Personal Collections

Lynne Y Gratton, CPPM, AAPC Fellow
PCC 2017 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

Use flags to communicate with the front desk.

Take advantage of available function keys.

- 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: 802-555-194
- PERS BAL: $ 37.00
- W: 802-555-0105
- INS BAL: $ 128.00
- PRI: Aetna HDHP
- CERT: 34DFJH
- SEC: Cigna PPO $20
- CERT: 2A58JD
- SSN: 528-74-6104
- Chart #: 2755
- 1 (12/18/12, Pebbles, Sick Call)
- CANC: 1 (02/11/07, Pebbles, Sick Call)
- Schedule
- Inquire
- Find
- Next Relation
- Demo-graphics
- Clear

Pediatric EHR Solutions
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.
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

<table>
<thead>
<tr>
<th><strong>ebill</strong></th>
<th><strong>vs</strong></th>
<th><strong>bills</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Look more professional</td>
<td></td>
<td>Plain printing, nothing fancy</td>
</tr>
<tr>
<td>Submit electronically</td>
<td></td>
<td>Print in your office</td>
</tr>
<tr>
<td>Cost per bill</td>
<td></td>
<td>Folding, stuffing, stamping, and time costs</td>
</tr>
<tr>
<td>- $.79366 first page</td>
<td></td>
<td>More control</td>
</tr>
<tr>
<td>- $.2235 each addt'l page</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

Budget / Payment plans on bills and in fame

BILLING DATE: 07/10/12
Pay This Amount: $607.60
Account #: 1213

Payment Method: MasterCard
Visa
Amex
Check

Card#: 
Amt: 
Sign: 
Exp: 

Send Payment To:
Doctors Office
453 Spring Road
Proctorsville, VT 05153
(802) 846-8177

Bill Amount: $ 50.00

Lauren Acker (Dr. Davidson, Office)
03/17/12 OV Expanded Focus $ 56.00
06/29/12 Ins Pmt -- North American Health $ 46.00-

Balance Forward $ 0.00

Payments & Adjustments
Due From Insurance $ 10.00
Due From Patient

Last Service: Jul 8, 2012
Last Bill Sent: Jul 10, 2012
Last Pers Pmt: May 6, 2012
Last Ins Pmt: Jul 6, 2012
Hold Bill Till
Budget Amt: $ 50.00

Account Billing Notes
Billing message
Personal Collections
Personal Statements: Diamond Health

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

Budget amount appears here if set in fame.
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

<table>
<thead>
<tr>
<th>Please choose which billing message you would like to work with:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A)</strong> The default message (used when one of the others does not exist)</td>
</tr>
<tr>
<td>1) The Normal Bills message</td>
</tr>
<tr>
<td>2) The Overdue 30 Day Bills message</td>
</tr>
<tr>
<td>3) The Overdue 60 Day Bills message</td>
</tr>
<tr>
<td>4) The Overdue 90 Day Bills message</td>
</tr>
<tr>
<td>5) The Overdue 120 Day Bills message</td>
</tr>
</tbody>
</table>
**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>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Billing Note:</strong> John Canning</td>
<td></td>
</tr>
<tr>
<td>Search Pattern:</td>
<td>Search on whole words: No</td>
</tr>
</tbody>
</table>

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!
Personal Collections
Bills: Work with Accounts

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

<table>
<thead>
<tr>
<th>Account 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>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 56.00</td>
<td>$ 0.00</td>
<td>$ 56.00</td>
</tr>
<tr>
<td>Acker, Paul M</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 486.60</td>
<td>$ 121.00</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>$ 20.00</td>
<td>$ 20.00</td>
</tr>
<tr>
<td>Awwad, Daniel</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 46.00</td>
<td>$ 46.00</td>
</tr>
</tbody>
</table>

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

Back          Edit           Correct        Post          Preview        Hold        Form        Sort By  
Account       Mistakes       Payments       Bill           Bill          Letters      Total
Personal Collections
billlog

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

## billlog

## 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>04/01/03-05/05/13</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>
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</td>
<td>is not billable.</td>
</tr>
<tr>
<td>Catalani, John</td>
<td>(#1092)</td>
<td>Flag #4 held bill.</td>
<td></td>
</tr>
</tbody>
</table>

PCC Pediatric EHR Solutions
ALWAYS link personal payments to specific charges!
Personal Collections

Use your bills cut off balance.

Focus on one aged account at a time.

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

Add the Budget Amt in frame and it appears on personal bills as the due field.
## Personal Collections Persview

### Access Collection via Form Letter

<table>
<thead>
<tr>
<th>Account</th>
<th>Payment Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1&gt; Buchanan, John</td>
<td>802-727-6763, 802-195-1817</td>
</tr>
<tr>
<td>2&gt; Canning, John</td>
<td>802-250-8812, 802-398-3044</td>
</tr>
<tr>
<td>3&gt; Douglas, William</td>
<td>802-512-8802, 802-391-8912</td>
</tr>
<tr>
<td>4&gt; Mcclain, Charles</td>
<td>802-663-2982, 802-391-8912</td>
</tr>
<tr>
<td>5&gt; Total</td>
<td>802-727-6763, 802-195-1817</td>
</tr>
</tbody>
</table>

- **Last payment date includes copays!**
- **Access collection via form letter to see payments.**
- **Print missed payment plan form letter easily.**
- **Jump into oops as needed.**

**PCC**

Pediatric EHR Solutions
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!
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

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>BIL</th>
<th>AMOUNT</th>
<th>SUM</th>
<th>DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>43)</td>
<td>10/20/12</td>
<td>John</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td>95.00</td>
<td>95.00</td>
<td></td>
</tr>
<tr>
<td>44)</td>
<td>08/06/12</td>
<td>C</td>
<td>Well Child 5-11 y V70.0 C C</td>
<td>95.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>45)</td>
<td>08/07/12</td>
<td>C</td>
<td>Claim (from Other) to enbcbs</td>
<td></td>
<td></td>
<td></td>
<td>28.00</td>
<td>28.00</td>
<td></td>
</tr>
<tr>
<td>46)</td>
<td>08/06/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>47)</td>
<td>John</td>
<td>Respiratory Flow 493.81 C C</td>
<td>28.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>48)</td>
<td>08/07/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td>28.00</td>
<td>28.00</td>
<td></td>
</tr>
<tr>
<td>49)</td>
<td>08/06/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50)</td>
<td>John</td>
<td>Spirometry Simple 493.81 C C</td>
<td>70.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>51)</td>
<td>08/07/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td>70.00</td>
<td>70.00</td>
<td></td>
</tr>
<tr>
<td>52)</td>
<td>08/06/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>53)</td>
<td>P</td>
<td>John</td>
<td>Same</td>
<td>737.30</td>
<td>C C</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>54)</td>
<td>08/07/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>55)</td>
<td>08/06/12</td>
<td>C</td>
<td>Other claim batched</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>56)</td>
<td>01/30/12</td>
<td>C</td>
<td>OV Expanded Focus 917.8 G G</td>
<td>208.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57)</td>
<td>03/06/12</td>
<td>C</td>
<td>Ins Pmt Direct Blue #110088 G</td>
<td>279.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>58)</td>
<td>03/06/12</td>
<td>C</td>
<td>Ins Adj Direct Blue #110088 G</td>
<td>279.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59)</td>
<td>02/01/12</td>
<td>C</td>
<td>Claim (from BCBS) to BCBS</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Find the charges

**Personal:** $208.00  Correcting John Canning (#1).

**Insurance:** $279.00  There are 189 more items.

**Medicaid:** $0.00

---

**Hit F4 to pend to the new collection agency insco**
### Personal Collections

**Collections: Pend Agency**

<table>
<thead>
<tr>
<th>Date</th>
<th>ID</th>
<th>Client</th>
<th>Description</th>
<th>Type</th>
<th>Amount</th>
<th>Original Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/06/12</td>
<td>58</td>
<td>PC John Thomas 99393</td>
<td>Well Child 5-11 V70.0</td>
<td>C C</td>
<td>95.00</td>
<td>80.86</td>
</tr>
<tr>
<td></td>
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</table>

**Personal:** $52.10  **Correcting John Canning (# 1).**  **Type item numbers to edit:**

**Insurance:** $482.00  **There are 193 more items.**

**Medicaid:** $0.00  **Type item numbers to edit:**

---

Type in the numbers for the charges going to Collection OR Use the new function keys!
Personal Collections
Collections: Pend Agency

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<tr>
<th>DATE</th>
<th>PATIENT</th>
<th>DATE</th>
<th>PATIENT</th>
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<td>Insurance</td>
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</table>

- Highmark PPO Blue $15
- Select Blue $10
- Direct Blue $10
- Health One $10/10

Some Other Insurance

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

Some Other Insurance allows you to choose any insurance company

1. Collection

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<td>0</td>
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</tbody>
</table>
**Personal Collections**

**Collections: Pend Agency**

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