

Personal Collections

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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

SAM Search Criteria

Name	Visit Reason	PCP	Provider
X Pebbles Flintstone		W	

Time Frame: [] [] [] []

PATIENT: Pebbles Flintstone PAT STATUS: \$\$ Problem, Adopti LAST PHYS: 05/01/12
24/2003 CUST STATUS: CONFIDENTIAL NEXT APPT:
years GUAR STATUS: Billing Problem

Flintstone GUAR: Fred Flintstone
Lane 1400 Rock Road
ki, 05404 Winooski, VT 05404

H: 802-555-194 PERS BAL: \$ 37.00 H: 802-555-0105 PERS BAL: \$ 37.00
W: 802-555-0146 INS BAL: \$ 128.00 W: 802-555-0146 INS BAL: \$ 128.00

PRI: Aetna HDHP \$20 CERT: 34DFJH GRP:
SEC: Cigna PPO \$20 CERT: 2158JD GRP:

School: Bedrock Central SSN: 828-74-6104
Alt Name: Rubble 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

\$ 37.00



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 (cseedit)
 - 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

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 07/10/12	Pay This Amount \$ 607.60	Account # 1213
Pmt Method: MasterCard	Visa	Amex
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

Paul M Acker
453 Spring Road
Proctorsville, VT 05153

Send Payment To:

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
BALANCE 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, 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



Pediatric EHR Solutions

Personal Collections

Personal Statements: Diamond Health

006306 630601 00001268

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 10/24/02

PAY THIS AMOUNT \$ 93.00

ACCT. # 26270

ADDRESSEE: REMIT TO:

Springfield Pediatrics
100 Main St
Springfield, VT 12345

HOMER AND MARGE SIMPSON

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
10/24/02	Maggie Simpson (Dr. Nick Riviera, Office) OV Detailed H&E 10/24/02 Ins Pmt -- Aetna	\$ 85.00	\$ 50.00-	\$ 0.00	\$ 35.00
10/24/02	Julius Hibbert (Dr. Julius Hibbert, Office) OV Problem Focused 10/24/02 Ins Pmt -- Aetna	\$ 48.00	\$ 20.00-	\$ 0.00	\$ 28.00
10/24/02	Julius Hibbert (Dr. Julius Hibbert, Office) OV Expanded Focus 10/24/02 Ins Pmt -- Aetna	\$ 60.00	\$ 30.00-	\$ 0.00	\$ 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

Budget amount appears here if set in fame.

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

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



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

- 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

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

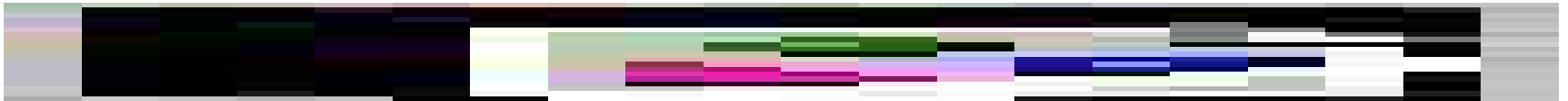
Account Name	Current	30..59	60..89	90..119	120+	Total
<input checked="" type="checkbox"/> Achey, Jeremy	\$ 0.00	\$ 0.00	\$ 0.00	\$ 56.00	\$ 0.00	\$ 56.00
<input type="checkbox"/> Acker, Paul M	\$ 0.00	\$ 0.00	\$ 0.00	\$ 486.60	\$ 121.00	\$ 607.60
<input type="checkbox"/> Acord, Nancy	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 20.00	\$ 20.00
<input type="checkbox"/> 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 billog

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



Personal Collections billog

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 billog

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

Bill Log - Listing of Accounts Billed

	<u>Name</u>	<u>Bill Amount</u>
X	Achey, Jeremy	\$ 147.00
	Acker, Paul M	\$ 639.60
	Acord, Nancy	\$ 20.00
	Adam, Scott L.	\$ 52.00
	Addington, Jeffrey	\$ 207.00

View Bill Sort By Name Sort By Amount



Personal Collections billog

- 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	\$ 26.81	CR is not billable.
Catalani, John	(#1092)	Flag #4	held bill.	



Personal Collections Personal Payments

POSTING PERSONAL PAYMENTS

First Name: John
Last Name: Canning
Status: Payment Plan

Address: 584 Water Street Dependents
John Canning
City: Irasburg
State: VT Zip Code: 05845

AGING:	0-30	31-60	61-90	Over 90	Old Bal	New Bal
Personal:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 30.00	\$ 30.00	\$ 30.00
Insurance:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 457.00	\$ 457.00	\$ 457.00
Medicaid:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Date	Payment/Adjustment Type	Amount	Check #	Provider
07/15/13	Personal Check Payment	\$ 30.00	1234	

ALWAYS link personal payments to specific charges!

Print receipt for this payment

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



Personal Collections persview

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 A

Which Accounts to Include
Review Name Range: A - Z

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 match
 Include if all Account Flags match

Generate Report

Use your bills
cut off balance.

Focus on one
aged account
at a time.

You may wish
to exclude/include
by account flag.



Personal Collections persview

WORKING WITH *INDIVIDUAL* ACCOUNTS

Name	Current	30..59	60..89	90..119	120+	Total
X Achey, Jeremy	\$ 56.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 56.00
Acker, Paul M	\$ 505.60	\$ 102.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 607.60
Acord, Nancy	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
Adam, Scott L.	\$ 0.00	\$ 52.00	\$ 0.00	\$ 0.00	\$ 0.00	
Adams, Herb	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
Addi	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
Afto	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 60.00
Albe	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 10.00	\$ 10.00
Alt1	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 76.00	\$ 76.00
Alviani, Michael	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 293.00	\$ 293.00
Anderson, Debra	\$ 31.96	\$ 0.00	\$ 0.00	\$ 1.80	\$ 43.20	\$ 76.96
Andrews, Josephine	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 150.00	\$ 150.00
Angle, Wensheng	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 30.00	\$ 30.00
Annunziata, Kimber	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 92.00	\$ 92.00
Archer, Brad	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 112.00	\$ 112.00

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

Work With All lets you run commands for all accounts listed

Main Menu

Edit Account

Refund

Pam

Daysheet History

Form Letters

Print One Bill

Work With All



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

Main Form Letters Print Bills See Totals

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

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 10/24/02

PAY THIS AMOUNT \$ 93.00

ACCT. # 26270

SHOW AMOUNT PAID HERE

ADDRESSEE: REMIT TO:

Springfield Pediatrics
100 Main St
Springfield, VT 12345

HOMER AND MARGE SIMPSON

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

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



Personal Collections persview

ACCOUNT	CURRENT	30..59	60..89	90..119	120+(days)
1> Buchanan, John	802-727-6763	802-195-181			
2> Canning, John	802-250-8812	98			
3> Douglas, William	802-512-8802	391			
4> McClain, Charles	802-663-2982				
5> TOTAL					

Payment Plan

PHONE LBL 1 PHONE LBL 2

LAST PAYMENT

\$ 136.00 11/20/12

\$ 208.00 06/05/13

\$ 45.00 03/07/05

\$ 90.00 01/27/13

\$ 479.00

Start of List Jump Lett Form Letters Oops Account View Account

Last payment date includes copays!

Access coll via fame to see pmts.

Jump into oops as needed.

Print missed payment plan form letter easily.



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 Page 1 of 2

First Name: John Phone Lbl 1: 802-250-8812
Last Name: Canning Phone Lbl 2: 802-335-5981
Status: Payment Plan
Address: 584 Water Street Depend John Canning
City: Irasburg
State: VT Zip Code: 05845

	0-30	31-60	61-90	Over 90	Old Bal	New Bal
Personal:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 208.00	\$ 208.00	\$ 208.00
Insurance:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 279.00	\$ 279.00	
Medical:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	

Date	Payment/Adjustment Type	Amount	Check #
07/15/13	BadDebt/Collection	\$ 208.00	

Print receipt for

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

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 Item Generate Claim SeeClaim Rpt/Bill **Insurance Status** Visit Status Unlink & Relink View Adj Reasons Delete 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 Claim ID Enter Date

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



Personal Collections

Collections: Pend Agency

Changing Insurance Information Page 1 of 1
John Canning

DATE	PATIENT		SUM DUE
44 08/06/12	C John	+ Highmark PPO Blue \$15	95.00
	Insurance	- Select Blue \$10	
		- Direct Blue \$10	
47 08/06/12	John	- Health One \$10/10	28.00
	Insurance	Some Other Insurance	
50 08/06/12	John		70.00
	Insurance:	<input type="text"/>	Copay: <input type="text"/>

Some Other Insurance allows you to choose any insurance company

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

Changing Insurance Information
John Canning

1. Collection	UE
Aetna EPO \$10 Box 91522/P.O. Box 91522/Arlington/TX/76015-0022	00
Aetna EPO \$15 Box 91522/P.O. Box 91522/Arlington/TX/76015-0022	
Aetna MC \$10 Box 1125/P.O. Box 1125/Blue Bell/PA/19422	00



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
	Insurance:	1. Collection			Copay:		
50 08/06/12P	John	Spirometry Simple 493.81		C	C	70.00	70.00
	Insurance:	1. Collection			Copay:		

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.

