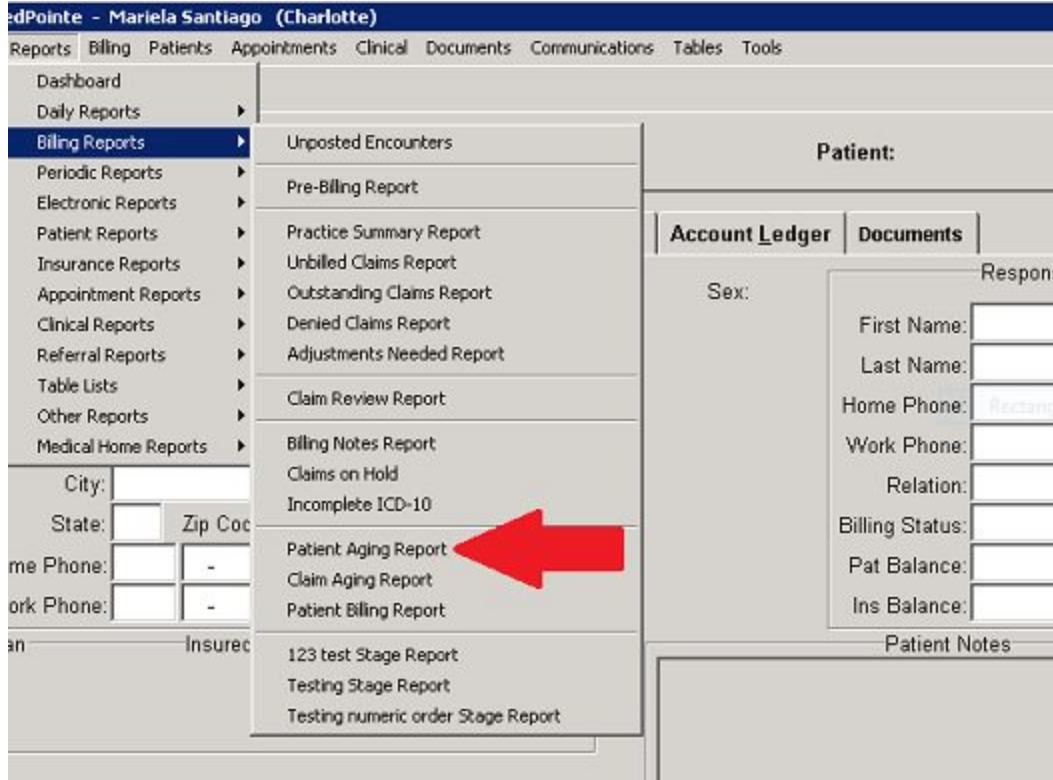
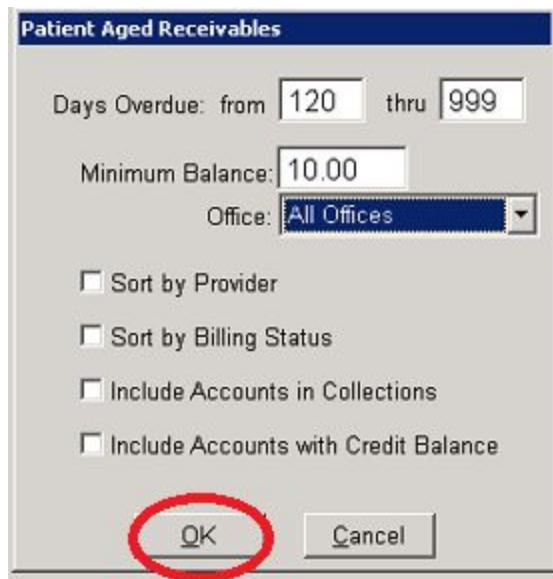


Collections

From Patient Activity screen, go to **Reports, Billing Reports, Patient Aging Report.**



Patient Aged Receivables window will appear. **Fill in per office requirements.**
Example below: over 120 days past due with a minimum balance of \$10 to collections.
Leave boxes unchecked.



Print Patient Aged Receivables Report

AR Testing Corp

Patient Aged Receivables Report

Days Overdue: from 120 thru 999

Minimum Balance: \$10.00

Patient	Account	Phone	Total	Current	30 Days	60 Days	90 Days	120 Days
A John	11483	631-335-	20.00	0.00	0.00	0.00	0.00	20.00
A Jonalhan	12304	631-539-	155.00	0.00	0.00	0.00	0.00	155.00

Use this report to transfer patients to collections.

Click on **Responsible Party Tab** for selected patient.

The screenshot shows a web-based medical software interface. At the top, there is a navigation menu with options like 'File', 'Reports', 'Billing', 'Patients', 'Appointments', 'Clinical', 'Documents', 'Communications', 'Tables', and 'Tools'. Below this, the 'PatientActivity' tab is active. The main area displays 'Account: 46960' and 'Patient: Testa Test'. A series of icons (question mark, magnifying glass, plus sign, document, and printer) are visible. Below the icons is a tabbed interface with the following tabs: 'Cover Page', 'Patient Info', 'Responsible Party', 'Insurance Plans', 'Account Ledger', and 'Documents'. The 'Responsible Party' tab is highlighted with a red circle. The 'Patient Info' section contains fields for First Name (Testa), Last Name (Test), Address (60 Candylane), City (Fairport), State (NY), Zip Code (14450), Home Phone (585 -), and Work Phone (585 -). The 'Responsible Party' section contains fields for First Name (Testa), Last Name (Test), Home Phone (-), Work Phone (-), Relation (Self), Billing Status (Regular), Pat Balance (200.00), and Ins Balance (0.00). At the bottom, there are sections for 'Plan' and 'Patient Notes'.

In **Billing Info** box, change **Billing Status** to **Collections**. Save.

The screenshot shows the MedPointe software interface for patient Mariela Santiago (Charlotte). The 'Billing Info' section is active, and the 'Billing Status' dropdown menu is open, showing 'Collections' as the selected option. The 'Save' button is also circled in red.

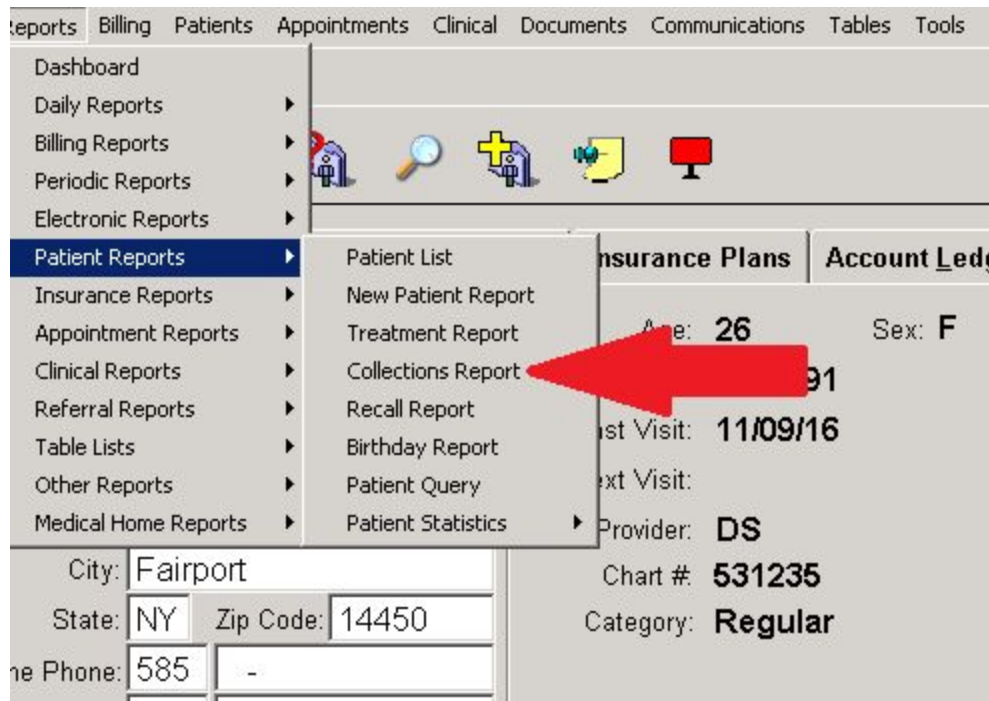
Responsible Party Data		Billing Info	
Title:		Billing Status:	Collections
First Name:	Testa	Fee Schedule:	Collections
Last Name:	Test	<input type="checkbox"/> Patient is n	Regular
Address:	60 Candylane	<input checked="" type="checkbox"/> Apply Servi	Write-In Patient
cont'd:		<input type="checkbox"/> Hold Statement	
City:	Fairport	<input type="checkbox"/> Hold Aging Message/Letter	
State:	NY	<input type="checkbox"/> Portal Statement Only	
Zip:	14450	<input type="checkbox"/> No Co-Payments	
Home Phone:	585 -	<input type="checkbox"/> Account is Inactive	
Work Phone:	585 -	<input checked="" type="checkbox"/> Flagged to Receive Statement	(Last Statement: 10/18/16)

A pop up will notify you that "Account has been transferred to collections as of today." OK



Printing report for Collection Agency.

Reports, Patient Reports, Collections Report.



A **Collections Report** window will appear. Fill in as office requires. Can leave as is if first time running it. Change dates if running report on a monthly basis. OK.

The 'Collections Report' dialog box has a title bar with the text 'Collections Report'. It contains the following fields and options:

- Billing Status: Collections (dropdown menu)
- Status Date: from // thru // (date input fields)
- Classification: All Classifications (dropdown menu)
- Category: All Categories (dropdown menu)
- Regular Provider: All Providers (dropdown menu)
- Office: All Offices (dropdown menu)
- Sort by: Alphabetical Account #
- Buttons: OK, Cancel

Print. Send to Collection Agency.

*You will also need this report to write off the amount sent to collections. If your office policy is to do this so it no longer appears in your A/R, proceed with the following:

Cover Page will now show **Billing Status** as Collections. Click on **Charge** button.

Account: 46960 Patient: Testa Test

Account Page	Patient Info	Responsible Party	Insurance Plans	Account Ledger	Documents
Patient Info First Name: Testa Last Name: Test Address: 60 Candy Lane City: Fairport State: NY Zip Code: 14450 Home Phone: 585 - Work Phone: 585 -		Responsible Party Age: 26 Sex: F Date of Birth: 01/01/91 Last Visit: 11/09/16 Next Visit: Provider: DS Chart #: 531235 Category: F		Responsible Party First Name: Testa Last Name: Test Home Phone: - Work Phone: Relation: Self Billing Status: Collections Pat Balance: 200.00 Ins Balance: 0.00	
Insured Party Name: Testa Test ID: 125464698		Patient Notes			

Charge Payments Walk-Out Employer Exit

Double click on claim you are sending to collections. There may be more than one. You will need to do each one separately.

atient Info Age: **26** Sex: **F** Responsible Party

esta **Select Claim** ta

Date	Claim #	Prv	Ins	Billed	Ins Bal	Pat Bal	Balance
11/09/16	520124	DS	MEDIC	12/22/16	0.00	200.00	200.00

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85 **New Claim** **Closed Claims** **Cancel** **200.00**

85 - Ins Balance: 0.00

Insured Party ID

Testa Test 125464698

Patient Notes

Charge **Payments** **Walk-Out** **Employer** **Exit**

Click on **Courtesy** button.

Claim Data

Account #	46960	Testa Test	Claim #	520124
Pat Bal:	200.00		Pat Bal:	200.00
Ins Bal:	0.00		Ins Bal:	0.00

Transactions | Billing Info | Other Info | Remittance | Billing Notes | Visit Note

Date	Prv	Proc	Mod	Description	Diag	Units	Amount	Ins
1/09/16	DS	99213		Office Visit Moderate, Est pt	a	1.00	128.00	•
1/09/16	DS	71020		Chest 2 View	a	1.00	72.00	•
1/03/17	DS	TRANS		Transfer to Patient		1.00	200.00	

Add Delete Exit

Adjustments

Ins Write-Off **Courtesy** Discount Bill Pat Transfer Co-Payment Apply Credit Bill Ins

Charge Payments Walk-Out Employer Exit

Change to **Collection Write-off** in drop down and make sure amount is correct. Save. Exit.

Courtesy Write-Off

Description	Amount
Courtesy Write-off	200.00

- Courtesy Write-off
- Adjust to allowed amount
- Collection write off**
- Contractual Adjustment
- Courtesy Discount
- Insurance Write-off
- Payment Discount

Adjustments

In **Account Ledger**, check to see Amount written off against correct claim. Balance on **each claim** needs to be written off! These should equal the total patient balance you transferred to collections. Exit.

Account: 46960 Patient: Testa Test

Account Ledger

Date	Prv	Proc	Description	Diag	Units	Patient	Insurance
1/09/16	DS	99213	Office Visit Moderate, Est pt	S93.409	1		128.00
1/09/16	DS	71020	Chest 2 View	S93.409	1		72.00
1/03/17	DS	TRANS	Transfer to Patient			200.00	-200.00
1/03/17	DS	COLL	Collection write off			-200.00	
Totals						0.00	0.00

Current	30	60	90	120	Total
0.00	0.00	0.00	0.00	0.00	0.00

Print View Exit

**If your office decides to see patient again once they are in collections and they are making a payment, you can reverse collection status and write-off. Charge collection fee per office policy.