

The Personal Money Tracking Assistant (persview)



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PRINTING INSTRUCTIONS: To print out copies of this document, browse to *The Personal Money Tracking Assistant (persview)* (<http://learn.pcc.com/persview.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: Working Personal Accounts with persview

The Personal Money Tracking Assistant, or **persview**, is a powerful Partner tool. It is designed to help your practice manage your personal accounts receivable. **persview** creates an interactive list of accounts with personal balances. The list can contain all outstanding accounts or just a portion, depending on the criteria you enter when you first run the program.

If you have a dedicated personal biller, they should use **persview** every day when working down unpaid balances. By specifying different criteria, a user can focus on a certain portion of your practice's personal A/R. For example, some offices split up overdue accounts by last name, while others work on the accounts based on the age or amount of the balance. Regardless of how your office works, **persview** can help you hone in on the accounts you need to contact.

The report's results can be printed or saved in your e-mail box, but the real power of **persview** comes from working with the list on your screen. By pressing different function keys, you can send out form letters, review account histories, generate bills, enter notes, post payments, post late fees, and even write off bad debt... all from the same interface.

2. Running persview and Selecting Criteria

You can find **persview** in the Personal Billing section of the Billing Functions window in Partner. You can also run it by typing **persview** at a command prompt.

When you first run **persview**, you are presented with a criteria screen:

The screenshot shows the 'PERSONAL MONEY TRACKING ASSISTANT' criteria screen. It is divided into several sections for user input:

- Aged How?**: Includes checkboxes for 'Transaction Date' (checked), 'Posting Date', and 'Payor Date'.
- Aged as of what date?**: Includes 'Use Nightly File for 03/29/05' (checked), 'Use Existing File for 00/00/00 (from 00/00/00)', and 'Regenerate as of: 07/06/05'.
- Personal Balance Range to Include:**: A range from '\$ 0.00' to '\$99999.99'.
- How to Sort the List**: Includes 'Account Name' (checked) and 'Total Personal Amount'.
- Which Accounts to Include**: Includes 'Review Name Range: A - Z' and a list of account types with checkboxes: 'Accounts with Current Balances' (checked), 'Accounts with 30 Day Balances' (checked), 'Accounts with 60 Day Balances' (checked), 'Accounts with 90 Day Balances' (checked), 'Accounts with 120+ Day Balances' (checked), and 'Exclude by Account Flag' (unchecked).
- Destination**: Includes 'Screen' (checked), 'Mailbox', and 'Printer:'.

At the bottom, there is a 'Generate Report' button and several other function key buttons.

Press **[F1 -- Generate Report]** to view a list of all accounts with personal balances. Skip to the next section, *Working With Individual Accounts* to learn how to use the report.

Before you press **[F1]**, however, you can use the criteria options on the screen to limit which accounts will appear.

Criteria Options in persview

- *Aged How*

You can choose how outstanding charges should be aged. Account totals appear in aging categories on the report, and they can be aged by transaction date (when the service occurred), by posting date (when the service was entered onto the system), or by payor date (the date the balance became the account's responsibility).

- *Aged as of..*

Select a date to base the report on. Use the last "Nightly File" for a quick report, as the aging data is automatically prepared the previous night. Use the Existing File to quickly review the last report you manually aged. Or, ask **persview** to manually regenerate to a particular date. In most situations, you should stick with the Nightly File. If you have just finished entering dozens of payments, you may want to "Regenerate" the aging information for today.

- *Personal Balance Range*

You may not want to work with an account unless they owe over ten dollars. If you only want to list accounts that have a certain balance, enter a dollar amount range in the fields provided.

- *Name Range*

The Name Range question allows you to select a specific range of the alphabet. Enter the starting and ending letters of your alphabet range in place of the A and Z. Use this option if your office's billers divide their responsibilities by account last names.

- *Which Accounts to Include*

By default, all of the categories shown are selected. If you wish to limit the accounts based on how long they have owed you money, you can remove or add X's in front of each category. The "Exclude by Account Flag" option can be useful if you don't wish to view certain account types.

- *How to Sort the List*

You can sort the printed report or **persview's** interactive on-screen report in alphabetical order or by the total balance owed by the account. To indicate your selection, place an X in front of one of the two choices. You may find it useful to sort accounts by who owes you the most.

- *Destination*

Finally, you must decide where to send the report output. To indicate your selection, just place an X in front of your choice.

- If you specify the "Screen" as your destination, the results will appear on your computer screen in an interactive report. You will be able to scroll through the list and easily access information about the various accounts that are listed. It is also easy to generate a form letter or bill for some or all of the accounts. See below for more information.

- If you send the output to your "Mailbox", you will receive an e-mail that you can review at a later time. You can also save the e-mail in a folder for archival purposes.
- If you opt to print the report, it will be printed on your default Partner printer unless you enter the name of a different printer. Enter an asterisk (*) to view and select from a list of available printers.

While printing or sending the list as an e-mail may be useful, you will find the interactive list (Screen) the most powerful choice. The remaining sections in this chapter explain how to take full advantage of the "Screen" option.

After making your criteria selections, press [F1 -- *Generate Report*] to run the report. **persview** may take a few minutes to gather the information about accounts with personal balances.

3. Working with Individual Accounts

The first screen that appears when you send **persview** to the screen looks like this:

Page Up		F12				Page Down	
WORKING WITH *INDIVIDUAL* ACCOUNTS							
Name	Current	30..59	60..89	90..119	120+	Total	
<input checked="" type="checkbox"/> Rickman, Karlee	\$ 0.00	\$ 0.00	\$ 0.00	\$ 270.00	\$ 806.00	\$1076.00	
<input type="checkbox"/> Chambers, Raushan	\$ 0.00	\$ 50.97	\$ 0.00	\$1017.14	\$ 0.00	\$1068.11	
<input type="checkbox"/> Ganey, Tajh	\$ 91.00	\$ 0.00	\$ 127.00	\$ 101.00	\$ 610.65	\$ 929.65	
<input type="checkbox"/> Hairston, Teryl	\$ 268.00	\$ 177.00	\$ 181.00	\$ 281.00	\$ 0.00	\$ 907.00	
<input type="checkbox"/> Alanis, Marguita	\$ 0.00	\$ 0.00	\$ 64.00	\$ 0.00	\$ 840.00	\$ 904.00	
<input type="checkbox"/> Gear, Tamaya	\$ 0.00	\$ 240.00	\$ 505.00	\$ 0.00	\$ 0.00	\$ 745.00	
<input type="checkbox"/> Hursey, Tomi	\$ 101.00	\$ 320.00	\$ 322.50	\$ 0.00	\$ 0.00	\$ 743.50	
<input type="checkbox"/> Gordon, Denna	\$ 0.00	\$ 50.00	\$ 50.00	\$ 25.00	\$ 612.25	\$ 737.25	
<input type="checkbox"/> Burnes, Annette	\$ 0.00	\$ 0.00	\$ 127.00	\$ 496.40	\$ 113.60	\$ 737.00	
<input type="checkbox"/> Blaxton, Mordecai	\$ 39.00	\$ 0.00	\$ 69.00	\$ 0.00	\$ 611.99	\$ 719.99	
<input type="checkbox"/> Galvanromero, Tai	\$ 0.00	\$ 20.00	\$ 342.50	\$ 20.00	\$ 329.74	\$ 712.24	
<input type="checkbox"/> Eldridge, Charlott	\$ 0.00	\$ 64.00	\$ 0.00	\$ 0.00	\$ 620.50	\$ 684.50	
<input type="checkbox"/> Raymond, Keela	\$ 0.00	\$ 0.00	\$ 30.00	\$ 33.00	\$ 598.73	\$ 661.73	
<input type="checkbox"/> Gilmer, Tanika	\$ 101.00	\$ 165.00	\$ 370.00	\$ 0.00	\$ 0.00	\$ 636.00	
<input type="checkbox"/> Wethal, Lorena	\$ 0.00	\$ 606.25	\$ 0.00	\$ 0.00	\$ 0.00	\$ 606.25	
<input type="checkbox"/> Fulford, Shaykeria	\$ 0.00	\$ 0.00	\$ 30.00	\$ 0.00	\$ 570.00	\$ 600.00	
<input type="checkbox"/> Burke, Annah	\$ 0.00	\$ 0.00	\$ 124.00	\$ 0.00	\$ 468.20	\$ 592.20	
<input type="checkbox"/> Moody, Quantrell	\$ 0.00	\$ 0.00	\$ 0.00	\$ 15.00	\$ 546.40	\$ 561.40	
<input type="checkbox"/> Palacio, Jessae	\$ 320.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 228.50	\$ 548.50	

Main Menu	Edit Account	Refund	Pam	Daysheet History	Form Letters	Print One Bill	Work With All
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persview presents a list of accounts and their aged balances. The accounts are grouped in sets of three, making the list easier to read. In the example shown, the user sorted the list by "Total Personal Amount" owed. The most urgent account problems are at the top of the screen. Press **Page Down** and **Page Up** to scroll through the list and view all accounts.

The screen allows you to work with a specific account. Select an account by placing an **X** in the box in front of the account name. Once you have selected an account, you can do a variety of different operations by pressing different function keys. For example, press [F2 -- *Edit Account*] to run the Family Editor (**fame**) for the selected account. From **fame** you can check the account's insurance companies and run the **coll** report to review the reasons for the balance.

Actions From the Individual Account Screen

[F1 -- Main Menu]

Press **[F1]** to return to the Main Menu, where you can enter a different set of criteria.

[F2 -- Edit Account]

Press **[F2]** to access **fame** for the selected account. In **fame** you can review demographic information, run the collection report, view a complete account history, review insurance information, enter account notes, and more.

[F3 -- Refund]

Press **[F3]** to run **refund** for the selected account. In **refund** you can quickly refund a credit, print a bill, and post late charges and other fees.

[F4 -- Pam]

Press **[F4]** to post payments or adjustments in **pam**. This is useful when the selected account agrees to pay with a credit card over the phone. You can also write off debt by using an appropriate payment type.

[F5 -- Daysheet History]

Press **[F5]** to scan through the daysheets and view all transactions related to the selected account. If you suspect a payment or charge has been deleted, the daysheet history can show you the amount and which user deleted it.

[F6 -- Form Letters]

Press **[F6]** to print one or more form letters for the selected account.

[F7 -- Print One Bill]

Press **[F7]** to print a bill for the selected account. When you press this function key, you will be asked to enter a date range for the bill.

[F8 -- Work With All]

Press **[F8]** to switch to working with all accounts listed. See the section below for more information.

4. Working with All Accounts

When you press **[F8 -- Work With All]**, **persview** shows you new function keys for performing batch functions on all listed accounts:

Page Up		F12				Page Down	
WORKING WITH *ALL* ACCOUNTS							
Name	Current	30..59	60..89	90..119	120+	Total	
x Rickman, Karlee	\$ 0.00	\$ 0.00	\$ 0.00	\$ 270.00	\$ 806.00	\$1076.00	
Chambers, Raushan	\$ 0.00	\$ 50.97	\$ 0.00	\$1017.14	\$ 0.00	\$1068.11	
Ganey, Tajh	\$ 91.00	\$ 0.00	\$ 127.00	\$ 101.00	\$ 610.65	\$ 929.65	
Hairston, Teryl	\$ 268.00	\$ 177.00	\$ 181.00	\$ 281.00	\$ 0.00	\$ 907.00	
Alanis, Marguita	\$ 0.00	\$ 0.00	\$ 64.00	\$ 0.00	\$ 840.00	\$ 904.00	
Gear, Tamaya	\$ 0.00	\$ 240.00	\$ 505.00	\$ 0.00	\$ 0.00	\$ 745.00	
Hursey, Tomi	\$ 101.00	\$ 320.00	\$ 322.50	\$ 0.00	\$ 0.00	\$ 743.50	
Gordon, Denna	\$ 0.00	\$ 50.00	\$ 50.00	\$ 25.00	\$ 612.25	\$ 737.25	
Burnes, Annette	\$ 0.00	\$ 0.00	\$ 127.00	\$ 496.40	\$ 113.60	\$ 737.00	
Blaxton, Mordecai	\$ 39.00	\$ 0.00	\$ 69.00	\$ 0.00	\$ 611.99	\$ 719.99	
Galvanromero, Tai	\$ 0.00	\$ 20.00	\$ 342.50	\$ 20.00	\$ 329.74	\$ 712.24	
Eldridge, Charlott	\$ 0.00	\$ 64.00	\$ 0.00	\$ 0.00	\$ 620.50	\$ 684.50	
Raymond, Keela	\$ 0.00	\$ 0.00	\$ 30.00	\$ 33.00	\$ 598.73	\$ 661.73	
Gilmer, Tanika	\$ 101.00	\$ 165.00	\$ 370.00	\$ 0.00	\$ 0.00	\$ 636.00	
Wethal, Lorena	\$ 0.00	\$ 606.25	\$ 0.00	\$ 0.00	\$ 0.00	\$ 606.25	
Fulford, Shaykeria	\$ 0.00	\$ 0.00	\$ 30.00	\$ 0.00	\$ 570.00	\$ 600.00	
Burke, Annah	\$ 0.00	\$ 0.00	\$ 124.00	\$ 0.00	\$ 468.20	\$ 592.20	
Moody, Quantrell	\$ 0.00	\$ 0.00	\$ 0.00	\$ 15.00	\$ 546.40	\$ 561.40	
Palacio, Jessae	\$ 320.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 228.50	\$ 548.50	
Main Menu				Form Letters	Print Bills	See Totals	

The new function keys will perform actions upon all the accounts in the list.

Actions for All Accounts

[F1 -- Main Menu]

Press [F1] to return to the Main Menu, where you can enter a different set of criteria.

[F6 -- Form Letters]

Press [F6] to select one or more form letters and print them for *every account* in the list. By using **persview's** criteria options and this function, you could generate a form letter for all accounts with specific overdue balances amounts or a specific account flag.

[F7 -- Print Bills]

Press [F7] to print bills for all accounts on the list. You will be prompted for a date range.

[F8 -- See Totals]

Press [F8] to view the Personal Totals screen, described below.

5. The Personal Totals Screen

Press [F8 -- See Totals] from the "Working With All" screen to view a summary for the accounts in the report:



When you press **F8**, **persview** tallies up the personal money owed to your practice by everyone on the list. It then presents the totals to you, broken down by the age of the balance.

As long as you run the reports with similar criteria (same alphabet range, same aging categories, same aging types, etc) the the totals on this **persview** screen should match those from the **aging** and **insaging** reports.

Press [**F8** -- *Work With One*] to cycle back to the other **persview** screens.

6. Conclusion

persview is designed to make it easier for your staff to manage all accounts that have personal balances. It is the perfect home base for people following up on old bills. Use **persview**'s customizable, interactive lists to work down your personal A/R.