

The Collection Report (coll)



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PRINTING INSTRUCTIONS: To print out copies of this document, browse to *The Collection Report (coll)* (<http://learn.pcc.com/coll.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. Understanding Balances Using the Collection Report (coll)

The **coll** report can help you understand and explain an individual account's current balance and recent payment history. If a family does not understand why they owe money, run **coll**. It can also help you determine whether or not an account has been making regular payments against their outstanding balance.

This program examines an account and then reports:

- Account Aging
- Outstanding Charges
- Recent Personal Payments
- Demographic Information

The report can be sent to the screen, printer, or to your email box.

2. Running coll and Selecting Criteria

You can run **coll** for a particular account by pressing **F3** *Collection Report* while in the Family Editor (**fame**) for that account.

You can also access **coll** from a command prompt by typing **coll** and then pressing **Enter**.

If you start **coll** from a command prompt, you will be asked to select an account to report on, and then **coll** will display the criteria selection screen. If you start it from within **fame**, then it already knows which account to report on and therefore displays the criteria screen immediately.

The Collection Report (coll)

Page Up	F12	Page Down
Acct#: 1051	The Collection Screen (coll)	Page 1 of 1
First: John		Home Phone: 800-722-1082
Last: Doe		Father Wk#: 800-722-7708
		Mother Wk#: _____
Addr1: Physician's Computer Company		Cell/Beeper#: _____
Addr2: 1 Main St., Suite 7		
City: Winooski		
State: VT	Zip Code: 05404	
Status: _____		
Destination		Include on the report
<input checked="" type="checkbox"/> Screen		<input checked="" type="checkbox"/> Account Aging
<input type="checkbox"/> Mailbox		<input checked="" type="checkbox"/> Outstanding Charges
<input type="checkbox"/> Printer: _____		<input checked="" type="checkbox"/> Personal Payments
<input type="checkbox"/> Interactive Screen		<input checked="" type="checkbox"/> Demographic Information
Date Range of Payments to Show: 06/16/03 to 06/15/04		
Process Report		

On the criteria screen, you can make selections to change the report output. You can determine whether you want the output on your screen, in your e-mail box, printed out, or used interactively on the screen. You can also choose to include only certain sections of the report using the "Include on the Report" checkboxes shown. Finally, since the report can show you all recent personal payments, you can change the date range of payments the report will display.

Press [F1 -- Process Report] to create the report.

3. Reading the coll Report Output

The standard coll report contains the sections shown below.

```

ACCOUNT INFORMATION:
-----
Sean Amoroso
4A Spruance Way
Townsend, VT 05359
Alt Phone: 802-995-8411
Status:

Home Phone: 802-498-7773
Work Phone: 802-786-2185
Temp Phone: 802-557-6608

Date of most recent
Visit/Service: 11/18/00
Personal Bill Sent:
Personal Payment: 11/09/00
Insurance Payment: 11/01/00

Hold Bill Till:
Budget Amount: $ 0.00
PCC# 5350
    
```

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AGING SUMMARIES:	CURRENT	OD30	OD60	OD90	OD120	TOTAL

BY PAYOR RESP DATE:						
Personal	0.00	0.00	0.00	0.00	65.00	65.00
Medicaid	0.00	0.00	0.00	0.00	203.00	203.00
BY TRANS DATE:						
Personal	0.00	0.00	0.00	0.00	65.00	65.00
Medicaid	0.00	0.00	0.00	0.00	203.00	203.00

OUTSTANDING CHARGES:		DIAG	PROV	AMOUNT	PERS DUE	INS DUE

01/15/00 Amoroso, Harrison						
OV Highly Compreh		V20.2	Nurs	125.00	65.00	0.00
11/05/00 Amoroso, Michael						
Urine Culture		599.0	DoLi	18.00	0.00	18.00
OV Expanded Focus		599.0	DoLi	60.00	0.00	60.00
11/11/00 Amoroso, Robinson						
Physical 12-17 yrs		V20.2	Trap	125.00	0.00	125.00
					-----	-----
TOTAL AMOUNT DUE					65.00	203.00

RECENT PERSONAL PAYMENTS:	CK NUMBER	AMOUNT

11/09/00 TOS Cash		20.00
07/27/00 TOS Cash		40.00

YEAR-TO-DATE SUMMARY:

YTD Charges: \$ 0.00
YTD Insurance Payments: \$ 90.00
YTD Medicaid Payments: \$ 794.15
YTD Personal Payments: \$ 60.00
YTD Total Adjustments: \$ 345.85

The complete **coll** report has four sections: Account Aging, Outstanding Charges, Recent Personal Payments and Demographic Information. You can include any or all of these sections. To include a section, make sure that it is marked with an 'X' on the criteria screen before you generate the report.

- **Account Info:** The first section contains simple demographic information, including the account name, address and phone numbers, as well as some key dates (date of last visit, last bill sent, last personal payment made, and last insurance payment made.) If you use the "Hold Bill Till" and "Budget Amount" functions of the Family Editor (**fame**), you will see information about those settings in this section of the report.

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The Account Info section of **coll** is customizable. If you need to format your **coll** report to suite the needs of your practice, contact PCC for help creating a custom header.

- **Aging Summaries:** The **coll** report shows you two different ways of aging an account's outstanding personal charges. Balances are first aged by Payor Responsibility Date, and then by Transaction Date. Payor Responsibility is different in that it will age items based on when the amount became personal, instead of aging strictly from the date of service. Within each category, amounts are shown for balances that are overdue 30, 60, 90, and 120 days.
- **Outstanding Charges:** The report contains a list of currently unpaid, personal charges. This section makes it especially easy to explain an account's balance to someone over the phone. It contains the patient's name, the diagnoses and procedures of the visit, and three columns to indicate how much was originally charged, how much is due to the personal account, and how much is still pending an insurance company.
- **Recent Payments.** The report shows a summary of recent personal payments. Use this information to see whether or not an account has been making regular payments. Accounts that are working to pay off an old balance should be making regular payments.
- **Year-To-Date Summary.** The last section contains a year-to-date summary for charges and payments.