Personal Billing and Collections in Partner

PCC

Pediatric EHR Solutions

1. Personal Billing Overview

Partner has a wide range of tools that help you keep your personal A/R under control. From collecting copays and generating bills, to bill follow-up and sending accounts to collections, Partner tools can make you more productive.

Collecting personal balances can be broken down into five simple steps:

Step 1: Collect the Payment and Information at the Time of Service

There is no better time to collect a personal balance than while the patient is still in your office. Use Partner tools like **apptsheet**, **checkin**, and Partner's different insurance eligibility features to ensure that you collect the correct copay at the time of service. Older account balances can also be added to the encounter form and are visible in **checkin** and other programs. Everything you collect while the patient is still in the building saves you time and money.

Collecting *information* at the time of service is just as important as collecting money. Charges will be billed incorrectly if your staff hasn't collected the correct insurance information. If your demographic information is incorrect, you may never be able to bill for your services. Use **checkin**, **checkout**, and other tools to make sure billing information is confirmed at every visit.

Tip: Have your families review and sign a financial policy that is annually reviewed by your billers, managers, and the owners of your practice. A good financial policy encourages families to remember that they are ultimately responsible for all of their charges.

Step 2: Generate Bills

Use the **bills** program to generate your personal bills. Whether you print and mail your paper bills in the office or send them to a remote printing service, Partner's billing engine has numerous tools and features that can make your collection process more efficient. When you run your bills, you can use automatic or manual cycle billing. You can create custom messages that appear on bills of different aged receivables. You can also review and work on a list of people who need bills before generating them.

Step 3: Follow Up on Outstanding Bills

Use the **persview** program to work down old, outstanding personal bills. **persview** will help you isolate troubled accounts, research balances, send out reminder letters, and write off bad debt. The collection report (**coll**) provides full details about outstanding balances for a specific account. Using status flags along with the **cfs** report will also help you track problem accounts.

Step 4: Post Payments

Post personal payments and link them to specific charges in the Post Personal Payments (**pam**) program.

Step 5: Send Accounts to Collections

> The final step is to turn delinquent accounts over to collections. There are different methods for doing this in Partner, depending on whether you want to leave the outstanding balance on the patient's account or not. You can adjust off collection charges, or you can pend the balance to the collection agency (using **oops**). Don't forget to mark collection accounts with an appropriate status flag for reporting and tracking.

In this manual you can learn how to generate bills, work your outstanding bills, post payments, and send overdue accounts to collections. Contact us with any questions at 800-722-1082 or `<support@pcc.com>`.

2. Generate Bills: The Bills Program

The **bills** program generates personal bills for your accounts quickly and efficiently. It has many configurable options and can be run in several different ways. From within the **bills** program you can also add a customized billing message to your bills and review the list of bills waiting to be generated.

If you print your bills on paper and mail them in-house, you run the **bills** program. If you have Partner send your personal bills out electronically, printed and mailed by a third party, you use the ebills (**ebs**) program. Both of these programs work the same way.

Note: PCC encourages all clients to consider electronic personal billing. When printing, packaging, and mailing costs are considered, many practices discover that electronic billing saves both time and money while producing bills of a more professional quality.

2.1. Quickstart: Send Personal Bills

Follow this procedure to print or generate the outstanding bills for your office:

Step 1: Run Bills

Select **bills** or **ebs** from the "Personal Billing" section of the "Billing Functions" window in Partner's windows. You can also type **bills** or **ebs** at a command prompt.

Step 2: Press [F1 -- *Make Changes*]

When you first run **bills** or **ebs**, you will see the settings that were used the last time you ran the program. Press **F1** to make changes.

Step 3: Update the "End" Date

Change the "End" date so it indicates today's date. Otherwise, your bills will not take into account the most recent charges and payments. The start date will indicate how far back you wish to display detail about the account's balance. Anything prior to that date will appear on the bill as a "Previous Balance."

Step 4: Optional: Add Other Bill Criteria

If you wish, use the other fields on the screen to limit what bills will be generated. See *Your Office's Billing Cycle* for more details.

Step 5: Press [F1 -- *Save Changes*]

Step 6: Press [F2 -- *Prepare Bills*]

Partner will gather charge and payment information and prepare the bills. This may take a while, as Partner must review the balances for all outstanding accounts.

Step 7: Optional: Review Results

When you are returned to the billing screen, you will see a "Messages" section on the bottom telling you how many bills are in the batch waiting to be generated:

```
Messages:

      I am prepared to print 445 bills.
          44 Regular Bills
         219 Accounts Overdue   30 Days
         100 Accounts Overdue   60 Days
          41 Accounts Overdue   90 Days
          41 Accounts Overdue  120 Days
```

If you wish, press [**F7** -- *Show BillList*] to review what families are waiting in this current batch of bills. Read the *Review Accounts With Bills* section for more information.

If you leave the **bills** program to work on those accounts, remember to press [**F1** -- *Make Changes*], save, and press [**F2** -- *Prepare Bills*] to re-prepare the bills when you return. Repeating those steps ensures that any changes you made to account balances are reflected in the bills you generate. If you don't re-prepare, you will print the same batch of bills you originally prepared.

Step 8: Press [F3 -- *Print Bills*]

When you are ready to generate your bills, press [**F3** -- *Print Bills*]. If you are running **ebs** for electronic bills, press [**F3** -- *Submit Bills*].

Function Keys in bills and ebs

[**F1** -- *Make Changes*]

Press [**F1**] to change items on the main **bills** screen. You should *always* change the end date.

[**F2** -- *Prepare Bills*]

Press [**F2**] to prepare a batch of bills based on the screen criteria.

[**F3** -- *Print Bills/Submit Bills*]

Press [**F3**] to print or send your bills electronically, depending on the program you are running. This function is only available once you have prepared a batch of bills.

[**F5** -- *Print One Bill*]

Press [**F5**] to print a single bill for a single account.

[**F6** -- *Edit Bill Msg*]

Press [**F6**] to review or change your batch billing messages.

[**F7** -- *Show BillList*]

Press [**F7**] to display a bill list of everyone currently prepared to receive a bill.

[**F8** -- *Discard Changes*]

While making changes to the bill criteria, press [**F8**] to discard your changes and return to the main **bills** screen.

2.2. Generate One Bill

In addition to the "batch" bill printing, you can also generate a single bill for any family:

Step 1: Run the Bills Program

Step 2: Press [F5 -- *Print One Bill*].

Step 3: Find the Family that Needs a Bill

Step 4: Enter a Date Range for the Bill

Step 5: Press [F1 -- *Print Bills*] to Print the Bill

2.3. Use Cycle Billing to Generate Some Bills

You can use cycle billing to spread your bills out throughout a month or other period of time. With cycle billing, your revenue and billing workload will stretch throughout the month.

Some offices prints current (or "normal") bills on the first of the month and then print overdue bills on the fifteenth. Some offices perform a bill run weekly, based on the family's last name. Other offices print bills every week or every day and have Partner automatically find every account with a balance that has not received a bill within 30 days. These are all different types of cycle billing.

You can control your billing cycle manually or automatically.

2.3.1 Manual Cycle Billing

You can manually control your billing cycle by changing the criteria options on the **bills** screen. Using the criteria options, you can limit: the age of bills to print, what zip codes will print, or what part of the alphabet will print. For example, perhaps you send "Normal" bills at the first of the month using the **ebs** program, and then you run **bills** the following week to print all overdue bills in-house. You could do this by changing the "Normal?" and "Overdue...?" questions on the **bills** and **ebs** screens.


```
Print these bills:
          Normal?  No
 Overdue  30 days?  Yes
 Overdue  60 days?  Yes
 Overdue  90 days?  Yes
 Overdue 120 days?  Yes
```

Similarly, you can control your billing cycle manually by printing a certain zip code or alphabet range at different times during the month. Set all of these options when you press [**F1** -- *Make Changes*] before preparing your bills.

2.3.2 Automatic Cycle Billing

The other way to control your billing cycle is to let Partner calculate which families should get a bill. Once you tell Partner how often an overdue account should receive a bill (28 days, for example), you can run your bills every day (or at any interval) and everyone who is due for a bill will receive one.

Activating an automatic billing cycle and running **bills** weekly (for example) can lead to faster and more efficient collections. Accounts will receive a bill within a week of their visit and they will never accidentally receive more than one bill within a cycle. An added advantage is that your billing workload and income from personal bills will be evenly divided throughout the month (or whatever your cycle length).

First, set how often you would like families with balances to receive a bill (every 28 days, for example). PCC can help set this up for you, or you can change it yourself in the Personal Billing section of the Configuration Editor (**ced**):

```
5. Use a how-many-day cycle for Cycle Billing (0 for no cycle bills)? 28
```

Once automatic cycle billing is turned on, your office can run **bills** weekly (or at any interval shorter than the cycle) for all families and all ranges. Partner will check all outstanding balances and only generate a bill if the family has not received a bill for 28 days (or other interval). If a family visits again or accrues new charges, they will be bumped out of the cycle and will receive a bill immediately.

2.4. Review List of Accounts that Will Be Billed

After preparing your bills, you might press [**F7** -- *Bill List*] to review the list of every account about to get a bill. This report, which can be sent to the screen or a printer, lists accounts grouped by billing category.

To use **billlist** successfully, you must consider *when* you are running it. If you run **billlist** before you prepare your bills, the list will be empty (or based on the last time bills were prepared). If you print **billlist**, make changes to the accounts, and then re-prepare your bills, the list you printed will be out of date. Finally, if you wait until *after* you print bills, your list will be blank because no accounts will need bills. For these reasons, you should follow this procedure:

Step 1: Run the bills Program

 Step 2: Set Billing Criteria

Press [**F1** -- *Make Changes*] and update the "End" date as described in the **bills** procedure.

 Step 3: Press [F2 -- *Prepare Bills*]

There will be a pause as Partner prepares the bills.

Step 4: Press [F7 -- *Bill List*] to Review the Accounts

You will be asked if you want the list sent to your screen or to the printer.

Once you have the list, you can exit the **bills** program and make changes to various accounts or write off faulty balances. *Remember to repeat the steps above to re-prepare your bills when you return.*

Step 5: Press [F3 -- *Print Bills*].

Here is a sample **billlist** report:

```
      Page Up                    F12                   Page Down
2004-06-16 11:39        People To Receive Normal Bills    Page    1


Tisby, Thomas, (#17205)        54 Autumn St             $  82.50
Harrod, Demetra (#17679)       118 Jersey St            $ 396.40
Wences, Lola (#19054)          34 Rainbow Terrace        $ 247.00
Deroy, Rory (#20763)           12 Grove St              $  35.00
Sparrow, Ta'Destiney (#19600)  4 Turner St              $ 239.00
Mccrimmon, Ishmel (#11636)     40 Beaver St 2 Flr        $ 140.00
Justice, Eddie (#7923)         23 Purchase St, 2Nd Floor $  44.00
Crumpton, Rena (#15311)        29 Summit Street          $  31.00
Ganey, Tajh (#18462)           RR 1 Box 24              $ 929.65
Mauldin, Nakaja (#15357)       44 Irving St             $  13.00
Ganas, Tajanna (#14188)        18 Gardner St 1St Fl      $ 458.95
```

2.5. Bill Messages

A billing message is a brief note that appears on a personal bill. Both paper and electronic bills can include a customized billing message. You can enter a family-specific billing message on the notes page of the Family Editor (**fame**). You can also use the **billmsg** program to change the billing messages that appear on all of your Normal, 30, 60, 90 and 120-day bills. Here are a few examples of messages that offices use:

- New Provider: "We would like to welcome Dr. Smith to our practice!"

- Open House: "Come see our new facilities at 10 Main St. from 9am-4pm."

- Credit Card Payments: "We now accept VISA card payments."

In addition to these general messages, you can also include messages specific to each billing category. For example:

- Current: "Thank you for your patronage."

- Overdue 30: "Payment is now past due. Please send payment promptly."

- Overdue 60: "Failure to pay balance due in full may result in termination."

- Overdue 90: "Your account, with an outstanding balance of <amount>, may be sent to collection. Please contact the office."

- Overdue 120: "Your account, with an outstanding balance of <amount>, will be sent to a collection agency in 30 days."

When you print your bills, the appropriate bill message will print automatically. If a category doesn't have a specific message, then a *default* message will be used instead (if it exists).

Note: The Current-30-60-90-120 day batch billing messages will appear *in addition* to the personal billing messages stored in the Family Editor (**fame**).

2.5.1 Change Your Billing Messages

You can review, delete, add, or change any of your global billing messages through the **billmsg** program.

From the **bills** program, press [**F6** -- *Bill Message*] to run the **billmsg** program. You can also type **billmsg** at a command prompt.

When you start **billmsg**, you will be presented with a list of choices:

Use the arrow keys to make your selection and press **Enter**. If a billing message for your selection currently exists, it will be displayed at the top of your screen and you will be given options to change it or keep it. If the message you selected has never been configured, you will be offered the chance to create it.

Whenever you make changes, **billmsg** will ask you to confirm that you want to over-write the old message with the new one.

Amount Variable: You can add a variable that will be replaced with the amount of the bill: <amount>. See the "Overdue 90" and "Overdue 120" examples above.

2.6. Review the Bill Log

Every time you generate a batch of bills, Partner keeps a record in the Bill Log (**billlog**) program. You can use **billlog** to review details about your bill batches, find out who received a bill in each bill run, research why a family did *not* receive a bill, or examine a digital copy of any personal bill.

2.6.1 Run the Bill Log Program

You can run the bill log by pressing [**F8** -- *View Bill Log*] in the Bills program.

```
                         Print Personal Bills

           Date range:              Zip code range:
                Start: 12/01/08          Start: 00000
                  End: 03/20/09            End: 99999

           Print these bills:       Alphabet range:
                  Normal? Yes             Start: a
        Overdue 30 days? No                 End: c
        Overdue 60 days? No
        Overdue 90 days? No
       Overdue 120 days? Yes

     Messages:




      ┌────────┐┌────────┐┌──────┐┌──────┐    ┌────────┐┌────────┐┌──────┐┌────────┐
      │ Make   ││Prepare ││      ││      │    │ Print  ││ Edit   ││      ││ View   │
      │Changes ││Bills   ││      ││      │    │One Bill││Bill Msg││      ││Bill Log│
      └────────┘└────────┘└──────┘└──────┘    └────────┘└────────┘└──────┘└────────┘
```
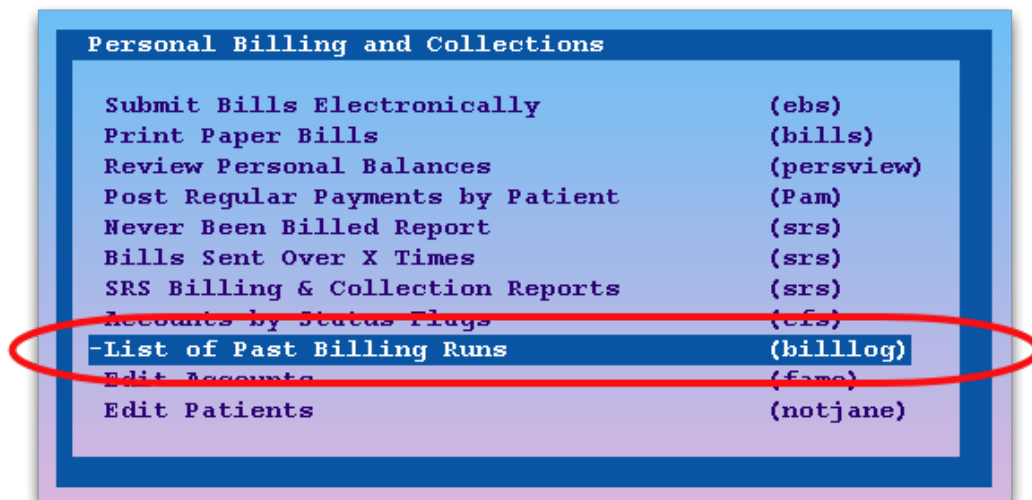
```
                   Bill Log - Bill Batch Listing

   Date      Who     Date Range         Zip Range      Alphabet Range Bill Agings
 X 02/23/09  sploof  01/01/80-12/07/08  00000-99999  a-a            0,30,60,90,120
   02/23/09  sploof  01/01/80-12/07/08  00000-99999  a-c            0,30,60,90,120
   02/23/09  sploof  01/01/80-12/07/08  00000-99999  a-z            0,30,60,90,120
   02/22/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   01/07/09  sploof  01/01/80-12/07/08  00000-01000  a-b            0,30,60,90,120
   12/08/08  sploof  01/01/80-12/07/08  00000-99999  a-b            0,30,60,90,120
   12/07/08  sploof  01/01/80-12/07/08  00000-99999  a-b            0,30,60,90,120
   12/07/08  sploof  01/01/08-08/19/08  00000-99999  l-l            0,30,60,90,120
   12/07/08  sploof  01/01/08-08/19/08  00000-99999  y-z            0,30,60,90,120




   ┌────────┐┌────────┐┌──────┐┌──────┐  ┌──────┐┌──────┐┌──────┐┌──────┐
   │Accounts││Accounts││      ││      │  │      ││      ││      ││      │
   │Billed  ││NotBilld││      ││      │  │      ││      ││      ││      │
   └────────┘└────────┘└──────┘└──────┘  └──────┘└──────┘└──────┘└──────┘
```

You can also select Bill Log from the Personal Billing window in your Partner windows, or you can type **billlog** at a command prompt.

2.6.2 View the List of Past Bill Batches

The Bill Batch Listing screen in **billlog** displays each billing batch your office has run since the Bill Log program was updated in 2009.

For each entry, you can see the date the bills were submitted, the user who submitted the bills, and the billing batch criteria (date, zipcode range, alphabet range, and aging categories). **Note:** In the example above, the user "sploof" generated bills repeatedly to test the new billing system.

Use the arrow keys to select a bill batch entry. Press [**F1** -- *Accounts Billed*] to review accounts and bills in the bill batch. Press [**F2** -- *Accounts Not Billed*] to view all accounts that did *not* receive a bill.

2.6.3 View the List of Accounts Billed

Select a bill batch in **billlog** and press [**F1** -- *Accounts Billed*] to view a list of accounts that received a bill in that bill run.

For each account, you can see the account name and the bill amount. You can use function keys to sort the list by last name or by total bill amount.

2.6.4 View a Copy of an Old Bill

While viewing a list of accounts billed in **billlog**, use the arrow keys to select an account and press [**F1** -- *View Bill*] to see an electronic copy of that bill.

```
        Jeffrey Addington                          Doctors Office
        730 Grandview Drive                        123 Main Street
        Saint Albans Bay, VT  05481                Springfield, VT  1


                                                   (xxx) xxx-xxxx



                    Please Detach And Return Top Portion With Your Paym
| Date of |   Description of Services From    |        | Payments & | Due Fr
| Service |       01/01/80 to 12/07/08        | Charges| Adjustments| Insura
            BALANCE FORWARD

Abigail Addington (~Dr. Casey, Office)
 02/26/07  OV Expanded Focus                  $  56.00
           02/26/07 Visa Card Payment                      $  10.00-

Abigail Addington (~Dr. Williams, Office)
 03/07/07  Urinalysis with Microscopy         $  13.00
 03/07/07  OV Detailed H&E                     $  87.00

Nathaniel Addington (~Dr. Williams, Office)
```

| Quit | Jump to Top | Jump to Bottom | Send To... | | | | Search Pattern |

Use the Page Down, Page Up, and arrow keys to navigate the electronic bill. The appearance of the bill on the screen will not precisely match the printed layout, but all content is otherwise identical.

2.6.5 View All Accounts Not Billed
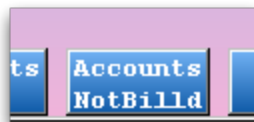
Select a bill batch in **billlog** and press [**F2** -- *Accounts Not Billed*] to review accounts that did not receive a bill for that bill run.


```
                     Bill Log - Accounts Not Billed

Achey, Jeremy         (#1465)   Personal balance $   0.00   below cutoff $   4
Acker, Patricia       (#28)     Account balance $   0.00   is not greater then
Adams, Ambrocio       (#1962)   Account balance $   0.00   is not greater then
Adams, Herb           (#1348)   Personal balance $   3.26   below cutoff $   4
Adler, Craig A.       (#1185)   Account balance $   0.00   is not greater then

Aeberhard, Anthony    (#156)    Personal balance $   0.00   below cutoff $   4
Aftosmes, Cheryl      (#288)    Personal balance $   1.60   below cutoff $   4
Agarwal, Mark         (#618)    Account balance $   0.00   is not greater then
Ahson, Alejandro      (#1830)   Account balance $   0.00   is not greater then
Albert, Dale          (#724)    Account balance $   0.00   is not greater then

Albert, Roy           (#1504)   Account balance $   0.00   is not greater then
Albert, Scott         (#793)    Account balance $   0.00   is not greater then
Alger, Tricia         (#649)    Account balance $   0.00   is not greater then
Alleman, Laverne M    (#1935)   Account balance $   0.00   is not greater then
Allen, Donald         (#57)     Account balance $   0.00   is not greater then

Allison, Dean         (#317)    Account balance $   0.00   is not greater then
Allison, Hank         (#431)    Account balance $   0.00   is not greater then
```

| Quit | Jump to Top | Jump to Bottom | Send To... | | | | Search Pattern |

For each account, you can see the account name, the account PCC number, and the reason that the account did not receive a bill.

Scroll, Send, and Search: The Accounts Not Billed list is displayed using the report display program (**pless**). The function keys allow you to jump to the bottom or top of the report, redirect the output to a printer, an e-mail address, or a file, or enter a search pattern.

If you are researching a problem with an account, for example, press [**F8** -- *Search Pattern*], enter the account name, and press **Enter**.
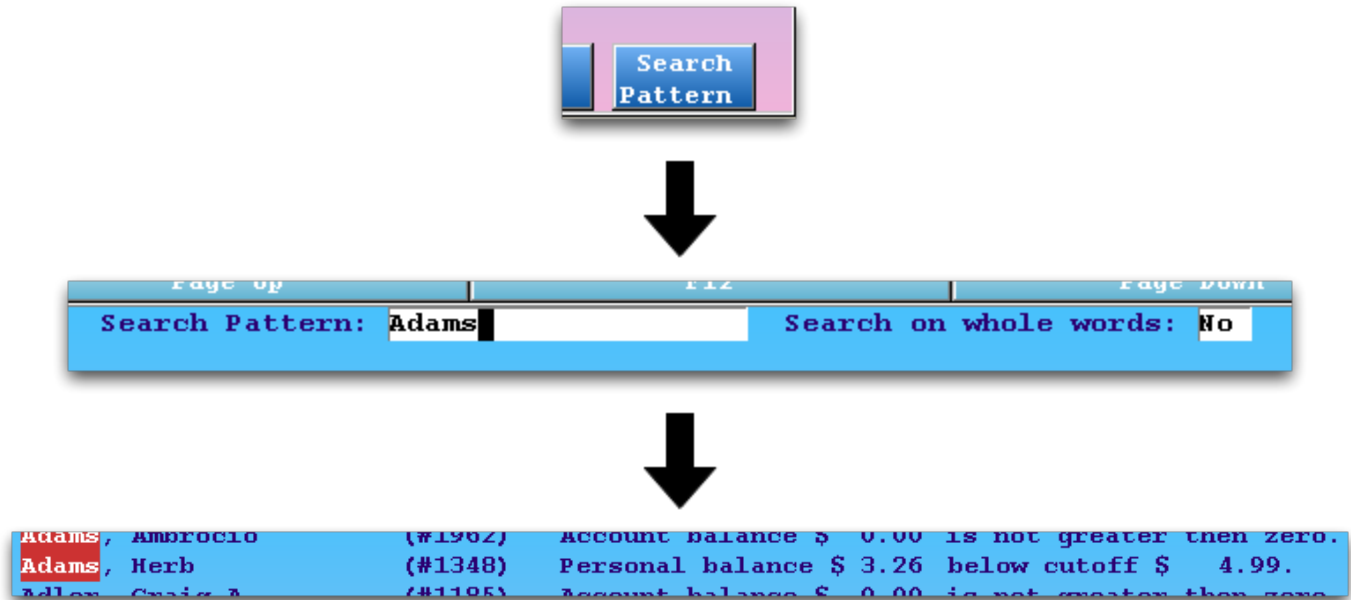
3. Follow Up on Unpaid Bills

Unfortunately, not every family pays their bills on time. An address may be incorrect, a family may have questions about their balance, or they may be unable to pay. Following up on outstanding bills is a vital part of the billing process.

- The **persview** program will help you track and work down outstanding personal balances.
- The Collection (**coll**) report explains all outstanding balances and recent activity for an account.
- The Special Accounts Editor (**cfs**) helps track and manage accounts that are overdue, on budget plans, or have special statuses.
- You can review a digital copy of any personal bill in the Correct Mistakes (oops) program. Read the Review a Printed Bill article to see how.

3.1. The Personal Money Tracking Assistant

The Personal Money Tracking Assistant, or **persview**, helps you manage your personal accounts receivable. **persview** creates an interactive list of accounts with personal balances. The list can contain all outstanding accounts or just a portion, depending on the criteria you enter when you first run the program.

If you have a dedicated personal biller, they should use **persview** every day when working down unpaid balances. By specifying different criteria, a user can focus on a certain portion of your practice's personal A/R. For example, some offices split up overdue accounts by last name, while others work on the accounts based on the age or amount of the balance. Regardless of how your office works, **persview** can help you hone in on the accounts you need to contact.

The report's results can be printed or saved in your e-mail box, but the real power of **persview** comes from working with the list on your screen. By pressing different function keys, you can send out form letters, review account histories, generate bills, enter notes, post payments, post late fees, and even write off bad debt... all from the same interface.

3.1.1 Run persview and Select Options

You can find **persview** in the Personal Billing section of the Billing Functions window in Partner. You can also run it by typing **persview** at a command prompt.

When you first run **persview**, you are presented with a criteria screen:

```
            PERSONAL MONEY TRACKING ASSISTANT

  Aged How?            Aged as of what date?
  X Transaction Date   X Use Nightly  File for 03/29/05
    Posting Date         Use Existing File for 00/00/00 (from 00/00/00)
    Payor Date           Regenerate as of: 07/06/05


  Personal Balance Range to Include:  $   0.00    - $99999.99
  How to Sort the List                Which Accounts to Include
  X Account Name                      Review Name Range:    A - Z
    Total Personal Amount
                                      X Accounts with Current  Balances
                                      X Accounts with 30    Day Balances
                                      X Accounts with 60    Day Balances
  Destination                         X Accounts with 90    Day Balances
  X Screen                            X Accounts with 120+ Day Balances
    Mailbox
    Printer:    [            ]          Exclude by Account Flag


  Generate
  Report
```

Press [**F1** -- *Generate Report*] to view a list of all accounts with personal balances.

Before you press [**F1**], however, you can use the criteria options on the screen to limit which accounts will appear.

Criteria Options in persview

- *Aged How*

  You can choose how outstanding charges should be aged. Account totals appear in aging categories on the report, and they can be aged by transaction date (when the service occurred), by posting date (when the service was entered onto the system), or by payor date (the date the balance became the account's responsibility).

- *Aged as of...*

  Select a date to base the report on. Use the last "Nightly File" for a quick report, as the aging data is automatically prepared the previous night. Use the Existing File to quickly review the last report you manually aged. Or, ask **persview** to manually regenerate to a particular date. In most situations, you should stick with the Nightly File. If you have just finished entering dozens of payments, you may want to "Regenerate" the aging information for today.

- *Personal Balance Range*

  You may not want to work with an account unless they owe over ten dollars. If you only want to list accounts that have a certain balance, enter a dollar amount range in the fields provided.

- *Name Range*

  The Name Range question allows you to select a specific range of the alphabet. Enter the starting and ending letters of your alphabet range in place of the A and Z. Use this option if your office's billers divide their responsibilities by account last names.

- *Which Accounts to Include*

  By default, all of the categories shown are selected. If you wish to limit the accounts based on how long they have owed you money, you can remove or add X's in front of each category. The "Exclude by Account Flag" option can be useful if you don't wish to view certain account types.

- *How to Sort the List*

  You can sort the printed report or **persview's** interactive on-screen report in alphabetical order or by the total balance owed by the account. To indicate your selection, place an *X* in front of one of the two choices. You may find it useful to sort accounts by who owes you the most.

- *Destination*

  Finally, you must decide where to send the report output. To indicate your selection, just place an *X* in front of your choice.

  - If you specify the "Screen" as your destination, the results will appear on your computer screen in an interactive report. You will be able to scroll through the list and easily access information about the various accounts that are listed. It is also easy to generate a form letter or bill for some or all of the accounts. See below for more information.

  - If you send the output to your "Mailbox", you will receive an e-mail that you can review at a later time. You can also save the e-mail in a folder for archival purposes.

  - If you opt to print the report, it will be printed on your default Partner printer unless you enter the name of a different printer. Enter an asterisk (*) to view and select from a list of available printers.

  While printing or sending the list as an e-mail may be useful, you will find the interactive list (Screen) the most powerful choice. The remaining sections in this chapter explain how to take full advantage of the "Screen" option.

After making your criteria selections, press [**F1** -- *Generate Report*] to run the report. **persview** may take a few minutes to gather the information about accounts with personal balances.

3.1.2 Work with Account Result List

The first screen that appears when you send **persview** to the screen looks like this:

```
               WORKING WITH *INDIVIDUAL* ACCOUNTS

   Name                Current     30..59     60..89     90..119     120+       Total
X  Rickman, Karlee   $    0.00  $    0.00  $    0.00  $ 270.00  $ 806.00  $1076.00
   Chambers, Raushan $    0.00  $   50.97  $    0.00  $1017.14  $    0.00  $1068.11
   Ganey, Tajh       $   91.00  $    0.00  $  127.00  $ 101.00  $ 610.65  $ 929.65

   Hairston, Teryl   $  268.00  $  177.00  $  181.00  $ 281.00  $    0.00  $ 907.00
   Alanis, Marquita  $    0.00  $    0.00  $   64.00  $    0.00  $ 840.00  $ 904.00
   Gear, Tamaya      $    0.00  $  240.00  $  505.00  $    0.00  $    0.00  $ 745.00

   Hursey, Tomi      $  101.00  $  320.00  $  322.50  $    0.00  $    0.00  $ 743.50
   Gordon, Denna     $    0.00  $   50.00  $   50.00  $   25.00  $ 612.25  $ 737.25
   Burnes, Annette   $    0.00  $    0.00  $  127.00  $  496.40  $ 113.60  $ 737.00

   Blaxton, Mordecai $   39.00  $    0.00  $   69.00  $    0.00  $ 611.99  $ 719.99
   Galvanromero, Tai $    0.00  $   20.00  $  342.50  $   20.00  $ 329.74  $ 712.24
   Eldridge, Charlott$    0.00  $   64.00  $    0.00  $    0.00  $ 620.50  $ 684.50

   Raymond, Keela    $    0.00  $    0.00  $   30.00  $   33.00  $ 598.73  $ 661.73
   Gilmer, Tanika    $  101.00  $  165.00  $  370.00  $    0.00  $    0.00  $ 636.00
   Wethal, Lorena    $    0.00  $  606.25  $    0.00  $    0.00  $    0.00  $ 606.25

   Fulford, Shaykeria$    0.00  $    0.00  $   30.00  $    0.00  $ 570.00  $ 600.00
   Burke, Annah      $    0.00  $    0.00  $  124.00  $    0.00  $ 468.20  $ 592.20
   Moody, Quantrell  $    0.00  $    0.00  $    0.00  $   15.00  $ 546.40  $ 561.40

   Palacio, Jessae   $  320.00  $    0.00  $    0.00  $    0.00  $ 228.50  $ 548.50
```

| Main Menu | Edit Account | Refund | Pam | Daysheet History | Form Letters | Print One Bill | Work With All |

The account list includes aged balances and totals. The accounts are grouped in sets of three, making the list easier to read. In the example shown, the user sorted the list by "Total Personal Amount" owed. The most urgent account problems are at the top of the screen. Press **Page Down** and **Page Up** to scroll through the list and view all accounts.

The screen allows you to work with a specific account. Select an account by placing an **X** in the box in front of the account name. Once you have selected an account, you can do a variety of different operations by pressing different function keys. For example, press [**F2** -- *Edit Account*] to run the Family Editor (**fame**) for the selected account. From **fame** you can check the account's insurance companies and run the **coll** report to review the reasons for the balance.

Actions From the Individual Account Screen

[**F1** -- *Main Menu*]

Press [**F1**] to return to the Main Menu, where you can enter a different set of criteria.

[**F2** -- *Edit Account*]

Press [**F2**] to access **fame** for the selected account. In **fame** you can review demographic information, run the collection report, view a complete account history, review insurance information, enter account notes, and more.

[**F3** -- *Refund*]

Press [**F3**] to run **refund** for the selected account. In **refund** you can quickly refund a credit, print a bill,

and post late charges and other fees.

[**F4** -- *Pam*]

Press [**F4**] to post payments or adjustments in **pam**. This is useful when the selected account agrees to pay with a credit card over the phone. You can also write off debt by using an appropriate payment type.

[**F5** -- *Daysheet History*]

Press [**F5**] to scan through the daysheets and view all transactions related to the selected account. If you suspect a payment or charge has been deleted, the daysheet history can show you the amount and which user deleted it.

[**F6** -- *Form Letters*]

Press [**F6**] to print one or more form letters for the selected account.

[**F7** -- *Print One Bill*]

Press [**F7**] to print a bill for the selected account. When you press this function key, you will be asked to enter a date range for the bill.

[**F8** -- *Work With All*]

Press [**F8**] to switch to working with all accounts listed. See the section below for more information.

3.1.3 Work with All Accounts

When you press [**F8** -- *Work With All*], **persview** shows you new function keys for performing batch functions on all listed accounts:

```
┌──────────────────┬──────────────────┬──────────────────┐
│    Page Up       │      F12         │    Page Down     │
├──────────────────┴──────────────────┴──────────────────┤
│            WORKING WITH *ALL* ACCOUNTS                  │
│                                                         │
│  Name            Current   30..59   60..89   90..119    120+      Total │
│ X Rickman, Karlee  $   0.00 $   0.00 $   0.00 $ 270.00 $ 806.00 $1076.00 │
│   Chambers, Raushan $  0.00 $  50.97 $   0.00 $1017.14 $   0.00 $1068.11 │
│   Ganey, Tajh      $  91.00 $   0.00 $ 127.00 $ 101.00 $ 610.65 $ 929.65 │
│                                                         │
│   Hairston, Teryl  $ 268.00 $ 177.00 $ 181.00 $ 281.00 $   0.00 $ 907.00 │
│   Alanis, Marquita $   0.00 $   0.00 $  64.00 $   0.00 $ 840.00 $ 904.00 │
│   Gear, Tamaya     $   0.00 $ 240.00 $ 505.00 $   0.00 $   0.00 $ 745.00 │
│                                                         │
│   Hursey, Tomi     $ 101.00 $ 320.00 $ 322.50 $   0.00 $   0.00 $ 743.50 │
│   Gordon, Denna    $   0.00 $  50.00 $  50.00 $  25.00 $ 612.25 $ 737.25 │
│   Burnes, Annette  $   0.00 $   0.00 $ 127.00 $ 496.40 $ 113.60 $ 737.00 │
│                                                         │
│   Blaxton, Mordecai $ 39.00 $   0.00 $  69.00 $   0.00 $ 611.99 $ 719.99 │
│   Galvanromero, Tai $  0.00 $  20.00 $ 342.50 $  20.00 $ 329.74 $ 712.24 │
│   Eldridge, Charlott$  0.00 $  64.00 $   0.00 $   0.00 $ 620.50 $ 684.50 │
│                                                         │
│   Raymond, Keela   $   0.00 $   0.00 $  30.00 $  33.00 $ 598.73 $ 661.73 │
│   Gilmer, Tanika   $ 101.00 $ 165.00 $ 370.00 $   0.00 $   0.00 $ 636.00 │
│   Wethal, Lorena   $   0.00 $ 606.25 $   0.00 $   0.00 $   0.00 $ 606.25 │
│                                                         │
│   Fulford, Shaykeria$   0.00 $   0.00 $  30.00 $   0.00 $ 570.00 $ 600.00 │
│   Burke, Annah     $   0.00 $   0.00 $ 124.00 $   0.00 $ 468.20 $ 592.20 │
│   Moody, Quantrell $   0.00 $   0.00 $   0.00 $  15.00 $ 546.40 $ 561.40 │
│                                                         │
│   Palacio, Jessae  $ 320.00 $   0.00 $   0.00 $   0.00 $ 228.50 $ 548.50 │
│ ┌──────┐                              ┌──────┬──────┬──────┐ │
│ │ Main │                              │ Form │ Print│ See  │ │
│ │ Menu │                              │Letters│Bills│Totals│ │
│ └──────┘                              └──────┴──────┴──────┘ │
└─────────────────────────────────────────────────────────┘
```

The new function keys will perform actions upon all the accounts in the list.

Actions for All Accounts

[**F1** -- *Main Menu*]

Press [**F1**] to return to the Main Menu, where you can enter a different set of criteria.

[**F6** -- *Form Letters*]

Press [**F6**] to select one or more form letters and print them for *every account* in the list. By using **pers-view**'s criteria options and this function, you could generate a form letter for all accounts with specific overdue balances amounts or a specific account flag.

[**F7** -- *Print Bills*]

Press [**F7**] to print bills for all accounts on the list. You will be prompted for a date range.

[**F8** -- *See Totals*]

Press [**F8**] to view the Personal Totals screen, described below.

3.1.4 Review Personal Totals

Press [**F8** -- *See Totals*] from the "Working With All" screen in **persview** to view a summary for the accounts in the report:

When you press **F8**, **persview** tallies up the personal money owed to your practice by everyone on the list. It then presents the totals to you, broken down by the age of the balance.

As long as you run the reports with similar criteria (same alphabet range, same aging categories, same aging types, etc) the totals on this **persview** screen should match those from the **aging** and **insaging** reports.

Press [**F8** -- *Work With One*] to cycle back to the other **persview** screens.

3.2. The Collection Report

The Collection Report (**coll**) explains an account's current balance and recent payment history. If a family does not understand why they owe money, run **coll**. It can also help you determine whether or not an account has been making regular payments against their outstanding balance.

This program examines an account and then reports:

- Account Aging
- Outstanding Charges
- Recent Personal Payments
- Demographic Information

The report can be sent to the screen, printer, or to your email box.

3.2.1 Running coll and Selecting Criteria

You can run **coll** for a particular account by pressing [**F3** -- Collection Report] while in the Family Editor (**fame**) for that account.

You can also access **coll** from a command prompt by typing **coll** and then pressing **Enter**.

If you start **coll** from a command prompt, you will be asked to select an account to report on, and then **coll** will display the criteria selection screen. If you start it from within **fame**, then it already knows which account to report on and therefore displays the criteria screen immediately.

On the criteria screen, you can make selections to change the report output.

- You can determine whether you want the output on your screen, in your e-mail box, printed out, or used interactively on the screen.

- You can also choose to include only certain sections of the report using the "Include on the Report" checkboxes shown.

- Finally, since the report can show you all recent personal payments, you can change the date range of payments the report will display.

Press [**F1** -- *Process Report*] to create the report.

3.2.2 Reading the coll Report Output

The standard **coll** report contains the sections shown below.

```
ACCOUNT INFORMATION:                                           PCC#  5350
--------------------------------------------------------------------------
Sean Amoroso                         Home Phone: 802-498-7773
4A Spruance Way                      Work Phone: 802-786-2185
Townsend, VT  05359                  Temp Phone: 802-557-6608
Alt Phone: 802-995-8411
Status:

Date of most recent
      Visit/Service: 11/18/00     Hold Bill Till:
 Personal Bill Sent:                Budget Amount: $   0.00
   Personal Payment: 11/09/00   Insurance Payment: 11/01/00


AGING SUMMARIES:            CURRENT     OD30     OD60     OD90     OD120    TOTAL
--------------------------------------------------------------------------
BY PAYOR RESP DATE:
```

```
Personal                           0.00    0.00    0.00    0.00   65.00   65.00
Medicaid                           0.00    0.00    0.00    0.00  203.00  203.00

BY TRANS DATE:
Personal                           0.00    0.00    0.00    0.00   65.00   65.00
Medicaid                           0.00    0.00    0.00    0.00  203.00  203.00


OUTSTANDING CHARGES:              DIAG    PROV   AMOUNT  PERS DUE   INS DUE
-----------------------------------------------------------------------------
01/15/00 Amoroso, Harrison
    OV Highly Compreh             V20.2   Nurs   125.00    65.00      0.00

11/05/00 Amoroso, Michael
    Urine Culture                 599.0   DoLi    18.00     0.00     18.00
    OV Expanded Focus             599.0   DoLi    60.00     0.00     60.00

11/11/00 Amoroso, Robinson
    Physical 12-17 yrs            V20.2   Trap   125.00     0.00    125.00

                                                        --------- ---------
TOTAL AMOUNT DUE                                           65.00    203.00


RECENT PERSONAL PAYMENTS:                    CK NUMBER    AMOUNT
-----------------------------------------------------------------------------
11/09/00   TOS Cash                                       20.00
07/27/00   TOS Cash                                       40.00


YEAR-TO-DATE SUMMARY:
-----------------------------------------------------------------------------
YTD Charges: $   0.00
YTD Insurance Payments: $  90.00
YTD Medicaid Payments: $ 794.15
YTD Personal Payments: $  60.00
YTD Total Adjustments: $ 345.85
```

The complete **coll** report has four sections: Account Aging, Outstanding Charges, Recent Personal Payments and Demographic Information. You can include any or all of these sections. To include a section, make sure that it is marked with an 'X' on the criteria screen before you generate the report.

- **Account Info:** The first section contains simple demographic information, including the account name, address and phone numbers, as well as some key dates (date of last visit, last bill sent, last personal payment made, and last insurance payment made.) If you use the "Hold Bill Till" and "Budget Amount" functions of the Family Editor (**fame**), you will see information about those settings in this section of the report.

  The Account Info section of **coll** is customizable. If you need to format your **coll** report to suite the needs of your practice, contact PCC for help creating a custom header.

- **Aging Summaries:** The **coll** report shows you two different ways of aging an account's outstanding personal charges. Balances are first aged by Payor Responsibility Date, and then by Transaction Date. Payor

Responsibility is different in that it will age items based on when the amount became personal, instead of aging strictly from the date of service. Within each category, amounts are shown for balances that are overdue 30, 60, 90, and 120 days.

- **Outstanding Charges:** The report contains a list of currently unpaid, personal charges. This section makes it especially easy to explain an account's balance to someone over the phone. It contains the patient's name, the diagnoses and procedures of the visit, and three columns to indicate how much was originally charged, how much is due to the personal account, and how much is still pending an insurance company.

- **Recent Payments.** The report shows a summary of recent personal payments. Use this information to see whether or not an account has been making regular payments. Accounts that are working to pay off an old balance should be making regular payments.

- **Year-To-Date Summary.** The last section contains a year-to-date summary for charges and payments.

3.3. Work with Special Accounts

Use the Special Accounts Editor (**cfs**) to work with all accounts with certain status flags or other specific characteristics. For example, you may want to list all accounts that your office put on a budget plan, or all accounts that were flagged as "Cash Only" for writing a bad check. You can view and work with all of these types of accounts by using the **cfs** report.

cfs provides you with a list of patients with specific Account Status Flags or other account issues. You can then jump into different Partner programs directly from the list.

3.3.1 Running cfs and Selecting Criteria

You can run **cfs** from the "Patient/Account Reports" section of Partner. You can also type **cfs** from a command prompt.

```
┌──────────────────┬──────────────────┬──────────────────┐
│     Page Up      │       F12        │    Page Down     │
├──────────────────┴──────────────────┴──────────────────┤
│                                                          │
│         The Special Accounts Editor      Page 1 of 1     │
│                                                          │
│  Which accounts do you want to look at:                  │
│                                                          │
│   (o)   Overdue               (15) GIVE NO INFO-Confidential Chart │
│   (b)   Budget                (16) Hospital Only         │
│   (u)   Budget Overdue        (17) Terminated            │
│   (h)   Bills Held            (18) Transferred           │
│   (m)   Medicaid              (19) Call Billing Office   │
│   (d)   Delinquent Medicaid   (20) Copays @ TOS!         │
│   (l)   Late insurance payments (21) Must select new pcp - Do Not See! │
│   (c)   Credits                                          │
│   (n)   Billing Notes                                    │
│   (1)   Transient                                        │
│   (2)   PC(insurance)                                    │
│   (3)   PC(half off)                                     │
│   (4)   Inactive                                         │
│   (5)   Collection                                       │
│   (6)   Dismissed                                        │
│   (7)   Cash Only                                        │
│   (8)   No Collection Per Md                             │
│   (9)   Staff                                            │
│   (10)  Hold                                             │
│   (11)  Delinquent                                       │
│   (12)  No Doubles                                       │
│   (13)  Bad Debt                                         │
│   (14)  Budget                                           │
│                                                          │
└──────────────────────────────────────────────────────────┘
```

There are two types of lists found in **cfs**:

- Standard lists that appear on all systems. These include accounts that are *Overdue,* on a *Budget Plan,* who have *Credits* or have *Bills Held* by a flag.

- Customized lists based on your office's Account Flags. These include all of the Account Status Flags in the Table Editor (**ted**). If you add a new account flag and assign it to specific accounts, you will be able to work with those accounts using a report option in **cfs**.

Note: The lists stored in **cfs** are created overnight. Transactions posted through the day will not affect whether an account appears on a list or not. No matter what changes you make to an account, they will remain on a list until the lists are recreated in the evening.

3.3.2 Viewing the Report and Working With Accounts

Enter the letter or number next to a list and press **Enter** to view it. All accounts on the selected list, along with their balance information and phone number, will appear:

The example above shows all of the *Collection* accounts. Collection accounts are accounts that have been assigned the "Collection" flag on the status line in the Family Editor (**fame**).

As you view the list and work with each of the families, you can perform the following functions:

Actions in cfs

[**F1** -- *Start of List*]

      Press [**F1**] to jump to the top of the list.

[**F2** -- *Jump to Letter*]

Press [**F2**] and input a letter to jump to a spot somewhere in the alphabetical list of accounts.

[**F3** -- *End of List*]

Press [**F3**] to jump to the bottom of the list.

[**F4** -- *Remove Flag*]

Press [**F4**] to remove the status flag (such as the "Collections" flag) that causes the account to appear on this list. Remember that the account will remain on the list until **cfs** rebuilds its lists overnight.

[**F6** -- *Form Letters*]

Press [**F6**] to select and print a form letter for any account on the list.

[**F7** -- *Oops Account*]

Press [**F7**] to run the Correct Mistakes (**oops**) program for any account on the list. In **oops**, you can view billing history, change insurance pending status, and rebatch or print outstanding claims.

[**F8** -- *View Account*]

Press [**F8**] to run the Family Editor (**fame**) program for any account on the list. In **fame**, you can view a detailed family history, run the Collection report (**coll**) to review outstanding charges, add notes to the account, review insurance information, and more.

3.4. Review a Printed Bill in oops

You can view a digital copy of a personal bill in the Correct Mistakes (**oops**) program.

Step 1: Run oops for the Account

Run **oops** from the Daily Operations window or from the Correct Mistakes function key found in many Partner programs.

Step 2: Page Down and Find the Bill Entry

When Partner generates a bill for an account, a line appears in the charge history in **oops**. Find the bill you wish to review.

Note: No digital copy is kept for "Time of Service Bills" printed from the Checkout program.

Step 3: Press [F3 -- *See Claim Report/Bill*]
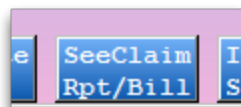
Step 4: Enter the Item Number of the Bill Message, Press Enter

ITEM	DATE	PATIENT	PROCEDURE NAME	DIAG	SVC	BIL	AMOUNT	SUM DUE
)	12/17/11	C Dino	Well Child 1-4 yr	V20.2	C	C	135.00	0.00
)		03/30/12 Visa Card Payment			C		10.00	
34)		01/19/12 Personal Bill						
)		01/08/12 Ins Pmt Aetna HMO			C		92.36	
)		01/08/12 Ins Adj Aetna HMO			C		32.64	
)		01/08/12 Aetna USHC HMO HCFA #68						
)		09/12/11 Aetna USHC HMO claim batched						
)		Dino	Vision Screen	V72.0	C	C	10.00	0.00
)		01/08/12 Ins Pmt Aetna HMO			C		0.00	
)		01/08/12 Ins Adj Aetna HMO			C		10.00	
)		01/08/12 Aetna USHC HMO HCFA #68						
)		09/12/11 Aetna USHC HMO claim batched						
)		Dino	Hearing Screen	V72.1	C	C	10.00	0.00
)		01/08/12 Ins Pmt Aetna HMO			C		0.00	
)		01/08/12 Ins Adj Aetna HMO			C		10.00	
)		01/08/12 Aetna USHC HMO HCFA #68						
)		09/12/11 Aetna USHC HMO claim batched						

```
  Personal: $   37.00    Correcting Fred Flintstone (# 1980).
 Insurance: $  128.00    There are 770 more items.
  Medicaid: $    0.00    Type the item number to view: 34
```

Step 5: Read the Bill

```
        Jeffrey Addington                          Doctors Office
        730 Grandview Drive                        123 Main Street
        Saint Albans Bay, VT   05481               Springfield, VT  1

                                                   (xxx) xxx-xxxx


                        Please Detach And Return Top Portion With Your Paym
| Date of |    Description of Services From    |          | Payments & | Due Fr
| Service |        01/01/80 to 12/07/08        | Charges  | Adjustments| Insura
            BALANCE FORWARD

Abigail Addington (~Dr. Casey, Office)
 02/26/07  OV Expanded Focus                $  56.00
           02/26/07 Visa Card Payment                    $  10.00-

Abigail Addington (~Dr. Williams, Office)
 03/07/07  Urinalysis with Microscopy       $  13.00
 03/07/07  OV Detailed H&E                   $  87.00

Nathaniel Addington (~Dr. Williams, Office)
```

Quit	Jump to Top	Jump to Bottom	Send To...				Search Pattern

You can press Page Up or Page Down or use the function keys and arrow keys to review the bill. You can also press [F4 - Send To...] to send the bill content to a printer or an e-mail address.

Important Note: The original, printed bill may have additional formatting to alter its appearance. The text content of the digital copy, however, is identical to the original bill.

4. Post Personal Payments and Adjustments

Use **pam** to post personal payments or adjustments to an account. The **pam** program makes it fast and easy to post a stack of checks or a single copay.

Payments typically posted through **pam** include personal checks, money orders, credit card payments, and cash. Payments from insurance companies are posted using the Post Insurance Payments (**pip**) program.

The sections below will teach you how to post a payment and apply it towards a charge. You will also learn special features and tools you can use during each step of the process.

Not Just For Payments: While **pam**'s primary purpose is to post payments, it can also post account adjustments. Any adjustment that behaves like a payment and would result in a decreasing balance should be posted in **pam**. Adjustments that behave like refunds (or procedures) and increase an account's balance (or remove a credit) should be posted in the **refund** program.

4.1. Quickstart: Post a Payment

Read the steps below for a complete introduction to **pam**. Follow the steps to post a personal check and apply it to several old balances. Then read the sections below to learn more about the tools and features of **pam**.

Step 1: Start pam

> You can access **pam** from the "Daily Operations" window of your Partner windows. You can also type **pam** at a command prompt.
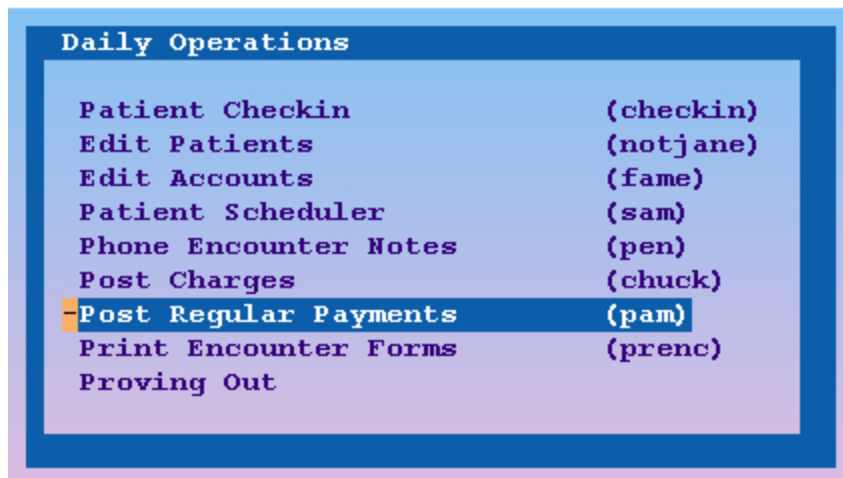
Step 2: Find an Account

> Enter the account's name into the find screen:

To learn more about finding patients and accounts, read *Finding Patients and Accounts*.

Step 3: Enter Basic Payment Information

Enter the date of the payment, the payment type, the amount, the check number (if applicable) and optionally a provider. Press the **Tab** or **Enter** keys to move forward one field, press the **Backspace** or left arrow keys to move back one field.

Automatic Date: Today's date is entered for you automatically. If you wish to record a previous date of payment, simply press **Backspace** and change the date. The date can be written without slashes, i.e. "092205" for September 9th, 2005, and you can use the abbreviations of "y" for yesterday and "t" for today.

Step 4: Press [F4 -- *Link Payments*]

Press **F4** to view the list of outstanding charges to which your new payment may be applied.

Step 5: **Select Charges to Apply the Payment Against**

Enter the number, or range of numbers, of the charges towards which you wish to apply your new payment. To help you make your selection, the screen displays the amount of each charge that is currently pending insurance and the amount due personal. In most cases, you will apply the full amount of a personal payment to the oldest charges first.

```
ALL DUE charges for Account: Fred Flintstone
Acct Status: Budget
  #   Date    Patient P Code    Proc Name    Diag     Amount   Ins Due   Per Due
  1 08/20/05 Dino     D 99392   Well Child   V20.2 $  93.00 $    0.00 $   37.00
  2 09/19/05 Pebbles  W 99214   OV Detailed  493.0 $  87.00 $   77.00 $   10.00
  3 10/30/05 Dino     O 90658   Influenza V  493.0 $  15.00 $    0.00 $   15.00
  4          Dino     O 99211   OV Minimal   V04.8 $  20.00 $    0.00 $   20.00
  5          Dino     O 90471   1 Immuniz A  V04.8 $  10.00 $    0.00 $   10.00
  6 11/15/05 Dino     G 99213   OV Expanded  382.9 $  56.00 $    0.00 $   56.00

There are 0 more charges for this patient.
T)OS HCFA, H)CFA, Q)uit, or numbers to make payment on:
      > 1-6
```

| Quit | | Batch
HCFA | Print
TOS HCFA | | Print A
Bill | Correct
Mistakes | Family
Editor | Show
Insuranc |

You can use a range of numbers or commas to select specific charges. Press **Enter** to continue.

Where is the Charge I Need? The screen will only show unpaid charges that are at least partly personal. Paid charges or charges that have no personal balance will not appear. If you can not find the charge you expected to see, press [**F8** -- *Show Insurance*] to view both insurance and personal charges. You can also press [**F6** -- *Correct Mistakes*] or [**F7** -- *Family Editor*] (from which you can run a Collection report or Family History report) to analyze the account and find out when the charge was paid off.

Step 6: **If Necessary, Indicate How to Apportion the Payment**

If you selected charges that exceed the value of the payment, you can use the next screen to indicate how much of the payment should be applied towards each charge.

```
ALL DUE charges for Account: Fred Flintstone   Date of Payment: 03/08/06
Acct Status: Budget
    DATE     CODE       PROCEDURE       CHARGE    APPROVED  PAYMENT   ADJUST   BALANCE
08/20/05   99392 Well Child 1-4 yrs  $   37.00 $   37.00 $   37.00          $    0.00
09/19/05   99214 OV Detailed H&E     $   87.00 $   87.00 $   10.00          $   77.00
10/30/05   90658 Influenza Vac 36m + $   15.00 $   15.00 $   15.00          $    0.00
           99211 OV Minimal          $   20.00 $   20.00 $   20.00          $    0.00
           90471 1 Immuniz Admin W/O $   10.00 $   10.00 $   10.00          $    0.00
11/15/05   99213 OV Expanded Focus   $   56.00 $   56.00 $   56.00          $    0.00

                         TOTALS: $  225.00 $  225.00 $  148.00          $   77.00

   Payment Type: Personal Check Paymen

                              Check Number: 3344


    Save       View       View
  Payments    Account    Patient
```

Customized Behavior: You can configure Partner to automatically distribute the payment among the charges or to apply the money towards the oldest charge first. Contact PCC for more information.

Step 7: Press [F1 -- *Save*]

Press **F1** to save your payment and return to the main **pam** screen. Your payment has been posted, and you will see the updated "New Balance" column.

4.2. Posting Payment Screen

When you first run **pam**, it asks you for an account name. Once you have found an account, you are presented with the payment-entry screen:

This screen contains useful demographic information for the account, provides links to several other Partner programs, and allows you to begin posting a payment by entering information in the available fields.

The demographic information includes account name and contact information. You can also review the Status field, which may list important billing statuses for the family, such as "Overdue" or "Bad Check." The screen also shows you a list of dependents to the family and a balance summary, aged by transaction date, for Personal, Insurance, and Medicaid balances on the account.

Look-Up Fields: Both the "Payment/Adjustment" field and the "Provider" field are look-up fields. You can enter an abbreviation or use an asterisk (*****) to look at a list of possible entries. Common answers for the "Payment/Adjustment" field are "Personal Check," "Cash," or "Courtesy Adjustment."

More Demographic Information: Press **Page Down** to view a quick summary of other account demographic information, including insurance information and recent account notes. You can press **Page Up** to return to this screen. You can also press [**F7** -- *Family Editor*] to run **fame** and make changes to the account information.

Link Payments: Whenever you post a payment, you should use **pam**'s *Link Payments* feature to link payments to the particular charges they are paying off. In other words, you should *specify* for which charges the payment is intended. If you *don't* press [**F4** -- *Link Payments*], and press **F1** to save the payment, you will be posting an unlinked or open-item payment. Open-item payments are still applied towards the account's oldest personal

balance, but they may float around on an account, making it difficult to track and understand an account's history and remaining balance.

New Balance: Once you have posted a payment, the final column in the balance summary, "New Bal" will be updated with the accounts new outstanding balance:

Posting Personal Overpayments/Credits: Posting a personal overpayment in Partner is simple. Use **pam** to post a payment and do not press [**F4** -- *Link Payments*]. The account will have a credit, which you can then refund or leave on the account until the next visit. The credit will automatically be applied to any outstanding balances on the account, and you can link it to the charges by running **oops**.

Get a Receipt: Select "Print receipt for this payment" to generate a paper receipt when you press **F1**.

Function Keys

[**F1** -- *Save*]

Press [**F1**] to save any payments you have entered as open-item payments and quit **pam**. You can then enter a new account name or press **F12** to quit and run a different program. If you have entered a payment amount, you should consider pressing [**F4** -- *Link Payments*] and assigning the payment to specific charges before pressing **F1**.

[**F3** -- *Post a Refund*]

Press **F3** to run the **refund** program. Use **refund** to post refunds or any other adjustments that take money away from an account or increase the balance.

[**F4** -- *Link Payments*]

Press **F4** after entering a payment type (and check number, if desired) to select outstanding charges to which the payment should be applied. If you post a payment without using **F4**, it will be an open-item payment that Partner will automatically apply to the oldest unpaid charge.

Function Keys While Specifying Payments: On the first Link Payments screen, function keys are available to batch claims, print paper claims, print bills, run **oops**, and run the Family Editor (**fame**).

[**F5** -- *Print a Bill*]

Press **F5** to print a paper bill, for any desired date range, for the account.

[**F6** -- *Correct Mistakes*]

Press **F6** to run **oops**, the "Correct Mistakes" program. In **oops**, you can change the pending status of charges, delete payments or charges, and adjust various visit information. If you need to link or unlink payments from charges, run **oops**. For full documentation on **oops**, read *Correct Mistakes*.

[**F7** -- *Family Editor*]

Press **F7** to run **fame**, the Family Editor. In **fame**, you can change account demographic information, including mailing address and insurance policy information. The Family Editor also provides access to the *Collection Report*, which can help you understand an account's outstanding balances. For full documentation on **fame**, read *Editing Patients and Accounts*.

[**F8** -- *Acct History*]

Press **F8** to run **tater**, the Account History report. This report, which can be restricted by date and type of transaction, shows you a history of all transactions on an account.

5. Turn an Account Over to Collections

With a firm financial policy and good use of Partner's personal billing tools, you should have very few accounts that require a collection agency. When you need to use one, however, you should indicate in Partner that the account is in collection.

PCC has two recommended procedures for turning an account over to a collection agency in Partner. Your office should consider both possibilities and create your own collection policy.

What Charges Should be Turned Over to Collection? You can review accounts with high personal balances using **persview**, and **srs** can produce a list of accounts with charges that have been billed over and over again. Contact PCC support for help learning these reports.

5.1. Option A: Adjust Off the Charges

The easiest way to turn charges over to collection is to post an adjustment against those charges. The charges will no longer generate a bill, and the amount due will be removed from your accounts receivable.

The steps below require a bad debt adjustment in the Payment Types table in the Table Editor (**ted**). You could name the payment type "Bad Debt Adjustment (Collections)" or "Sent to Collection".

Follow these steps to turn an account over to collection:

Step 1: Print Charge Information for the Collection Agency

Use the Collection Report (**coll**) or the Account History (**tater**) to produce a summary of outstanding charges for the collection agency.

Step 2: Run pam for the Overdue Account

You can run **pam** from the Daily Operations window or by typing **pam** at a command prompt. Find the account you are turning over to collection.

Step 3: Post the Bad Debt Adjustment and Link it to the Overdue Charges

Enter the bad debt adjustment information, including the date you are turning the account over to collection, the bad debt adjustment name, and the total amount of the charges you are sending to collection:

```
POSTING PERSONAL PAYMENTS                                    Page 1 of 2

 First Name: Fred                        Home Phone: 802-927-8050
  Last Name: Flintstone                  Work Phone: 802-821-7264
     Status: _____

    Address: 479 Cocoa Avenue                        Dependents
            _____       Pebbles Flint        _____
       City: Plymouth                      Dino Flinston        _____
      State: VT        Zip Code: 05056                          _____


     AGING:     0-30       31-60      61-90     Over 90     Old Bal     New Bal
  Personal: $   0.00    $   0.00   $   0.00   $ 133.00   $ 133.00   $ 133.00
 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


   Date    Payment/Adjustment Type          Amount    Check #         Provider
 04/28/06 Bad Debt (Collection)          $ 133.00█  _____  _____


  [ Save ] [ Next    ] [ Post A ] [(Special )] [ Print A ] [ Correct  ] [ Family ] [ Acct    ]
           [ Account ] [ Refund ] [(Payments)] [ Bill    ] [ Mistakes ] [ Editor ] [ History ]
```

Press [**F4** -- *Special Payments*] and link the bad debt adjustment to the procedures listed that you wish to turn over to collection. To learn more about **pam** and the Special Payments key, read *Post Personal Payments and Adjustments*.

Step 4: Record Your Actions in fame

Run **fame** for the account and add details to the Notes page. Record which charges were sent to collection. You should also add a "Sent to Collection" status flag to the account.

When you receive a payment from the collection agency, you can post it in one of two ways:

- Delete the adjustment you posted above 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**.

Whichever method you use, be sure and carefully note your actions on the notes page of the Family Editor.

5.2. Option B: Pend the Charges to a Collection Agency

You can pend charges to a collection agency just as you would pend them to an insurance company. The family will no longer receive personal bills from your practice, and the collection agency will bill the account directly. The advantage of this method is that the charges you turn over to the collection agency will remain as balances on the patient's account.

For this procedure to work, you will need two items in your Partner tables:

- An insurance group named "Collections"

- An insurance company called "1. Collections." While you can name the insurance company anything, giv-

ing it a number at the beginning of its name will make it easier to find and apply charges towards.

Follow these steps when an account is turned over to collection:

Step 1: Print Charge Information for the Collection Agency

Use the Collection (**coll**) report or the Account History (**tater**) to produce a summary of outstanding charges for the collection agency.

Step 2: Run oops

Run Correct Mistakes (**oops**) from the Daily Operations window, or type **oops** at a command prompt.

Step 3: Locate the Procedures to Turn Over to Collections

Use **Page Up** and **Page Down** to browse the account history and find the procedures that should be passed to collection.

Step 4: Press [F4 -- *Insurance Status*] and Enter the Procedure Numbers

```
33)              12/09/05 Ins Pmt -- Keystone HPC

Correcting Fred Flintstone.   Balance is $ 438.00
There are 714 more charges or payments.
Type in the numbers of items to edit  21, 23, 28
```

Enter the number adjacent to each procedure you are sending to collections.

Step 5: Press [F5 -- *Make All Insurance***]**

On the Changing Insurance Information screen, press **F5** and choose "Some Other Insurance."


```
                    Changing Insurance Information           Page 1 of 1
                             Fred Flintstone

        DATE      PATIENT     + Keystone HealthPlan $0/0 CHIP        SUM DUE
    21 12/04/05   Pebbles     - ~No Insurance                        87.00
       Acc:  No      Insurance  - Health America HMO $10/20
    23 11/28/05   Pebbles     - BCBS $15 OV&WC-other                 87.00
       Acc:  No      Insurance  Some Other Insurance
    28 11/24/05   Dino                                               56.00
       Acc:  No      Insurance:                    Copay:


     Save                                  Make All  Make All  Make All  Make All
     Changes                               Insuranc  Personal  Medicaid  Not Med
```

Step 6: Choose "1. Collections"

The collections insurance will appear at the top of the list. Press **Enter** to select it.


```
1. Collections
Access MA
Aetna EPO $10 Box  91522/P.O. Box 91522/Arlington/TX/76015-0022
Aetna EPO $15 Box  91522/P.O. Box 91522/Arlington/TX/76015-0022
Aetna MC $10 Box 1125/PO Box 1125/Blue Bell/PA/19422
Aetna MC $15 Box 1125/PO Box 1125/Blue Bell/PA/19422
Aetna MC $15;Full WC/PO Box 1125/Blue Bell/PA/19422
Aetna MC $25/PO Box 1125/Blue Bell/PA/19422
Aetna MC $5 Box 1125/PO Box 1125/Blue Bell/PA/19422
Aetna PPO $0/PO Box 981106/El Paso/TX/79998-1106
```

Step 7: Press [F1 -- *Save Changes*]

```
          Changing Insurance Information          Page 1 of 1
                    Fred Flintstone

      DATE      PATIENT      PROCEDURE NAME      DIAG    P    AMOUNT    SUM DUE
 21 12/04/05P  Pebbles    Medication Follow Up  314.01  W    87.00     87.00
    Acc:  No      Insurance: 1. Collections          Copay:
 23 11/28/05P  Pebbles    OV Detailed H&E       309.81  W    87.00     87.00
    Acc:  No      Insurance: 1. Collections          Copay:
 28 11/24/05P  Dino       OV Expanded Focus     382.9   G    56.00     56.00
    Acc:  No      Insurance: 1. Collections          Copay:




    Save                                    Make All  Make All  Make All  Make All
    Changes                                 Insuranc  Personal  Medicaid  Not Med
```

After saving your changes, press **F12** to quit **oops**.

Step 8: Record Your Actions in fame

Add a note to the Notes screen of the Family Editor (**fame**), add a "Collection" status flag to the account, and send the account a collections notification form letter.

Run insaging: Periodically, run Insurance Accounts Receivable Summary (**insaging**) to review the outstanding balances in collections. The amounts should appear in the Collections insurance group.

Run inscoar: Periodically, run Insurance Accounts Receivable Detail (**inscoar**) for the Collections insurance group to review each individual account's collection amounts.

When you receive a payment from the collection agency, you can post it in the **pip** program, selecting an appropriate payment type. You should also update your note on the notes page of **fame**.