Personal Collections

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PCC 2017 Users' Conference

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PCC Pediatric EHR Solutions

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

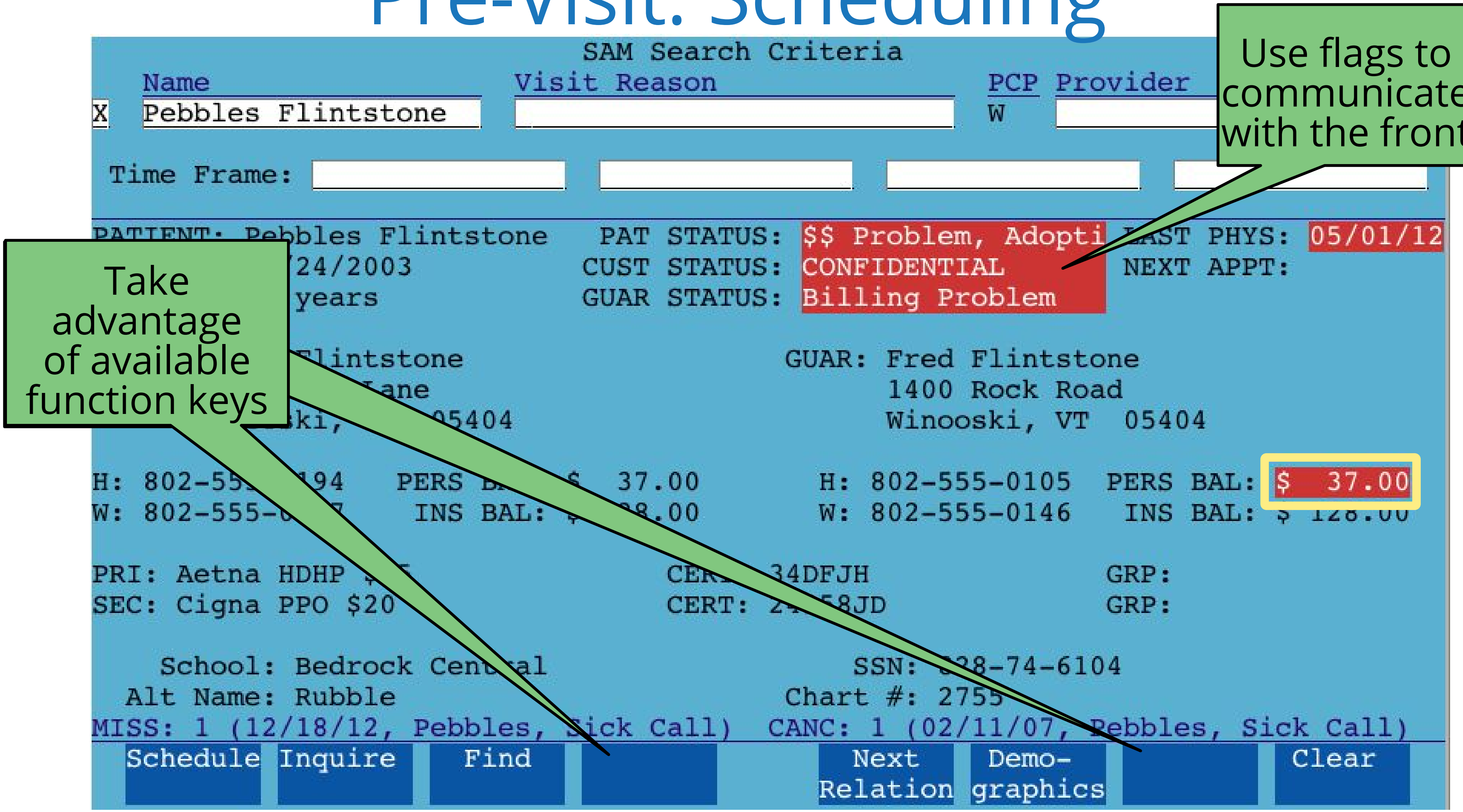
The processes used *prior* to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

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



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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.
- Seriously 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
    - This should not need to be something the back office does.

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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
  - Patient Portal

Personal Collections
Personal Statements

ebill **vs** **bills**

- Look more professional
- Submit electronically
- Cost per bill
  - $.79366 first page
  - $.2235 each addt'l page

- Plain printing, nothing fancy
- Print in your office
- Folding, stuffing, stamping, and time costs
- More control

Personal Collections
Personal Statements

Doctors Office

This is where billing messages go. You can have different messages based on aging of the balance or have a default message.

Billing Date	Pay This Amount	Account #
07/10/12	$ 607.60	1213

Pmt Method: MasterCard Visa Amex Check

Card#: Amt:

Sig: Exp:

Billing message

NOTICE:
This is where a family specific message can go....

Budget Amount: $ 50.00

Budget / Payment plans on bills and in fame

Send Payment To:

ul M Acker
453 Spring Road
Proctorsville, VT 05153

Doctors Office
20 Winooski Falls Way
Suite 7
Winooski, VT 05404
(802) 846-8177

Account Billing Notes

Please Detach And Return Top Portion With Your Payment

Page: 01

Description of Services From 06/01/12 to 07/10/12	Charges	Payments & Adjustments	Due From Insurance	Due From Patient
ALANCE FORWARD				$ 0.00
Lauren Acker (Dr. Davidson, Office)				
03/17/12 OV Expanded Focus	$ 56.00			$ 10.00
06/29/12 Ins Pmt -- North American Health		$ 46.00-		

Last Service:	Jul 8, 20
Last Bill Sent:	Jul 10, 20 2
Last Pers Pmt:	May 6, 20 2
Last Ins Pmt:	Jul 6, 20 2
Hold Bill Till:	
Budget Amt:	$ 50.00

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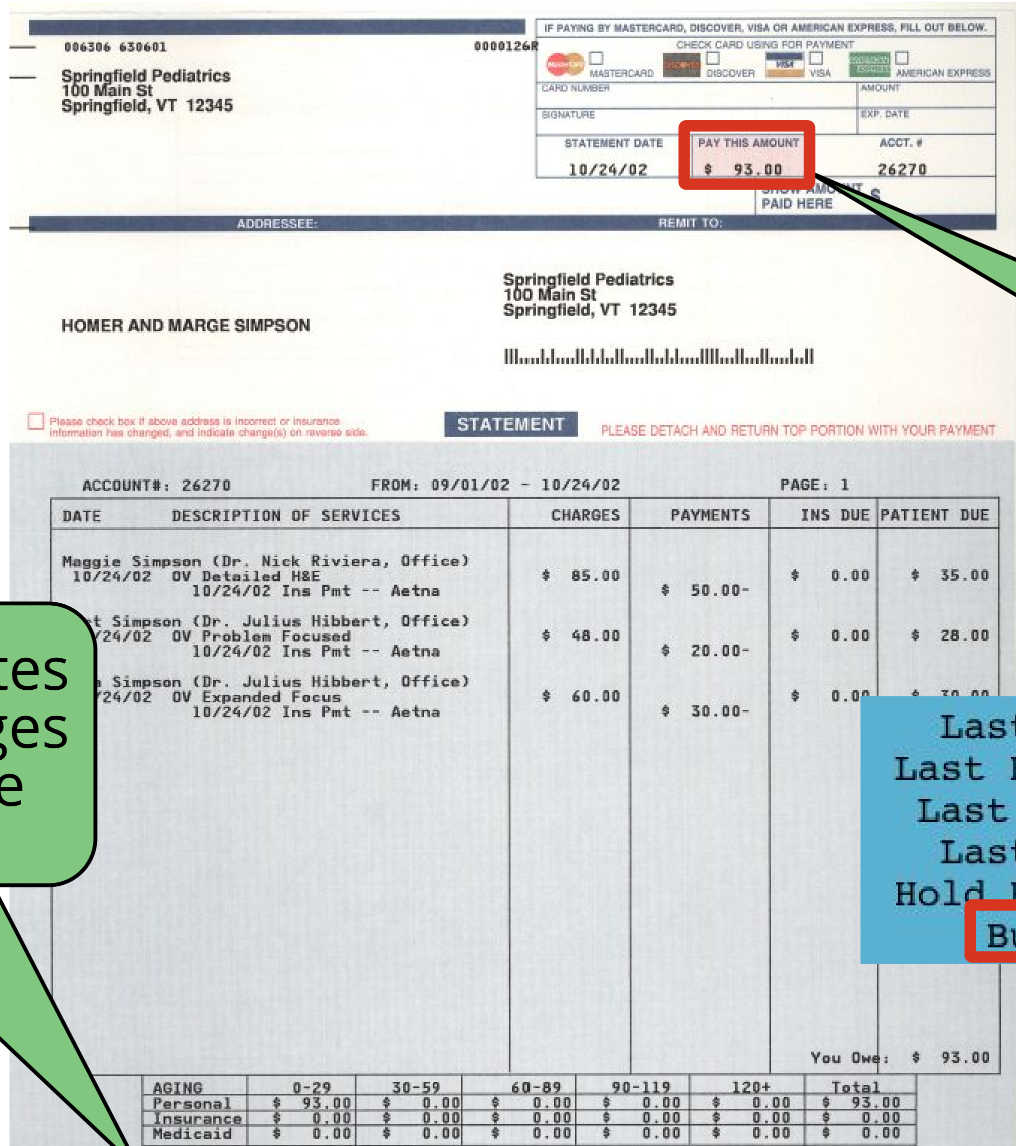
Personal Collections

Personal Statements: Diamond Health



006306 630601 0000126R

Springfield Pediatrics
100 Main St
Springfield, VT 12345

IF PAYING BY MASTERCARD, DISCOVER, VISA OR AMERICAN EXPRESS, FILL OUT BELOW.
CHECK CARD USING FOR PAYMENT
MASTERCARD DISCOVER VISA AMERICAN EXPRESS

CARD NUMBER	AMOUNT
SIGNATURE	EXP. DATE

STATEMENT DATE	PAY THIS AMOUNT	ACCT. #
10/24/02	$ 93.00	26270

SHOW AMOUNT PAID HERE $

ADDRESSEE: REMIT TO:

HOMER AND MARGE SIMPSON

Springfield Pediatrics
100 Main St
Springfield, VT 12345

Please check box if above address is incorrect or insurance information has changed, and indicate change(s) on reverse side.

STATEMENT

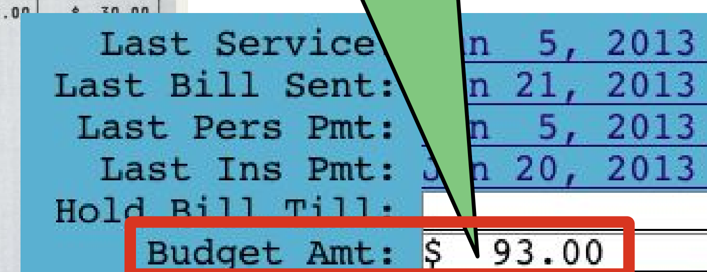
PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT

ACCOUNT#: 26270 FROM: 09/01/02 - 10/24/02 PAGE: 1

DATE DESCRIPTION OF SERVICES	CHARGES	PAYMENTS	INS DUE	PATIENT DUE
Maggie Simpson (Dr. Nick Riviera, Office) 10/24/02 OV Detailed H&E 10/24/02 Ins Pmt -- Aetna	$ 85.00	$ 50.00-	$ 0.00	$ 35.00
...t Simpson (Dr. Julius Hibbert, Office) ...24/02 OV Problem Focused 10/24/02 Ins Pmt -- Aetna	$ 48.00	$ 20.00-	$ 0.00	$ 28.00
... Simpson (Dr. Julius Hibbert, Office) ...24/02 OV Expanded Focus 10/24/02 Ins Pmt -- Aetna	$ 60.00	$ 30.00-	$ 0.0...	...

You Owe: $ 93.00

AGING	0-29	30-59	60-89	90-119	120+	Total
Personal	$ 93.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 93.00
Insurance	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Medicaid	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00



Budget amount appears here if set in fame.

Account billing notes and billing messages appear below the aging section.

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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

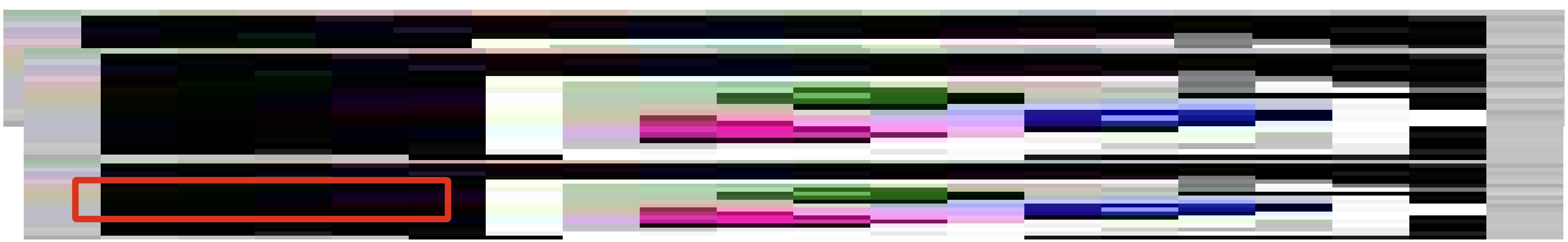
```
Please choose which billing message you would like to work with:

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)

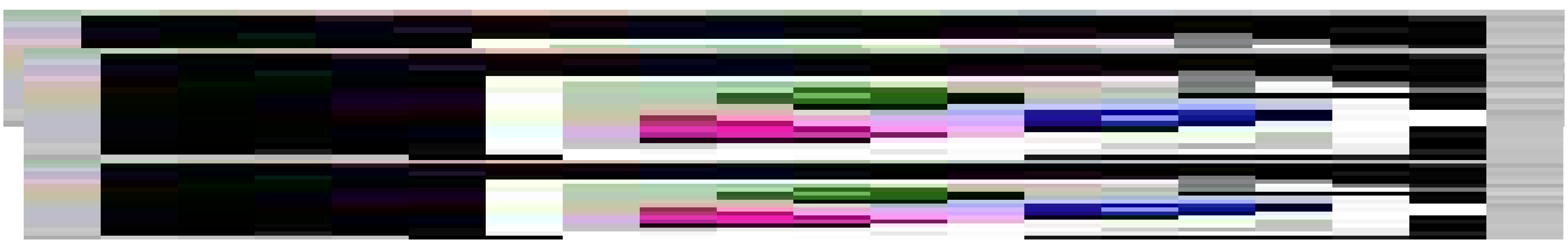
```
Acct PCC: 1                  The Family Editor                    Page 4 of 5
                        Account Billing Note: John Canning
     Search Pattern: ____________________  Search on whole words: No

X 04/16/12 Please remember to pay a minimum of your payment plan amount. Thank
         you!
                                                - 02:26 pm lynne    (Modified)
```

  - Use cis to track which accounts have account billing notes



Personal Collections
Personal Statements

- Patient Portal
  - Parents will soon have access balances in the Patient Portal.
  - Expect to see personal statements and the ability to post payments in the near future



Personal Collections
Bills: Work with Accounts

- Review accounts before printing or submitting bills!

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Personal Collections
Bills: Work with Accounts

- Function keys allow you to make changes to the account
- Review each bill, then regenerate

Print Personal Bills – Work with Accounts Generated: 06/20/2016 11:39am

	Account Name	Current	30..59	60..89	90..119	120+	Total
X	Achey, Jeremy	$ 0.00	$ 0.00	$ 0.00	$ 56.00	$ 0.00	$ 56.00
	Acker, Paul M	$ 0.00	$ 0.00	$ 0.00	$ 486.60	$ 121.00	$ 607.60
	Acord, Nancy	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 20.00	$ 20.00
	Awwad, Daniel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 46.00	$ 46.00

Back | Edit Account | Correct Mistakes | Post Payments | Preview Bill | Hold Bill | Form Letters | Sort By Total

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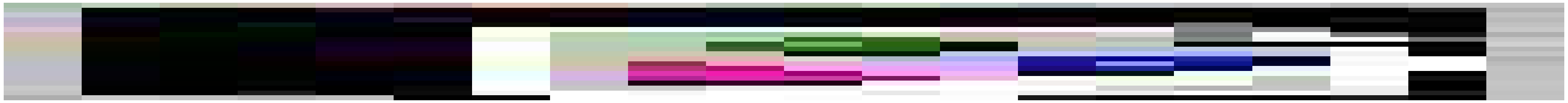
Personal Collections
billlog

- Researching previously sent bills
  - billlog
  - aka F8 in bills / ebills



Personal Collections
billlog

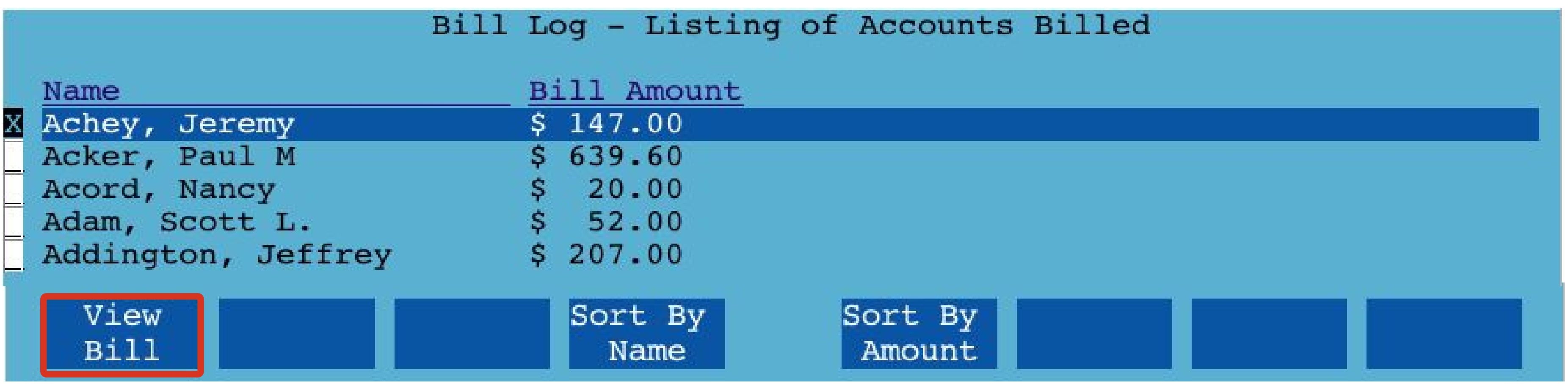
Bill Log - Bill Batch Listing

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

Accounts Billed | Accounts NotBilld

Personal Collections billlog

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



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Personal Collections
billlog

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

```
                        Bill Log - Accounts Not Billed

Account, Test            (#100000)     Total bal $    0.00   is not billable.
Acker, Patricia          (#28)         Total bal $    0.00   is not billable.
Adams, Ambrocio          (#1962)       Total bal $    0.00   is not billable.
Adams, Herb              (#1348)    Personal bal $    3.26   below cutoff $   4.99.
Beltz, Christopher       (#671)        Total bal $   26.81CR is not billable.
Catalani, John           (#1092)    Flag #4 held bill.
```

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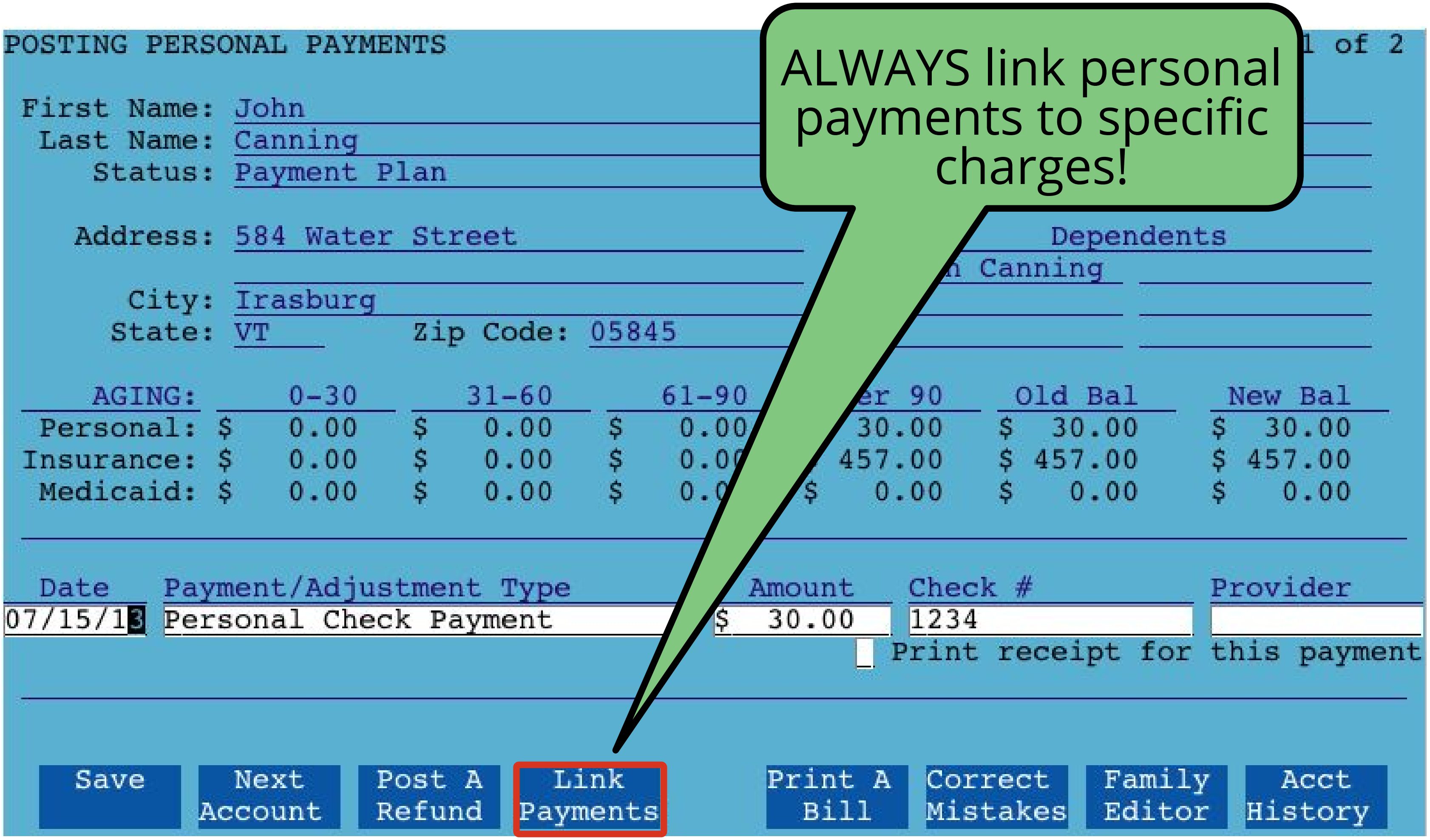
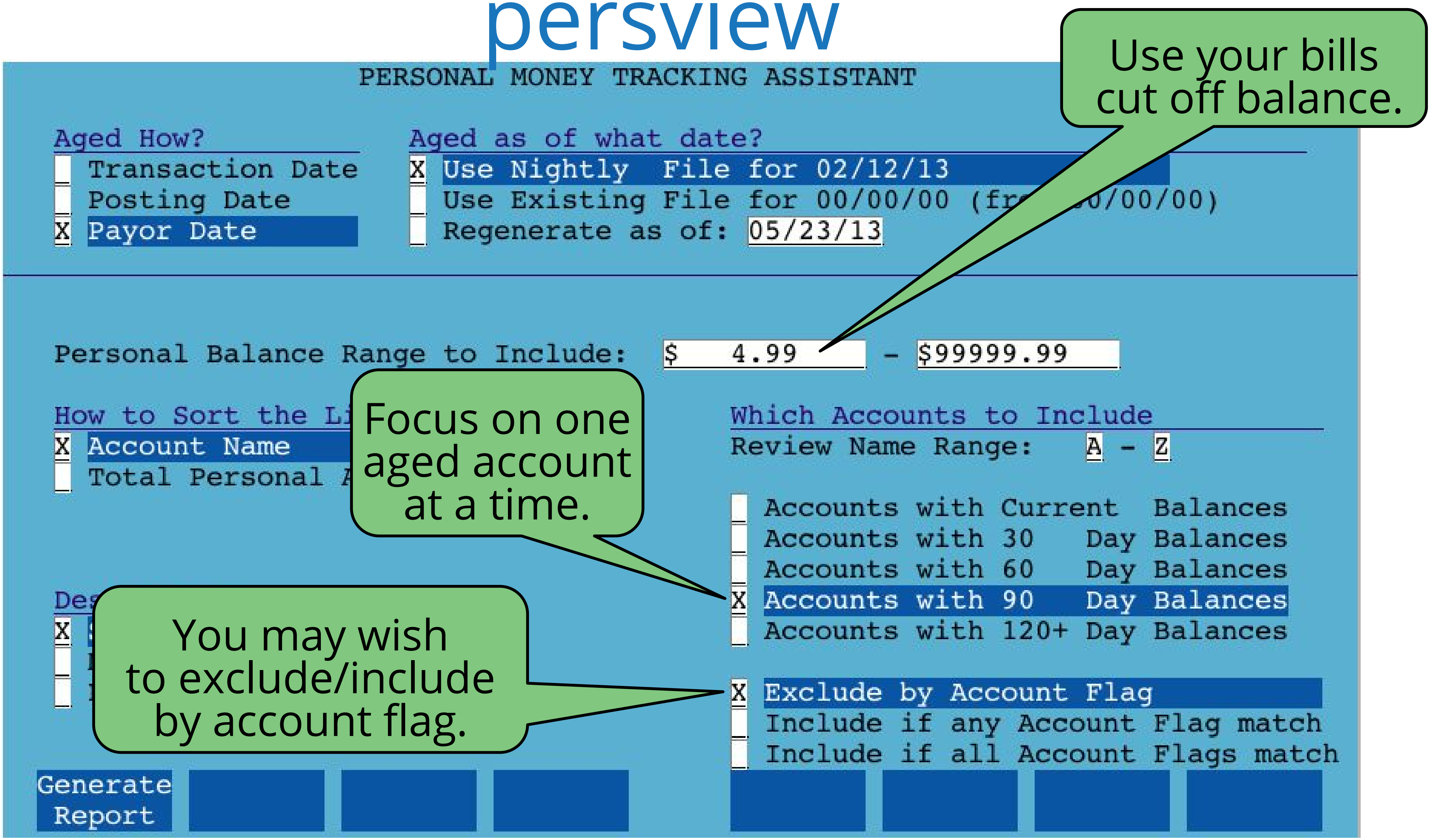
Personal Collections
Personal Payments



Personal Collections
persview



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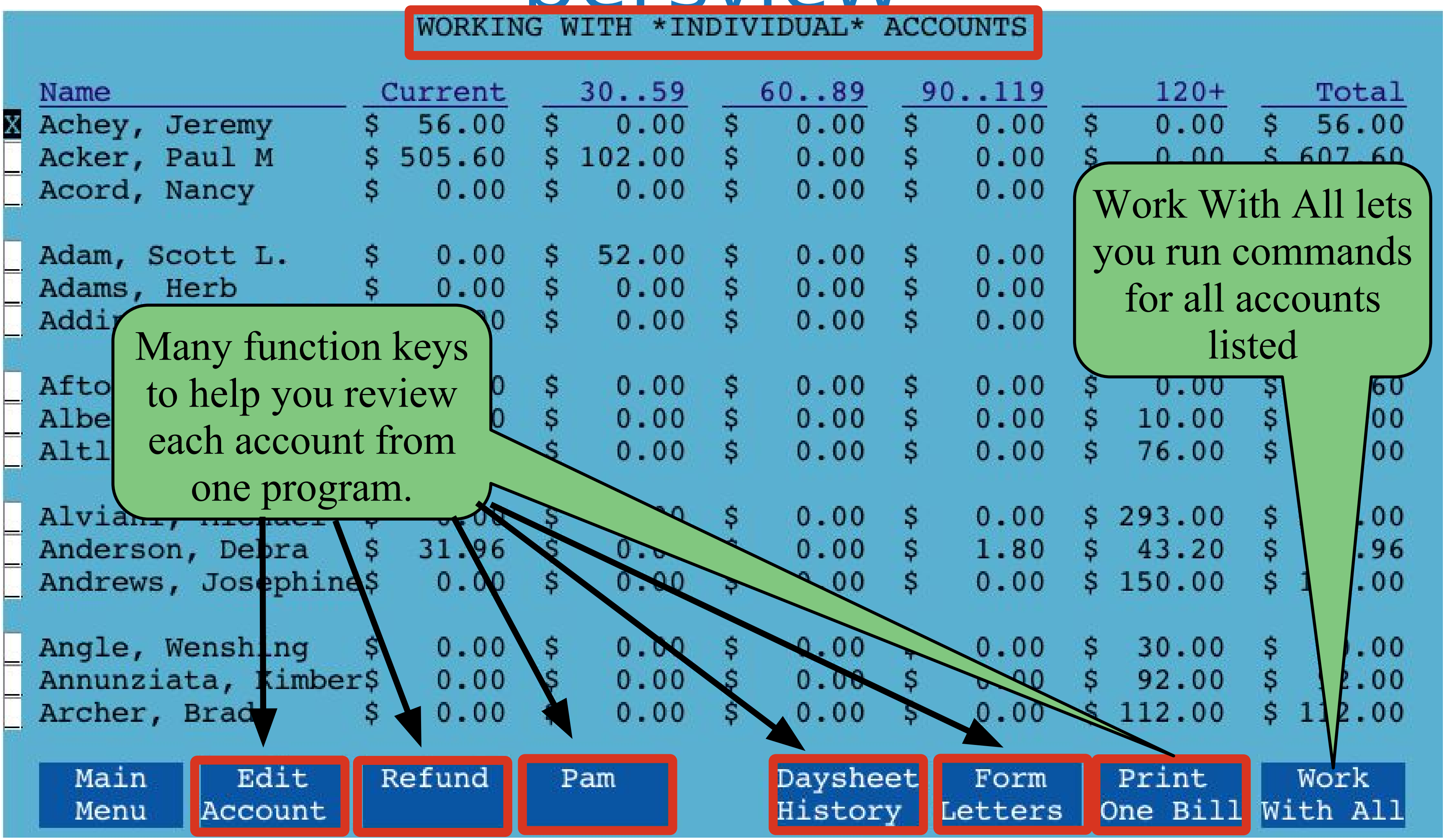
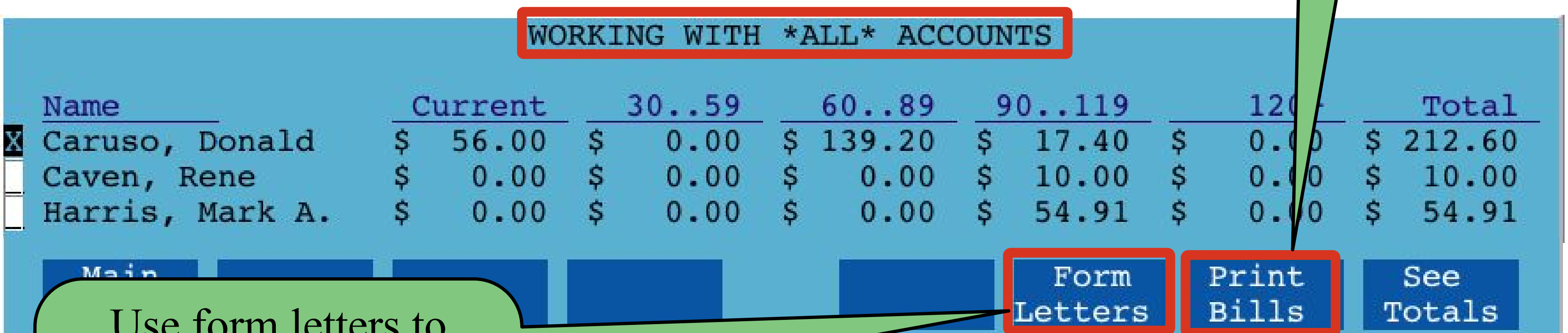
Personal Collections persview



Personal Collections persview

Print a bill for every account on the list.


WORKING WITH *ALL* ACCOUNTS

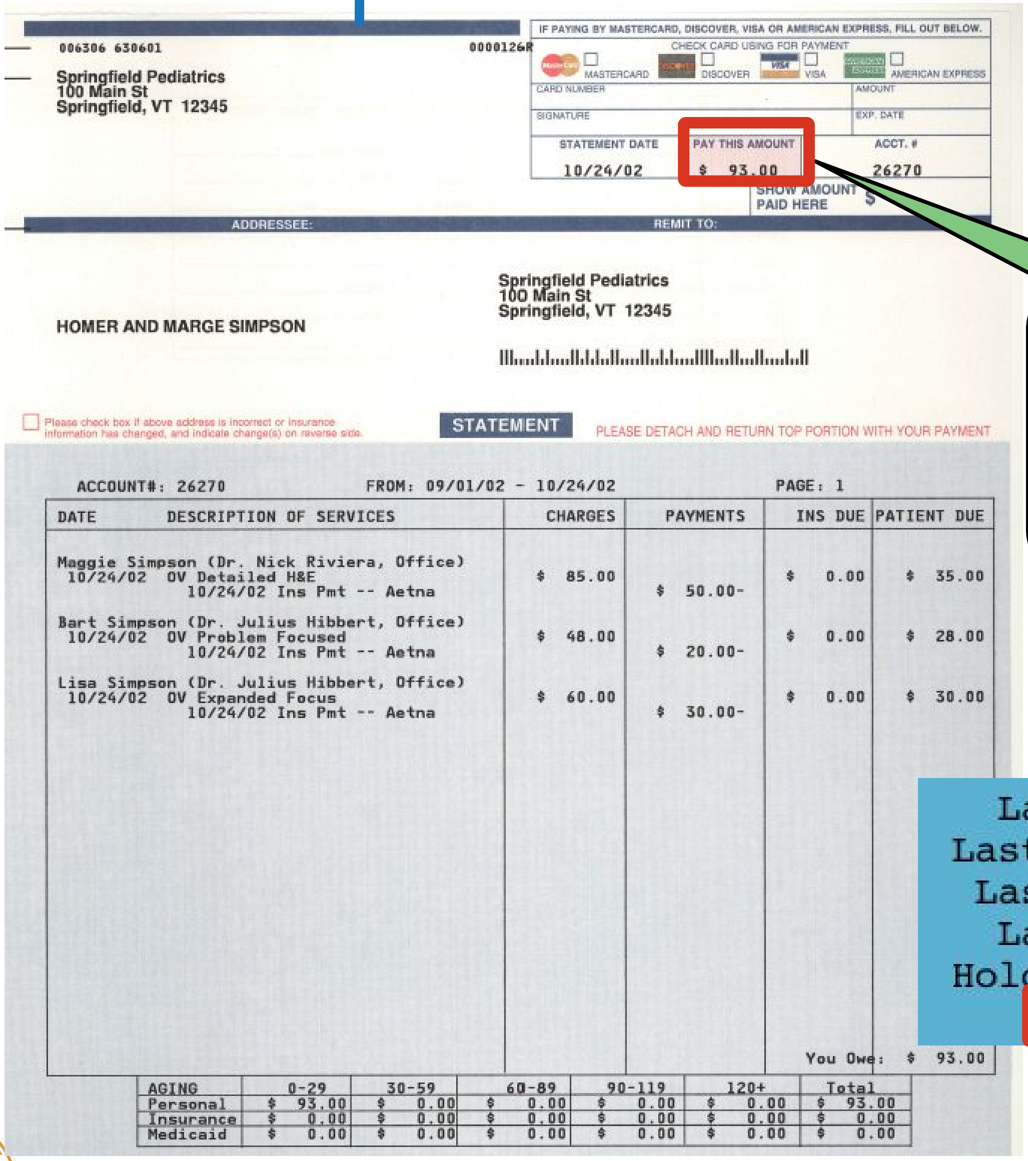
	Name	Current	30..59	60..89	90..119	120+	Total
X	Caruso, Donald	$ 56.00	$ 0.00	$ 139.20	$ 17.40	$ 0.00	$ 212.60
	Caven, Rene	$ 0.00	$ 0.00	$ 0.00	$ 10.00	$ 0.00	$ 10.00
	Harris, Mark A.	$ 0.00	$ 0.00	$ 0.00	$ 54.91	$ 0.00	$ 54.91

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

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

Personal Collections persview



IF PAYING BY MASTERCARD, DISCOVER, VISA OR AMERICAN EXPRESS, FILL OUT BELOW.

CHECK CARD USING FOR PAYMENT

MASTERCARD DISCOVER VISA AMERICAN EXPRESS

CARD NUMBER AMOUNT

SIGNATURE EXP. DATE

006306 630601 0000126R

Springfield Pediatrics
100 Main St
Springfield, VT 12345

STATEMENT DATE	PAY THIS AMOUNT	ACCT. #
10/24/02	$ 93.00	26270

SHOW AMOUNT PAID HERE $

ADDRESSEE: REMIT TO:

HOMER AND MARGE SIMPSON

Springfield Pediatrics
100 Main St
Springfield, VT 12345

Please check box if above address is incorrect or insurance information has changed, and indicate change(s) on reverse side.

STATEMENT

PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT

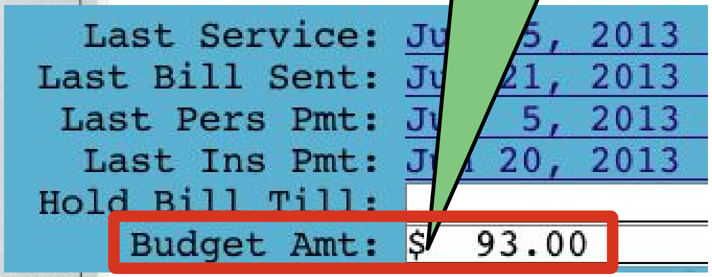
ACCOUNT#: 26270 FROM: 09/01/02 - 10/24/02 PAGE: 1

DATE	DESCRIPTION OF SERVICES	CHARGES	PAYMENTS	INS DUE	PATIENT DUE
	Maggie Simpson (Dr. Nick Riviera, Office)				
10/24/02	OV Detailed H&E	$ 85.00		$ 0.00	$ 35.00
	10/24/02 Ins Pmt -- Aetna		$ 50.00-		
	Bart Simpson (Dr. Julius Hibbert, Office)				
10/24/02	OV Problem Focused	$ 48.00		$ 0.00	$ 28.00
	10/24/02 Ins Pmt -- Aetna		$ 20.00-		
	Lisa Simpson (Dr. Julius Hibbert, Office)				
10/24/02	OV Expanded Focus	$ 60.00		$ 0.00	$ 30.00
	10/24/02 Ins Pmt -- Aetna		$ 30.00-		

You Owe: $ 93.00

AGING	0-29	30-59	60-89	90-119	120+	Total
Personal	$ 93.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 93.00
Insurance	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Medicaid	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Add the Budget Amt in fame and it appears on personal bills as the due field.



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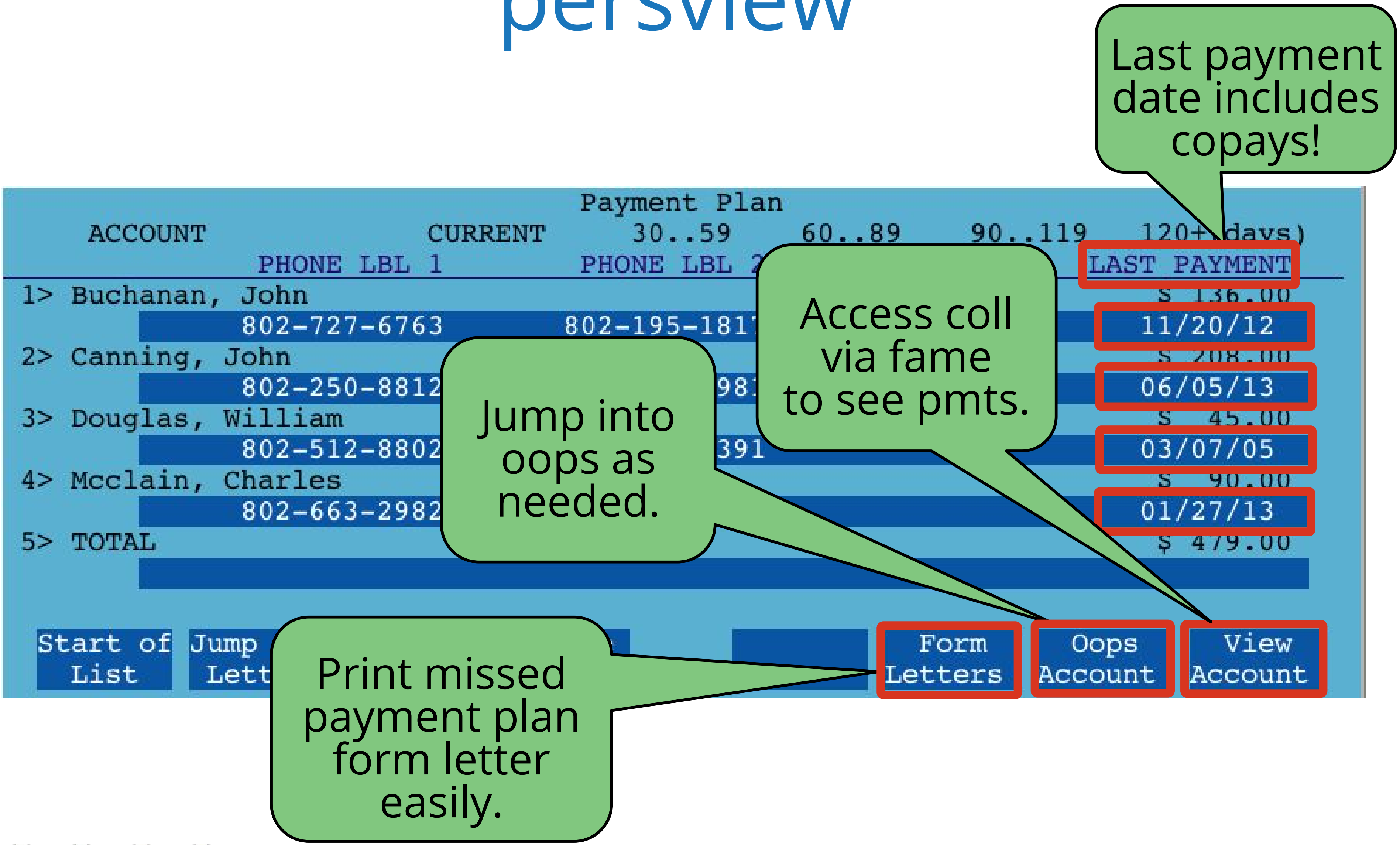
Personal Collections persview



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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!

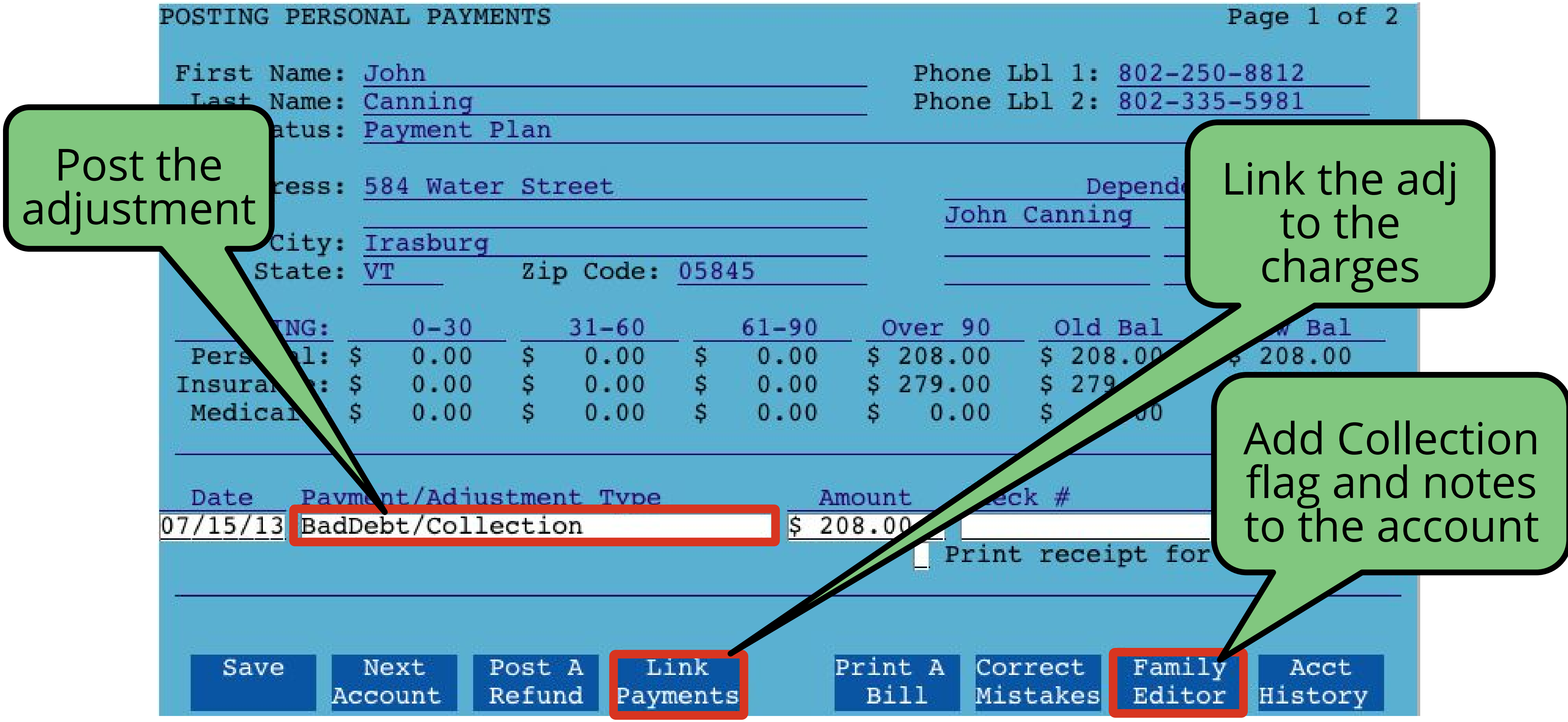
Personal Collections
Collections

- 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



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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

```
ITEM    DATE       PATIENT        PROCEDURE NAME      DIAG     SVC  BIL    AMOUNT   SUM DUE
 43) 10/20/12        10/20/12 Other claim batched
 44) 08/06/12   C John           Well Child 5-11 y V70.0  C    C       95.00     95.00
 45)                 08/07/12 Claim (from Other) to enbcbs
 46)                 08/06/12 Other claim batched
 47)              John           Respiratory Flow   493.81 C    C       28.00     28.00
 48)                 08/07/12 Claim (from Other) to enbcbs
 49)                 08/06/12 Other claim batched
 50)              John           Spirometry Simple 493.81 C    C       70.00     70.00
 51)                 08/07/12 Claim (from Other) to enbcbs
 52)                 08/06/12 Other claim batched
 53)            P John           Same               737.30 C    C        0.00      0.00
 54)                 08/07/12 Claim (from Other) to enbcbs
 55)                 08/06/12 Other claim batched
 56) 01/30/12   C John           OV Expanded Focus 917.8  G    G
 57)                 03/06/12 Ins Pmt Direct Blue #110088 G
 58)                 03/06/12 Ins Adj Direct Blue #110088 G
 59)                 02/01/12 Claim (from BCBS) to BCBS

 Personal: $ 208.00    Correcting John Canning (# 1).
Insurance: $ 279.00    There are 189 more items.
 Medicaid: $   0.00

 Jump to   Generate  SeeClaim  Insuranc          Visit    Unlink &  View Adj  Delete
  Item      Claim    Rpt/Bill   Status           Status    Relink   Reasons   Item(s)
```

Find the charges

Hit F4 to pend to the new collection agency insco

Personal Collections
Collections: Pend Agency

```
  08/06/12
58)  PC John Thomas  99393  Well Child 5-11  V70.0    C   C      95.00     80.86
   )      12/31/13 Personal Check Payment #1234       C          14.14
   )      08/07/12 Claim (from Other) to enbcbs
   )      08/06/12 Other claim batched
62)  P  John Thomas  94375  Respiratory Flow 493.81   C   C      28.00     28.00
   )      08/07/12 Claim (from Other) to enbcbs
   )      08/06/12 Other claim batched
65)  P  John Thomas  94010  Spirometry Simpl 493.81   C   C      70.00     70.00
   )      08/07/12 Claim (from Other) to enbcbs
   )      08/06/12 Other claim batched
68)  P  John Thomas  Same                    737.30   C   C       0.00      0.00
   )      08/07/12 Claim (from Other) to enbcbs
   )      08/06/12 Other claim batched
71)     John Thomas  00000  Bonus Fee        -        N   N       0.00      0.00

 Personal: $  52.10   Correcting John Canning (# 1).
Insurance: $ 482.00   There are 193 more items.
 Medicaid: $   0.00   Type item numbers to edit:

                  Enter     Enter
                 Claim ID    Date
```

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

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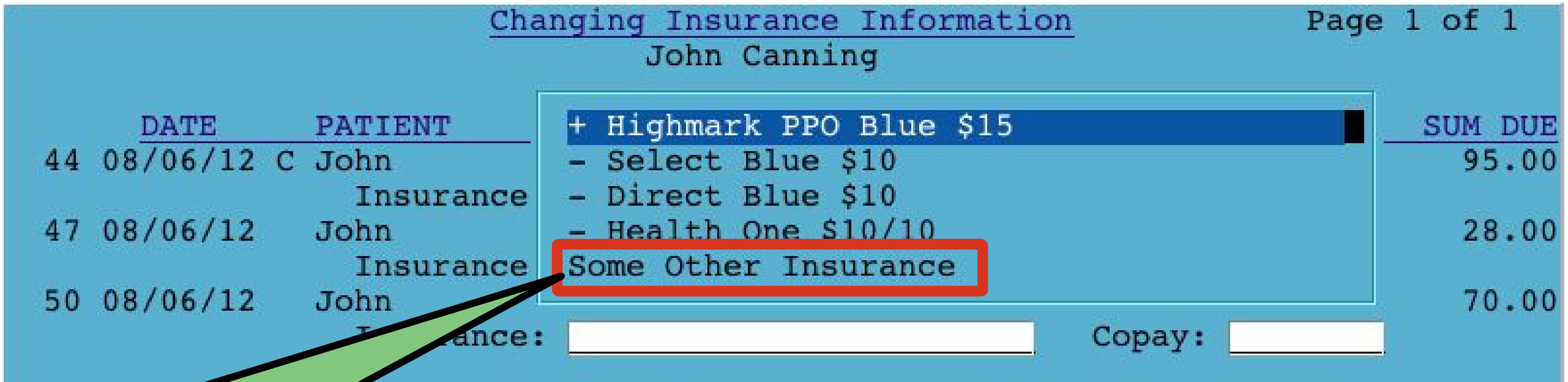
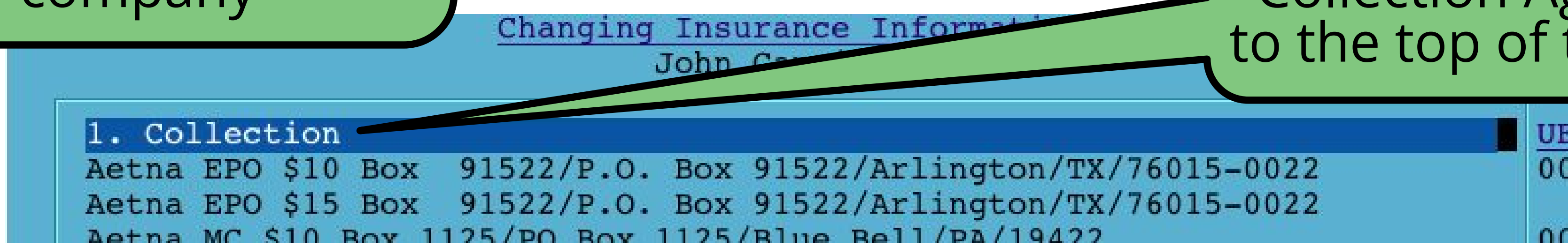
Personal Collections
Collections: Pend Agency



Some Other Insurance allows you to choose any insurance company



The 1. sorts the Collection Agency to the top of the list

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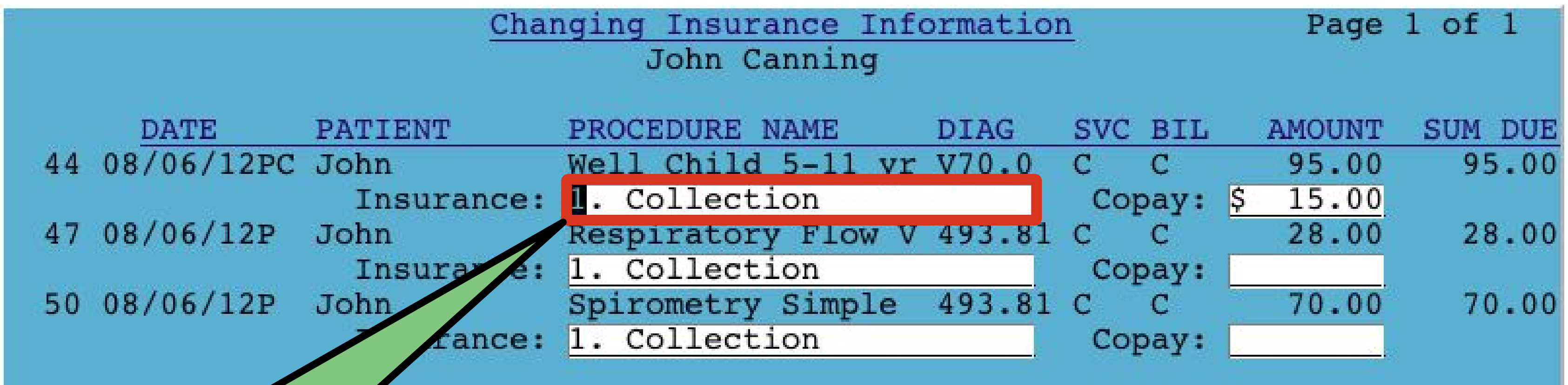
Personal Collections
Collections: Pend Agency



Changing Insurance Information — Page 1 of 1

John Canning

	DATE	PATIENT	PROCEDURE NAME	DIAG	SVC	BIL	AMOUNT	SUM DUE
44	08/06/12PC	John	Well Child 5-11 yr	V70.0	C	C	95.00	95.00
		Insurance:	1. Collection		Copay:		$ 15.00	
47	08/06/12P	John	Respiratory Flow V	493.81	C	C	28.00	28.00
		Insura e:	1. Collection		Copay:			
50	08/06/12P	John	Spirometry Simple	493.81	C	C	70.00	70.00
		rance:	1. Collection		Copay:			

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

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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 to the original note

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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?
  - On Thursday at 3:45pm head to the Collection Roundtable for more discussion with myself and Jim Frei.