Personal Collections Best Practices

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Burlington, VT
Goals

1. Learn how the whole office can capitalize on opportunities
2. Identify tools to assist on buy in from the practice
3. Get everyone on the same page and stick to it
Personal Collections: Pre-Visit

The process 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

The Financial Policy

- Develop a financial policy to share with parents
- Develop guides to educate patients about guarantor responsibilities and personal balances
- Develop internal guidelines and policies to empower your staff on when to say yes, and how to say no
- Seriously consider promoting an Auto-Pay policy where your office keeps credit cards on file and making this part of your financial policy
Personal Collections: Make Collecting Easy

**Define your process and track it**

- Share and update your external financial policy with families at least once a year.
- Track pain points between staff and how you use your internal policies, these should also be reviewed and agreed upon yearly.
- Are economic hardships a part of your internal policy? Have paperwork a family can sign to track special circumstances.
- Stick to it!!! If you do not get buy in from all staff then families won’t be confident they are all getting the same financial treatment.
Personal Collections: Pre-Visit

When Does the Collection Process Start?

- Scheduling: verify demographics, review billing flags, check current balances, ask for assistance from your billing staff
- Appointment Verification: are demographics still current? Remind families of past due balances and expected copays, is your insurance card up to date?
- Billing Department Prep: are you prepared to have front office staff transfer families to you? How much do you handle before sending them back to the scheduler?
Personal Collections: Pre-Visit

Scheduling

Clinical Alert: Copy Insurance Card
Clinical Alert:
Please make a scan of this patient's insurance card

Account Information
Account Flags:
EMG Contact:
EMG Phone #:
Alt Last Name:
Mother Employer:
Father Employer:
Pharmacy #:

Recent Financial History
Last Service: 04/08/18
Last Bill Sent: 02/13/18
Last Pers. Pmt: 04/08/18
Last Ins. Pmt: 04/27/18
Hold Bill Until:
Budget Amt:

Policies

<table>
<thead>
<tr>
<th>Insurance</th>
<th>Copay</th>
<th>Certificate</th>
<th>Group</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Assurance COPPO S15</td>
<td>$15.00</td>
<td>850543637-01</td>
<td>Her71</td>
<td>06/26/16</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>

PCC
Pediatric EHR Solutions
Personal Collections: Pre-Visit

Appointment Verification

Points to make during appointment verification

- Verify date, time, and visit reason
- Remind patient of expected copays, outstanding balances, and insurance cards
- Not all staff is comfortable discussing financial materials on the phone, having a script is ok, deferring the phone call to billing is ok. What’s best for YOU should be the policy

Accurate review of the above improves

- Collection time, bad address returns, and reminder call success rates
### Account Balances

<table>
<thead>
<tr>
<th>Aging</th>
<th>0-29 days</th>
<th>30-59 days</th>
<th>60-89 days</th>
<th>90-119 days</th>
<th>120+ days</th>
<th>Credit</th>
<th>Total Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Georgia Herr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>496.00</td>
</tr>
<tr>
<td>Personal</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>496.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td>0.00</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></td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Encounters with Outstanding Personal Balances**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Charge</th>
<th>Payment/Adj</th>
<th>Insurance Due</th>
<th>Medicaid Due</th>
<th>Personal Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/02/17</td>
<td>OV Expanded Focus</td>
<td>56.00</td>
<td>32.44</td>
<td>0.00</td>
<td>8.56</td>
<td>15.00</td>
</tr>
<tr>
<td>11/17/17</td>
<td>Ins Pmt - Health Assurance CCPPO $15</td>
<td>11/17</td>
<td>32.44</td>
<td>0.00</td>
<td>8.56</td>
<td>15.00</td>
</tr>
<tr>
<td>11/17/17</td>
<td>Ins Adj - Health Assurance CCPPO $15</td>
<td>11/17</td>
<td>32.44</td>
<td>0.00</td>
<td>8.56</td>
<td>15.00</td>
</tr>
<tr>
<td>11/02/17</td>
<td>Hemocult</td>
<td>7.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>11/17/17</td>
<td>Ins Pmt - Health Assurance CCPPO $15</td>
<td>11/17</td>
<td>3.32</td>
<td>0.00</td>
<td>0.00</td>
<td>3.32</td>
</tr>
<tr>
<td>11/17/17</td>
<td>Ins Adj - Health Assurance CCPPO $15</td>
<td>11/17</td>
<td>3.32</td>
<td>0.00</td>
<td>0.00</td>
<td>3.32</td>
</tr>
<tr>
<td>01/28/18</td>
<td>Personal Check Payment - Personal</td>
<td>63.00</td>
<td>48.00</td>
<td>0.00</td>
<td>0.00</td>
<td>15.00</td>
</tr>
</tbody>
</table>
Personal Collections: The Front Desk

Set Expectations

- The best time to collect is face to face

What is due at TOS?

- Copays
- Deductibles
- Current and accurate policy and demographic data
- Auto-Pay options and paperwork
- Self-Pay options and explanation / estimate sheets (laminated and available)
Personal Collections: The Front Desk

Collect at Time of Service

- Expecting Vs. Collecting
- Trust staff but verify compliance
- Expectations are for everyone
- Incentivize your staff, find value, and set goals
- Track progress
### Copay Collection Ratio

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Copay</th>
<th>Amount of Copay Paid</th>
<th>Copay Collection Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/18</td>
<td>$30.00</td>
<td>$26.13</td>
<td>87.10%</td>
</tr>
<tr>
<td>01/02/18</td>
<td>$50.00</td>
<td>$30.00</td>
<td>60.00%</td>
</tr>
<tr>
<td>01/03/18</td>
<td>$25.00</td>
<td>$25.00</td>
<td>100.00%</td>
</tr>
<tr>
<td>01/04/18</td>
<td>$195.00</td>
<td>$185.00</td>
<td>94.87%</td>
</tr>
<tr>
<td>01/05/18</td>
<td>$205.00</td>
<td>$190.00</td>
<td>93.68%</td>
</tr>
<tr>
<td>01/06/18</td>
<td>$458.50</td>
<td>$458.50</td>
<td>100.00%</td>
</tr>
<tr>
<td>01/07/18</td>
<td>$115.00</td>
<td>$110.00</td>
<td>95.65%</td>
</tr>
<tr>
<td>01/08/18</td>
<td>$245.00</td>
<td>$235.00</td>
<td>95.92%</td>
</tr>
<tr>
<td>01/09/18</td>
<td>$65.00</td>
<td>$35.00</td>
<td>53.85%</td>
</tr>
<tr>
<td>01/11/18</td>
<td>$350.00</td>
<td>$315.00</td>
<td>90.00%</td>
</tr>
<tr>
<td>01/12/18</td>
<td>$355.00</td>
<td>$355.00</td>
<td>100.00%</td>
</tr>
<tr>
<td>01/13/18</td>
<td>$441.80</td>
<td>$441.80</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Personal Collections: The Front Desk

Collect at Time of Service

- Use what you know
- Morning huddles are important for front staff, not just clinical
- Be accountable for all expected collections
- Integrate as an end of work day task
### Personal Collections: The Front Desk

#### Collection Worksheet

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Provider of Service</th>
<th>Place of Service</th>
<th>Personal Due</th>
<th>Comments</th>
<th>Today’s Charges</th>
<th>Total Owed</th>
<th>Total Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/19/19</td>
<td>9:30am</td>
<td>Flintstone, Dino</td>
<td>Winooski Pediatrics</td>
<td>$ 30.89</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>10:00am</td>
<td>Flintstone, Pebb</td>
<td></td>
<td>$ 30.89</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>10:15am</td>
<td>Simpson, Bart</td>
<td></td>
<td>$ 30.89</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>11:30am</td>
<td>Baker, Alisa N.</td>
<td></td>
<td>$ 56.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>12:00pm</td>
<td>Herr, Cody B</td>
<td></td>
<td>$ 496.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>1:00pm</td>
<td>Herr, Jane</td>
<td></td>
<td>$ 496.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>2:15pm</td>
<td>Harvey Sr., Rica</td>
<td></td>
<td>$ 36.73</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>3:30pm</td>
<td>Boise, Kristen L</td>
<td></td>
<td>$ 149.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/19/19</td>
<td>4:30pm</td>
<td>Kienzle P.C, Ash</td>
<td></td>
<td>$ 426.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Personal Collections: The Front Desk

Insurance Eligibility

- Use notes for front desk to see during checkin
- Verify insurance card is up to date
- Have an estimate worksheet for self-pay available at front desk
## Eligibility

<table>
<thead>
<tr>
<th>Time</th>
<th>Patient</th>
<th>Insurance Group</th>
<th>Response Date</th>
<th>Coverage Status</th>
<th>Verification Status</th>
<th>Verification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:30am</td>
<td>Flintstone, Dino</td>
<td>Aetna HDP</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>10:00am</td>
<td>Flintstone, Pebbles</td>
<td>Aetna HDP</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4:16pm</td>
<td>Lingle, Gavin</td>
<td>BCBS</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>11:30am</td>
<td>Baker, Alisa M.</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:00pm</td>
<td>Meyer, Nicole</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:15pm</td>
<td>Harvey Sr., Ricardo 'Luke' Keith</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:30pm</td>
<td>Meyer Jr., Lauren ‘Chris’ Elizabeth</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:45pm</td>
<td>Meyer, Michael</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3:30pm</td>
<td>Bloore, Kristen L.</td>
<td>Blue Shield</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4:30pm</td>
<td>Kinzie P/C, Ashley 'John' Wayne</td>
<td>Cap BC</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>10:00am</td>
<td>Purcell III, Jack &quot;Westley&quot; Martin</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>10:30am</td>
<td>Purcell, Nicole</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>11:00am</td>
<td>Supinski Sr., Hannah 'Robbie' Brooke</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>11:30am</td>
<td>Supinski, Dawn</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>1:00pm</td>
<td>Herr, Cody B</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>1:30pm</td>
<td>Herr, Jane</td>
<td>Health Assurance</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:00pm</td>
<td>Wignar, Hannah</td>
<td>Keystone HealthPlan</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2:15pm</td>
<td>Simpson, Bart</td>
<td>Medicaid</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>9:30am</td>
<td>Dockendorf, Hope W</td>
<td>Self Pay</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3:30pm</td>
<td>Harris II, Amanda 'Abby' Angel</td>
<td>Self Pay</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3:45pm</td>
<td>Harris, Summer</td>
<td>Self Pay</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Personal Collections: The Front Desk

Insurance at Checkin

- New card? Scan the front and back, both can be important
- Have accurate policy details
- New calendar year? Ask “Did you receive a new insurance card?”
### Personal Collections: The Front Desk

#### Policies

**Patient Check-In**

- **Name:** Cody B Herr
- **PCP:** None
- **Visit:** 07/19/19 1:00pm
- **Duration:** Elizabeth Mary Casey, MD
- **Insurance Eligibility**

**Health Assurance CCPO $15**
- **Copay:** $15.00
- **Certificate:** 850543637-01
- **Group:** Her71
- **Subscriber:** Georgia Herr
- **Pt. Relationship to Subscriber:** Son
- **Date of Birth:** 06/19/67
- **Sex:** Male
- **Employer:**
- **Payer ID:** 25126
- **Ins. Notes:**
- **Status:** Active

**Health Assurance CCPO $15**
- **Copay:** $15.00
- **Certificate:** 066882241
- **Group:** Her633
- **Subscriber:**
- **Date of Birth:** 06/19/67
- **Sex:** Male
- **Employer:**
- **Payer ID:** 25126
- **Ins. Notes:**
- **Status:** Expired

**Health Assurance Healthstyes $10**
- **Copay:** $10.00
- **Certificate:** 066882241
- **Group:** Her244
- **Subscriber:**
- **Date of Birth:** 06/19/67
- **Sex:** Male
- **Employer:**
- **Payer ID:** 25126
- **Ins. Notes:**
- **Status:** Expired

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Personal Collections: The Front Desk

Multitasking Fallacy

- “Switchtasking” decreases productivity
- Sometimes more than double the effort
- Quality decreases
- Stress of staff increases
Personal Collections: The Front Desk

Checkin

- Front desk can answer a family’s questions
- Details are available on past due personal balances
- TOS payments and receipts are available in checkin
- Be available to answer questions or have billing support you
Personal Collections: The Front Desk

Helpful is Important

- Decide who answers detailed questions and stick to it!!!
- Be available!
Personal Collections: The Front Desk

Self Pay Configuration

- Set up a self pay policy configuration to include TOS discounts
- Have an explanation sheet and range of discounted charges available for discussion with non-insured patients
- Discuss the pros of paying at time of service and receiving a discount
Personal Collections: Personal Statements

- The Patient Portal
- “Auto-Pay”
- ebills Vs. bills
- Cycle billing
- Billing messages
- Find bills sent in the past
Personal Collections: Patient Portal

Make Payments Easy

- The Patient Portal
  1. See current balances in the patient portal
  2. Display all charges while retaining privacy
## Personal Collections: Patient Portal

### Personal Balance as of 05/03/19

<table>
<thead>
<tr>
<th>Provider</th>
<th>Total Charge</th>
<th>Payments/Adjustments</th>
<th>Pending Insurance</th>
<th>Personal Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fred Flintstone</td>
<td>$79.00</td>
<td>$0.00</td>
<td>$64.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Dino Flintstone (Privacy Enabled) 11/27/18</td>
<td>$79.00</td>
<td>$0.00</td>
<td>$64.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Pebbles Flintstone (Dr. Davidson, Winoski) 1/27/18 - OVP Expanded Focus</td>
<td>$79.00</td>
<td>$0.00</td>
<td>$64.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Dino Flintstone (Privacy Enabled) 04/22/19</td>
<td>$30.00</td>
<td>$0.00</td>
<td>$15.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Pebbles Flintstone (Dr. Casey, Winoski) 04/22/19 - OVP Minimal</td>
<td>$30.00</td>
<td>$0.00</td>
<td>$15.00</td>
<td>$15.00</td>
</tr>
</tbody>
</table>

This is not a bill and may not reflect the entire account balance.

Make a Payment
Personal Collections: Patient Portal

Make Payments Easy

- Patient Portal Payments
  1. Variety of payment types available
  2. Save multiple cards; credit, debit, HSA, any that use standard CC processing
  3. Security: You do not store the credit cards on your PCC server. Due to our partnership with Payments Pro’s they store all credit card information in a PCI compliant environment for you.
Personal Collections: Patient Portal

Credit card data is never stored on PCC servers. Saved cards are hosted by our PCI-compliant partner, BluePay.

Defaults to current balance but may be changed to any amount.
Personal Collections: Automatic Balance Collection

Make Payments Easy

- Promote online bill pay and auto-payment options
- If patients can pay via your website then highlight this on personal bills
- If you keep credit cards on file then promote this as an auto-payment option
- Remove automatic bills in favor of automatic balance collection
- Have a 7 day letter for credit cards on file collection (Auto-Pay)

https://kidspluspgh.com/payments/kids-autopay/
Personal Collections: Budget Plans

Setting up a Budget Plan

- Create a form letter explaining their responsibilities
- Update budget field in the family editor
- Give the account a flag so you can easily review the accounts on a payment plan and verify they are paying
- Have a set internal policy on the boundaries of a budget plan.
- Have the entire practice know and review the internal financial policy criteria and revisit it yearly.
Personal Collections: Budget Plans

Setting up a Budget Plan

- Add budget amount and it appears on personal bills as the amount due field
## Personal Collections: Budget Plans

### Setting up a Budget Plan

- Have personal messages, office messages, and payment websites go out on your bill.

<table>
<thead>
<tr>
<th>PCC Pediatric Test Associates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thank you for entrusting your children to our office.</strong></td>
</tr>
<tr>
<td><strong>Billing Date</strong></td>
</tr>
<tr>
<td>07/02/19</td>
</tr>
<tr>
<td><strong>Pmt Method:</strong></td>
</tr>
<tr>
<td><strong>Card#:</strong></td>
</tr>
<tr>
<td><strong>Sig:</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**NOTICE:**

You are currently on a monthly budget plan of $50.00, thank you for working with us.

Pay your bill online at: [www.pcc.com/payments](http://www.pcc.com/payments)

**Budget Amount:** $ 50.00

---

**Send Payment To:**

PCC Pediatric Test Associates  
20 Winooski Falls Way  
Suite 7  
Winooski, VT 05404-2228  
(800) 722-1082

---

Raymond DeFrank  
Mhs Box 046  
Starksboro, VT 05487

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Pediatric EHR Solutions
Personal Collections: Personal Statements

Ebilling
- Looks more professional
- Submit electronically
- 76¢ per bill and 19¢ for each additional page. (This includes postage)

Vs. Bills
- Plain printing, nothing fancy
- Print in your office
- Folding, stuffing, stamping and time costs
- More control
- Consider using colored paper for delinquent bills
Personal Collections: Personal Statements

Billing Cycle

- Send out bills weekly instead of monthly
- Personal bills come in all month and not all at once
- Set cycles to 28 days and never print a duplicate bill on off weeks
- Breaking up the bills gives billers more time for other tasks
Personal Collections: Personal Statements

Billing Messages (billmsg)

Practice Management

+ Session 1

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

Partner Cycle Billing

- Set your cycle to 28 days
- Run bills weekly
- SRS support - Claims never submitted (Personal only)
- Auto-Flagging - Have letters flag accounts that receive them
- When does an account get a bill?
Personal Collections: Prioritize Balance Follow Up

Two Meanings of Prioritize

1. Prioritize your accounts
   ● Put accounts in the order you want to resolve them
   ● Sort by amount, age of bill, by flag, or a combination of choices
   ● Have explanation letters based on flag like COB denials

2. Prioritize based on your internal policies!
Personal Collections: Bills Program

Work with accounts to review your bills before printing or submitting

Function keys allow for a variety of updates before mass printing bills
Personal Collections: Bills Log

Billlog (F8 in bills) allows research of previously sent bills
Personal Collections: Bills Log

Accounts billed lets you see

- Who received a bill
- Includes bill amount
- View actual bill sent (F1)
- Sort by name or amount
Personal Collections: Bills Log

Accounts not billed lets you see

- Who did not receive a bill
- Why they did not get a bill
- Searchable accounts by name

Practice Management

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Total bal</th>
<th>is not billable.</th>
<th>below cutoff</th>
<th>CR below cutoff</th>
</tr>
</thead>
<tbody>
<tr>
<td>WILSON, FDB</td>
<td>#4052</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wilt, Peter</td>
<td>#504</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wingard, Robert</td>
<td>#1385</td>
<td>$0.00</td>
<td>below cutoff $ 0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winsett, Don</td>
<td>#456</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wise, Eric</td>
<td>#171</td>
<td>$20.00CR</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Personal Collections: Persview

When You Need to Bill One Account at a Time

- Use your bills cutoff balance
- Focus on one aged account at a time
- Include / Exclude by specific flag
Personal Collections: Persview

Working with *INDIVIDUAL* accounts

- Many function keys help you review each account
- Work with all lets you run commands for all accounts listed
Personal Collections: Persview

Working with *ALL* accounts

- Print a bill for every account on the list
- Use form letters to automatically add flags to each account and print a letter
Personal Collections: Special Accounts Editor (cfs)

Reviewing Flagged Accounts

- Print form letters easily
- Jump in correct mistakes as needed
- Access collection reports
- Update demographics
- Last payment include copays!

Practice Management

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>CURRENT</th>
<th>30..59</th>
<th>60..89</th>
<th>90..119</th>
<th>120+(days)</th>
<th>LAST PAYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Cramer, Gillian</td>
<td>&lt;o&gt;</td>
<td>802-555-8127</td>
<td>$56.00</td>
<td>02/02/18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Jetson, George</td>
<td>&lt;o&gt;</td>
<td>802-555-8190</td>
<td>$56.00</td>
<td>$82.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Seinfeld, Morty</td>
<td>&lt;o&gt;</td>
<td>802-555-8124</td>
<td>$85.00</td>
<td>$87.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Start of List | Jump to Letter | End of List | Form Letters | Oops Account | View Account |
Personal Collections: Notify

Notify Allows You to Send Overdue Personal Account Balance Notifications

- “Hello this is [Pediatric Practice] 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: When All Else Fails...

Collection Referrals

- Revisit your internal policy for massively overdue accounts
- Do you write off balance under a certain amount?
- What flags do you generate?
- Do you refer an account to a collection agency?
- What is your pre-collection policy?
- Do you have an existing agency?
- Do you dismiss a family for delinquency?
Personal Collections: When All Else Fails...

To refer, or not to refer?

- Define delinquency thresholds in internal and external policies
- Do you send to collections for nonpayment alone?
- Does lack of contact carry the same penalties?
- Do you have a budget plan option? What are the upper limits?
Personal Collections: When All Else Fails...

Collections

When sending an account to a collection agency you have two options

1. Adjust off charges
2. Pend charges to agency

Regardless of the option you choose

- Print charge information for collection agency
- Have a custom report to run with collection details
Personal Collections: When All Else Fails...

Adjusting Off Charges to Collections

Run Post Personal Payments (pam)

- Find Account
- Post bad debt / collection adjustment and link to delinquent charges
- Do you post an additional collection fee? Make this part of your financial policies, both internal and external.
- Add collection flag to account
- Update Account notes
Personal Collections: When All Else Fails...

Adjusting Off Charges to Collections

- Post Adjustment
- Link adjustment to delinquent charges
- Add collection flag and account note
Personal Collections: When All Else Fails...

Collection Agency Follow Up

When you receive a payment from the collection agency do one of the following:

- Delete the bad debt adjustment and post the payment using a collections payment type.
- Post a “collection income” adjustment in the refund program then post a collection payment against it.

Did the family pay the office directly? Make sure to contact the collection agency.
Personal Collections: When All Else Fails...

Write Offs

When you are not referring to a collection agency

- Write off all balances beyond reason
- Flag the accounts
- Review flagged accounts annually when reviewing your internal financial policy
Personal Collections: Reporting

**Smart Report Suite (srs)**

- Billing & Collection Reports (Category)
- Accounts with Credit Balances
- Collection Worksheet for Appointments
- Copay Collection Ratio
- Insurance Eligibility
- Insurance Eligibility for Same Day Appointments
- Claims Never Submitted (Personal & Self Pay plans only)
Personal Collections: Review

Personal Collections Tasks

- Send personal bills
- Post payments
- Work personal A/R
- Work with collections
- Run collection reports
Personal Collections: Wrap Up

Take a minute to identify from this course at least ONE To Do item you’ll commit to completing when you return to your office.
Personal Collections: Takeaways

Today you learned:

1.
2.
3.