Personal Collections

Lynne Y Gratton, CPPM
PCC 2016 Users' Conference
Personal Collections

Overview

- Take Away
- Collecting at the front desk
- Statements
- Posting payments
- Follow up
- Collections
- Reports
Personal Collections

● What is the Take Away?
  - Learning the importance of the front desk and back office working together to collect money.
  - Tools to help
Personal Collections  
Pre-Visit

The processes used prior to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

In short the Front End functions drive the revenue cycle.
Personal Collections
Pre-Visit

- Scheduling
- Appointment Verification
- Billing Department Prep
**Personal Collections**

**Pre-Visit: Scheduling**

- **Name:** Pebbles Flintstone
- **Visit Reason:**
- **PCP:** W
- **Provider:**
- **Time Frame:**

**PATIENT:** Pebbles Flintstone  
**PAT STATUS:** $$$ Problem, Adoption  
**CUST STATUS:** CONFIDENTIAL  
**GUAR STATUS:** Billing Problem  
**GUAR:** Fred Flintstone  
1400 Rock Road  
Winooski, VT  05404

- **H:** 802-555-0105  
- **W:** 802-555-0146
- **PERS BAL:** $ 37.00  
- **INS BAL:** $ 128.00

- **PRI:** Aetna HDHP  
- **SEC:** Cigna PPO $20  
- **CERT:** 34DFJH  
- **CERT:** 2458JD  
- **GRP:**  
- **SSN:** 598-74-6104  
- **Chart #:** 2755

**MISS:** 1 (12/18/12, Pebbles, Sick Call)  
**CANC:** 1 (02/11/07, Pebbles, Sick Call)

- **Schedule**  
- **Inquire**  
- **Find**  
- **Next Relation**  
- **Demo-graphics**  
- **Clear**

*Use flags to communicate with the front*

*Take advantage of available function keys*
Personal Collections
Pre-Visit: elig

- Partner's elig program
  - Use notes for the front desk to see at checkin
    - Self pay → TOS discount
    - Verify no new insurance
Personal Collections
Pre-Visit: Appointment Verification

- Points to make during appointment verification
  - Verify date, time, and visit reason
  - Remind the patient
    - payment for expected copay & outstanding balances!!!
Personal Collections
Pre-Visit: Financial Policy

- Develop a financial policy you share with parents.
- Develop guides to educate patients about guarantor responsibility for personal balances.
- Consider keeping credit cards on file and making this part of your financial policy.
Personal Collections
Pre-Visit: Posting Personal Charges

- checkout screens
  - Setup using Charge Screen Editor (csedit)
    - Or work with your Client Advocate
  - Setup form fee posting for the front desk
Personal Collections
Pre-Visit: Self Pay Configuration

- Fake Insurance Self Pay
  - Allows the posting charges program to automatically post a self pay adjustment
  - Discuss pros and cons
Personal Collections
Personal Statements

- Personal statements
  - ebills vs bills
  - Cycle billing
  - Billing messages
  - Finding bills sent in the past
Personal Collections
Personal Statements

**ebill** vs **bills**

- Look more professional
- Submit electronically
- Cost per bill
  - $0.79366 first page
  - $0.2235 each addt'l page
- Plain printing, nothing fancy
- Print in your office
- Folding, stuffing, stamping, and time costs
- More control

PCC
Pediatric EHR Solutions

Control Your Future™
Account billing notes and billing messages appear below the aging section.

Budget amount appears here if set in fame.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description of Services</th>
<th>Charges</th>
<th>Payments</th>
<th>Ins Due</th>
<th>Patient Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/24/02</td>
<td>Maggie Simpson (Office)</td>
<td>$85.00</td>
<td>$50.00</td>
<td>$0.00</td>
<td>$35.00</td>
</tr>
<tr>
<td>10/24/02</td>
<td>Maggie Simpson (Office)</td>
<td>$48.00</td>
<td>$20.00</td>
<td>$0.00</td>
<td>$28.00</td>
</tr>
<tr>
<td>10/24/02</td>
<td>Maggie Simpson (Office)</td>
<td>$60.00</td>
<td>$30.00</td>
<td>$0.00</td>
<td>$30.00</td>
</tr>
</tbody>
</table>

Last Service: Jan 5, 2013
Last Bill Sent: Jan 21, 2013
Last Pers Pmt: Jan 5, 2013
Last Ins Pmt: Jan 20, 2013
Hold Bill Till:
Budget Amt: $93.00

Controls
- Total
- Total
- Total
- Total
- Total
- Total
- Total
- Total
- Total
- Total
- Total
Personal Collections
Personal Statements

- Sending out bills weekly instead of monthly
  - Personal payments come in all month

- Manual cycles
  - Breaking up bills
Personal Collections
Personal Statements

- Partner Cycle Billing
  - Set your cycle to 28 days
  - Run bills weekly
  - When does an account get a bill?
Personal Collections
Personal Statements

- Billing Messages
  - Available in ebills and bills, <F6>
  - By billing aging category

Please choose which billing message you would like to work with:

A) The default message (used when one of the others does not exist)
1) The Normal Bills message
2) The Overdue 30 Day Bills message
3) The Overdue 60 Day Bills message
4) The Overdue 90 Day Bills message
5) The Overdue 120 Day Bills message
Personal Collections
Personal Statements

- Account Billing Notes
  - Available in the Family Editor (fame)

<table>
<thead>
<tr>
<th>Acct PCC: 1</th>
<th>The Family Editor</th>
<th>Account Billing Note: John Canning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Pattern:</td>
<td>Search on whole words: No</td>
<td></td>
</tr>
<tr>
<td>04/16/12 Please remember to pay a minimum of your payment plan amount. Thank you!</td>
<td>- 02:26 pm lynne (Modified)</td>
<td></td>
</tr>
</tbody>
</table>

Use eis to track which accounts have account billing notes
Personal Collections

Bills: Work with Accounts

New with Release 7.3

- Review accounts before printing or submitting bills!
Function keys allow you to make changes to the account

Review each bill, then regenerate
Personal Collections
billlog

- Researching previously sent bills
  - billlog
  - aka F8 in bills / ebills
# Personal Collections

## Bill Log - Bill Batch Listing

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Date Range</th>
<th>Zip Range</th>
<th>Alphabet Range</th>
<th>Bill Agings</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/20/13</td>
<td>lynne</td>
<td>04/01/03-05/19/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>05/13/13</td>
<td>randy</td>
<td>04/01/03-05/12/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>05/06/13</td>
<td>lynne</td>
<td>04/01/03-05/13/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>04/29/13</td>
<td>erica</td>
<td>04/01/03-04/28/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>04/22/13</td>
<td>lynne</td>
<td>04/01/03-04/21/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>04/15/13</td>
<td>erica</td>
<td>04/01/03-04/14/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>04/08/13</td>
<td>lynne</td>
<td>04/01/03-04/07/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>03/25/13</td>
<td>amanda</td>
<td>04/01/03-03/24/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>03/20/13</td>
<td>erica</td>
<td>04/01/03-03/19/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>03/11/13</td>
<td>lynne</td>
<td>04/01/03-03/10/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>03/04/13</td>
<td>randy</td>
<td>04/01/03-03/03/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>02/25/13</td>
<td>amanda</td>
<td>04/01/03-02/24/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>02/18/13</td>
<td>lynne</td>
<td>04/01/03-02/17/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>02/11/13</td>
<td>amanda</td>
<td>04/01/03-02/10/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>02/04/13</td>
<td>erica</td>
<td>04/01/03-02/03/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>01/28/13</td>
<td>lynne</td>
<td>04/01/03-01/27/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>01/21/13</td>
<td>lynne</td>
<td>04/01/03-01/20/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>01/14/13</td>
<td>lynne</td>
<td>04/01/03-01/13/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
<tr>
<td>01/07/13</td>
<td>randy</td>
<td>04/01/03-01/06/13</td>
<td>00000-99999</td>
<td>a-z</td>
<td>0,30,60,90,120</td>
</tr>
</tbody>
</table>

**Accounts Billed**

**Accounts NotBilled**

---

**PCC**

Pediatric EHR Solutions

Control Your Future™
Personal Collections
billlog

- Accounts Billed
  - See who received a bill
  - Includes the bill amount
  - View the actual bill sent using F1
Personal Collections

billlog

- Accounts Not Billed
  - See who did not receive a bill
  - Includes why they did not receive one

<table>
<thead>
<tr>
<th>Account, Test</th>
<th>(#100000)</th>
<th>Total bal $ 0.00</th>
<th>is not billable.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acker, Patricia</td>
<td>(#28)</td>
<td>Total bal $ 0.00</td>
<td>is not billable.</td>
</tr>
<tr>
<td>Adams, Ambrocio</td>
<td>(#1962)</td>
<td>Total bal $ 0.00</td>
<td>is not billable.</td>
</tr>
<tr>
<td>Beltz, Christopher</td>
<td>(#671)</td>
<td>Total bal $ 26.81CR is not billable.</td>
<td></td>
</tr>
<tr>
<td>Catalani, John</td>
<td>(#1092)</td>
<td>Flag #4 held bill.</td>
<td></td>
</tr>
</tbody>
</table>
**Personal Collections**  
**Personal Payments**

**POSTING PERSONAL PAYMENTS**

<table>
<thead>
<tr>
<th>First Name:</th>
<th>John</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name:</td>
<td>Canning</td>
</tr>
<tr>
<td>Status:</td>
<td>Payment Plan</td>
</tr>
<tr>
<td>Address:</td>
<td>584 Water Street</td>
</tr>
<tr>
<td>City:</td>
<td>Irasburg</td>
</tr>
<tr>
<td>State:</td>
<td>VT</td>
</tr>
<tr>
<td>Zip Code:</td>
<td>05845</td>
</tr>
</tbody>
</table>

**AGING:**

<table>
<thead>
<tr>
<th></th>
<th>0-30</th>
<th>31-60</th>
<th>61-90</th>
<th>Older 90</th>
<th>Old Bal</th>
<th>New Bal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$30.00</td>
<td>$30.00</td>
<td>$30.00</td>
</tr>
<tr>
<td>Insurance</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$457.00</td>
<td>$457.00</td>
<td>$457.00</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Date:** 07/15/13  
**Payment/Adjustment Type:** Personal Check Payment  
**Amount:** $30.00  
**Check #:** 1234

*Print receipt for this payment*

**Options:**  
- Save  
- Next Account  
- Post A Refund  
- Link Payments  
- Print A Bill  
- Correct Mistakes  
- Family Editor  
- Acct History
**Personal Collections**

*persview*

---

**Use your bills cut off balance.**

**Focus on one aged account at a time.**

**You may wish to exclude/include by account flag.**

---

**Personal Money Tracking Assistant**

**Aged How?**
- Transaction Date
- Posting Date
- Payor Date

**Aged as of what date?**
- Use Nightly File for 02/12/13
- Use Existing File for 00/00/00 (from 00/00/00)
- Regenerate as of: 05/23/13

**Personal Balance Range to Include:**
- $4.99 - $99999.99

**How to Sort the List?**
- Account Name
- Total Personal Aged

**Which Accounts to Include**
- Accounts with Current Balances
- Accounts with 30 Day Balances
- Accounts with 60 Day Balances
- Accounts with 90 Day Balances
- Accounts with 120+ Day Balances
- Exclude by Account Flag
  - Include if any Account Flag matches
  - Include if all Account Flags match

---

PCC
Pediatric EHR Solutions

Control Your Future™
### Personal Collections

**persview**

#### WORKING WITH *INDIVIDUAL* ACCOUNTS

<table>
<thead>
<tr>
<th>Name</th>
<th>Current</th>
<th>30..59</th>
<th>60..89</th>
<th>90..119</th>
<th>120+</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achey, Jeremy</td>
<td>$ 56.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 56.00</td>
</tr>
<tr>
<td>Acker, Paul M</td>
<td>$ 505.60</td>
<td>$ 102.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 607.60</td>
</tr>
<tr>
<td>Acord, Nancy</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Adam, Scott L.</td>
<td>$ 0.00</td>
<td>$ 52.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 52.00</td>
</tr>
<tr>
<td>Adams, Herb</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Addington</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Afto</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Albert</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Altdorfer</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Alviani, Nikole</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 293.00</td>
</tr>
<tr>
<td>Anderson, Debra</td>
<td>$ 31.96</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 1.80</td>
<td>$ 0.00</td>
<td>$ 43.20</td>
</tr>
<tr>
<td>Andrews, Josephine</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 150.00</td>
</tr>
<tr>
<td>Angle, Wenshing</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 30.00</td>
</tr>
<tr>
<td>Annunziata, Kimber</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 92.00</td>
</tr>
<tr>
<td>Archer, Brad</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 112.00</td>
</tr>
</tbody>
</table>

*Many function keys to help you review each account from one program.*

Work With All lets you run commands for all accounts listed.
Personal Collections
persview

Print a bill for every account on the list.

Use form letters to automatically add flags to each account on the list, as well as print a letter.

<table>
<thead>
<tr>
<th>Name</th>
<th>Current</th>
<th>30..59</th>
<th>60..89</th>
<th>90..119</th>
<th>120+</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caruso, Donald</td>
<td>$56.00</td>
<td>$0.00</td>
<td>$139.20</td>
<td>$17.40</td>
<td>$0.00</td>
<td>$212.60</td>
</tr>
<tr>
<td>Caven, Rene</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$139.20</td>
<td>$10.00</td>
<td>$0.00</td>
<td>$10.00</td>
</tr>
<tr>
<td>Harris, Mark A.</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$54.91</td>
<td>$0.00</td>
<td>$54.91</td>
</tr>
</tbody>
</table>

PCC
Pediatric EHR Solutions

Control Your Future™
Personal Collections
Payment Plans

- Setting up a payment plan
  - Create a form letter explaining their responsibilities
  - Update the Budget field in fame
  - Give them a flag so you can easily review the accounts on a payment plan to verify they are paying
Add the Budget Amt in fame and it appears on personal bills as the due field.
### Personal Collections persview

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>CURRENT PHONE</th>
<th>CURRENT LBL 1</th>
<th>Payment Plan</th>
<th>LAST PAYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1&gt; Buchanan, John</td>
<td>802-727-6763</td>
<td>802-195-1817</td>
<td>30..59</td>
<td>$ 136.00</td>
</tr>
<tr>
<td>2&gt; Canning, John</td>
<td>802-250-8812</td>
<td>802-195-1817</td>
<td>60..89</td>
<td>$ 208.00</td>
</tr>
<tr>
<td>3&gt; Douglas, William</td>
<td>802-512-8802</td>
<td>802-195-1817</td>
<td>90..119</td>
<td>$ 45.00</td>
</tr>
<tr>
<td>4&gt; Mcclain, Charles</td>
<td>802-663-2982</td>
<td>802-195-1817</td>
<td>120+ (days)</td>
<td>$ 90.00</td>
</tr>
<tr>
<td>5&gt; TOTAL</td>
<td>802-195-1817</td>
<td>802-195-1817</td>
<td></td>
<td>$ 479.00</td>
</tr>
</tbody>
</table>

- Last payment date includes copays!
- Access coll via fame to see pmts.
- Print missed payment plan form letter easily.
- Jump into oops as needed.
Personal Collections notify

- Notify allows you to send account balance information.
  - Hello this is Pediatric Associates calling. Our records indicate that your account is more than 60 days overdue. Please call our office at 800-722-1082 to arrange payment today. Thank you!
Personal Collections

Collections

- Sending an account to collection agency, two options
  - Adjust off charges
  - Pend charges to Agency
- Regardless of option selected above:
  - Print charge information for collection agency
Personal Collections
Collections: Adjusting Charges

- Run Post Personal Payments (pam)
  - Find account
  - Post Bad Debt/Collection Adjustment and link to charges being sent to collections
  - Add Collection flag to account
  - Update account notes
Personal Collections

Collections: Adjusting Charges

POSTING PERSONAL PAYMENTS

<table>
<thead>
<tr>
<th>First Name: John</th>
<th>Phone Lbl 1: 802-250-8812</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name: Canning</td>
<td>Phone Lbl 2: 802-335-5981</td>
</tr>
<tr>
<td>Status: Payment Plan</td>
<td></td>
</tr>
<tr>
<td>Address: 584 Water Street</td>
<td></td>
</tr>
<tr>
<td>City: Irasburg</td>
<td></td>
</tr>
<tr>
<td>State: VT</td>
<td></td>
</tr>
<tr>
<td>Zip Code: 05845</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PAYNG</th>
<th>0-30</th>
<th>31-60</th>
<th>61-90</th>
<th>Over 90</th>
<th>Old Bal</th>
<th>New Bal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person: $0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$208.00</td>
<td>$208.00</td>
<td>$208.00</td>
</tr>
<tr>
<td>Insuran: $0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$279.00</td>
<td>$279.00</td>
<td>$279.00</td>
</tr>
<tr>
<td>Medical: $0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Payment/Adjustment Type</th>
<th>Amount</th>
<th>Check #</th>
<th>Print receipt for</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/15/13</td>
<td>BadDebt/Collection</td>
<td>$208.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Button Options: | Save | Next Account | Post A Refund | Link Payments | Print A Bill | Correct Mistakes | Family Editor | Acct History |

Post the adjustment
Link the adj to the charges
Add Collection flag and notes to the account
Personal Collections Collections: Adjusting Charges

- When you receive a payment from the collection agency do one of the following two options, then add a note in fame.
  - Delete the bad debt adjustment you posted and post the payment using a payment type that indicates the payment was from a collection agency.
  - Post a "Collection Income" adjustment in the refund program and then post a Collection Payment against that adjustment using pam.
Personal Collections
Collections: Pend Agency

- Partner configuration needed for this option
  - Add “Collection” as an insurance group
  - Add “1. Collection Agency” as an insurance company
  - This makes it easier to find in oops
Personal Collections
Collections: Pend Agency

- Go into Correct Mistakes (oops) for this account and change the charges to pend the 1. Collection Agency
  - Add Collection flag and notes to the account
## Personal Collections

### Collections: Pend Agency

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DATE</th>
<th>PATIENT</th>
<th>PROCEDURE NAME</th>
<th>DIAG</th>
<th>SVC</th>
<th>AMOUNT</th>
<th>SUM</th>
<th>DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>42</td>
<td>10/20/12</td>
<td>10/20/12</td>
<td>Other claim batted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>08/06/12</td>
<td>C John</td>
<td>Well Child 5-11 y V70.0 C C</td>
<td></td>
<td></td>
<td>95.00</td>
<td>95.00</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>08/07/12</td>
<td></td>
<td>Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>46</td>
<td>08/06/12</td>
<td></td>
<td>Other claim batted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>47</td>
<td></td>
<td>John</td>
<td>Respiratory Flow 493.81 C C</td>
<td></td>
<td></td>
<td>28.00</td>
<td>28.00</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td></td>
<td></td>
<td>Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>49</td>
<td></td>
<td></td>
<td>Other claim batted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>John</td>
<td>Spirometry Simple 493.81 C C</td>
<td></td>
<td></td>
<td>70.00</td>
<td>70.00</td>
<td></td>
</tr>
<tr>
<td>51</td>
<td></td>
<td></td>
<td>Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>52</td>
<td></td>
<td></td>
<td>Other claim batted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>53</td>
<td></td>
<td>P John</td>
<td>Same 737.30 C C</td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>54</td>
<td></td>
<td></td>
<td>Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55</td>
<td></td>
<td></td>
<td>Other claim batted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>56</td>
<td>01/30/12</td>
<td>C John</td>
<td>OV Expanded Focus 917.8 G G</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57</td>
<td>03/06/12</td>
<td></td>
<td>Ins Pmt Direct Blue #110088 G</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>58</td>
<td>03/06/12</td>
<td></td>
<td>Ins Adj Direct Blue #110088 G</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59</td>
<td>02/01/12</td>
<td></td>
<td>Claim (from BCBS) to BCBS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Personal: $ 208.00
Insurance: $ 279.00
Medicaid: $ 0.00

Hit F4 to pend to the new collection agency insco

Find the charges

---

**PCC**

Pediatric EHR Solutions

Control Your Future™
### Personal Collections

**Collections: Pend Agency**

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Name</th>
<th>Description</th>
<th>Charge</th>
<th>Type</th>
<th>Collection</th>
<th>Payment Method</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/06/12</td>
<td>58</td>
<td>PC John Thomas</td>
<td>99393 Well Child 5-11 V70.0</td>
<td>95.00</td>
<td>C</td>
<td>C</td>
<td>80.86</td>
<td>4.14</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>12/31/13 Personal Check Payment #1234</td>
<td>14.14</td>
<td>C</td>
<td>C</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/07/12 Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/06/12 Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/06/12</td>
<td>62</td>
<td>P John Thomas</td>
<td>94375 Respiratory Flow 493.81</td>
<td>28.00</td>
<td>C</td>
<td>C</td>
<td>28.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/07/12 Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/06/12 Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/06/12</td>
<td>65</td>
<td>P John Thomas</td>
<td>94010 Spirometry Simpl 493.81</td>
<td>70.00</td>
<td>C</td>
<td>C</td>
<td>70.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/07/12 Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/06/12 Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/07/12</td>
<td>68</td>
<td>P John Thomas Same</td>
<td>737.30</td>
<td>0.00</td>
<td>C</td>
<td>C</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/07/12 Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/06/12 Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/07/12</td>
<td>71</td>
<td>John Thomas</td>
<td>00000 Bonus Fee</td>
<td>0.00</td>
<td>N</td>
<td>N</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Personal:** $ 52.10  
**Insurance:** $ 482.00  
**Medicaid:** $ 0.00

Type in the numbers for the charges going to Collection OR Use the new function keys!

---

**Control Your Future ™**

**Pediatric EHR Solutions**
Personal Collections
Collections: Pend Agency

Some Other Insurance allows you to choose any insurance company.

The 1. sorts the Collection Agency to the top of the list.
Personal Collections
Collections: Pend Agency

Now hit F1 to save and the charges will be pending collection

<table>
<thead>
<tr>
<th>DATE</th>
<th>PATIENT</th>
<th>PROCEDURE NAME</th>
<th>DIAG</th>
<th>SVC</th>
<th>BIL</th>
<th>AMOUNT</th>
<th>SUM DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
<td>John</td>
<td>Well Child 5-11 yr V70.0</td>
<td>C</td>
<td>C</td>
<td></td>
<td>95.00</td>
<td>95.00</td>
</tr>
<tr>
<td></td>
<td>Insurance:</td>
<td>1. Collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>John</td>
<td>Respiratory Flow V 493.81</td>
<td>C</td>
<td>C</td>
<td></td>
<td>28.00</td>
<td>28.00</td>
</tr>
<tr>
<td></td>
<td>Insurance:</td>
<td>1. Collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>John</td>
<td>Spirometry Simple 493.81</td>
<td>C</td>
<td>C</td>
<td></td>
<td>70.00</td>
<td>70.00</td>
</tr>
<tr>
<td></td>
<td>Insurance:</td>
<td>1. Collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Personal Collections

Collections: Pend Agency

● Use insaging and inscoar to review charges pending the “1. Collection” insurance company.

● Post payments using pip
  – Leave balance pending “1. Collection” or adjust off

● Update notes on the account in fame
  – Post a follow up up to the original note
Personal Collections
Collections: Other Reports

- Smart Report Suite (srs)
  - Billing & Collections Reports
    - Accounts with Credit Balances
    - Collection Worksheet for Appointments
    - Copay Collection Ratio
    - Insurance Eligibility Report
    - Insurance Eligibility Report for Same Day Appts
Personal Collections Review

- Pre Visit
  - Scheduling
  - Appointment Verification
  - Billing Department Prep
Personal Collections Review

- Configuration
  - Self Pay Insurance Configuration
  - Charge Screen Configuration
  - SNAP codes
- Posting Charges
Personal Collections Review

- Personal Collections
  - Send personal bills
  - Post payments
  - Work Personal A/R
  - Sending an Account to Collections
  - Reports
Personal Collections
learn.pcc.com

http://learn.pcc.com/program/partner/personalbilling/
Personal Collections

Questions?

- At 1pm this afternoon head to the Collection Roundtable for more discussion with myself and Romni.