are recreated in the evening.

3. Viewing the Report and Working With Accounts

Enter the letter or number next to a list and press **Enter** to view it. All accounts on the selected list, along with their balance information and phone number, will appear:

Page Up	F12		Page Down
ACCOUNT	CURRENT	Collection	120+(days)
HOME PHONE	WORK PHONE	30..59 60..89 90..119	LAST PAYMENT
1> Abbot, Mavaish	555-806-7779	555-539-4471	11/01/90
2> Abrams, Wranslee	555-148-7354	555-642-5304	04/09/99
3> Acevedo, Wykesius	555-574-0607	555-527-9103	none
4> Acosta, Marah	555-742-0580	555-574-0607	12/11/03
5> Adair, Maylla	\$ 25.00CR	555-296-9756	04/05/01
6> Adam, Mayra	555-635-3614	555-830-7017	12/05/86
7> Adams, Freddy	555-215-9859	555-296-9756	none
8> Adamson, McClain	555-522-4054	555-576-9853	02/20/91
9> Adams, Xandria	555-545-3485	555-102-1879	08/31/99
10> Adam, Wyshauna	555-582-3673	555-672-4981	11/04/98

Start of List	Jump to Letter	End of List	Remove Flag	Form Letters	Oops Account	View Account
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The example above shows all of the *Collection* accounts. Collection accounts are accounts that have been assigned the "Collection" flag on the status line in the Family Editor (**fame**).

As you view the list and work with each of the families, you can perform the following functions:

Actions in cfs

[F1 -- Start of List]

Press [F1] to jump to the top of the list.

[F2 -- Jump to Letter]

Press [F2] and input a letter to jump to a spot somewhere in the alphabetical list of accounts.

[F3 -- End of List]

Press **[F3]** to jump to the bottom of the list.

[F4 -- Remove Flag]

Press **[F4]** to remove the status flag (such as the "Collections" flag) that causes the account to appear on this list. Remember that the account will remain on the list until **cfs** rebuilds its lists overnight.

[F6 -- Form Letters]

Press **[F6]** to select and print a form letter for any account on the list.

[F7 -- Oops Account]

Press **[F7]** to run the Correct Mistakes (**oops**) program for any account on the list. In **oops**, you can view billing history, change insurance pending status, and rebatch or print outstanding claims.

[F8 -- View Account]

Press **[F8]** to run the Family Editor (**fame**) program for any account on the list. In **fame**, you can view a detailed family history, run the Collection report (**coll**) to review outstanding charges, add notes to the account, review insurance information, and more.

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