



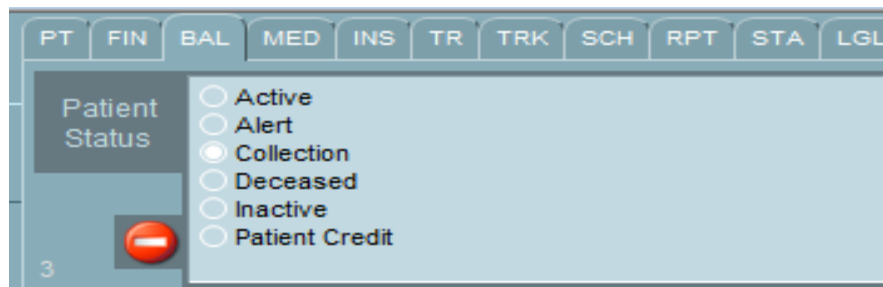
Collections Reports – Patient Level Printed only / Claim Level Printed and Electronic file versions

Patient Query, Patient Level Collections Report (Printed only)

- Go to the **Reports / Query** menu and select **Patient Query**.
- Click the red minus icon to clear the query



- Select the **BAL** tab.
- Under “Patient Status”, select “Collection”.

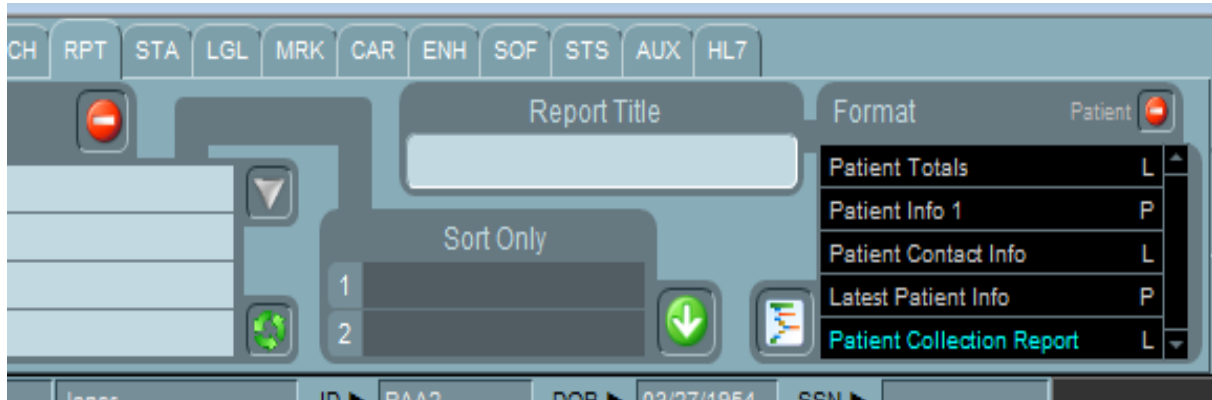


- Click the blue down arrow.



- Select the **RPT** tab.
- Under “Format”, select the “Patient Collection Report”.

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- Click the **Report** icon to view and print the report.



Collections Report Claim Level

Claim Query, Collections Reports by TR (Transaction), CLM (Claim), PT (Patient) breakdowns

*Claim reports do not include any payments that are unapplied payments. They must be applied.

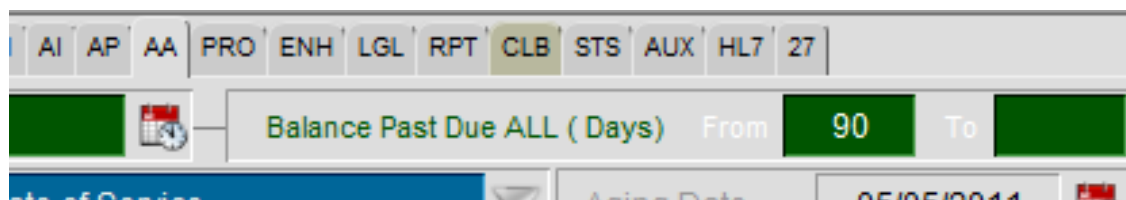
- Go to the **Reports / Query** menu and select **Claim Query**.
- Click the red minus icon to clear the query



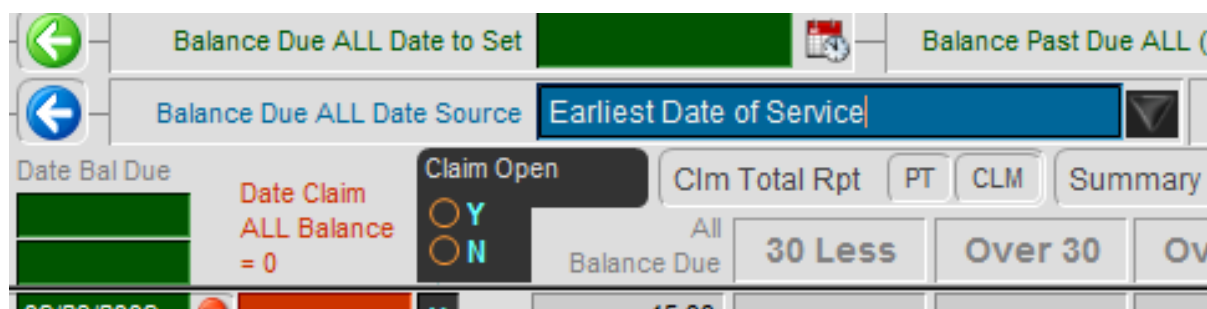
- On the **Claim Query** screen select the **AA** tab. For claims including insurance and patient balances over 90 days, for example, enter “90” in the “From” field of

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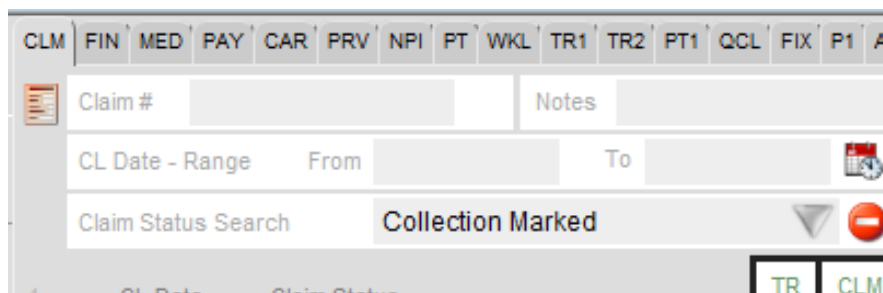
“Balance Past Due ALL (Days)”. Or, select AP for claims with only patient balances.



- When doing any type of aging reports by claim, always be sure to choose how you want aging to be calculated by selecting from the drop down list next to "Balance Due ALL Date Source" and then updating the found set by clicking the blue arrow to the left of this field.



- On the **AA** or **AP** tab, click “Y” on “Claim Open” for Open Claims to eliminate any claims where the Claim Status has been changed to “Closed”.
- Then go to the **CLM** tab and choose, for example, Claim Status Search and set it to “Collection Marked.” This will pull up all claims that are marked for collections with balances that are over 90 days past due.



- Click the blue down arrow to perform the search.

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- Choose a “Collection Action” of “TR”, “CLM”, or “PT” to create a printed or electronic file report for the collection agency. This will create a processing event and change the claim status from “Collection Marked” to “Collection Sent” automatically. The processing event will be found on the **Processing** tab of the **Patient** screen and the **Claim** screen.

Patient: PAA2, Balance: 434.00, Jones, Jonathan

Information Insurance Guarantor Attorney Employer Referral Appointments Claim Ledger Transaction Ledger Processing Link

View This Superbill
View This Statement Batch
View This Custom Form
View This Patients Statement
View This Letter

Date	Processing Type	Processing Status	Letter / Form Title
05/05/2011	Collections		
03/31/2011	Statement		
03/23/2011	Superbill		

Entry Ledger Processing Jones, Jonathan

Carrier: 800-225-4816, Fax: [Redacted]
U1010 Tricare
 P.O. Box 870030 Myrtle Beach, SC 29587

Claim Processing Events

Create new Claim Processing Event Custom Form

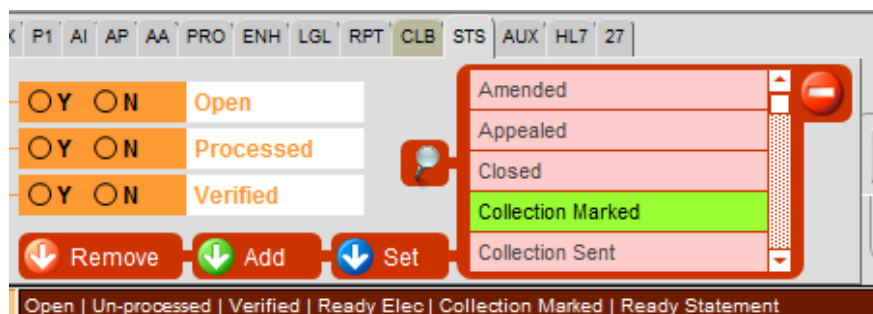
Date	Claim Processing Type	Show
05/05/2011	Collections	IP CO
03/23/2011	Superbill	IP CE

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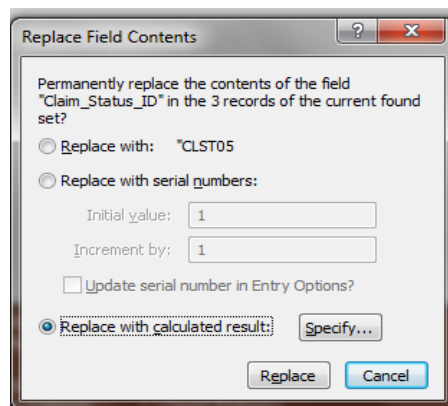
- If you want to see the reports and not create an event or change the status, use the “Report Only” button. We recommend doing this so you can see a sample of the reports.



- To update the status of the items in your found set from “Collection Marked” to “Collections Sent” go to the **STS** tab.
- Click the red minus icon next to the list of statuses to unselect all the statuses. This step is very important! Then click on the “Collections Marked” status and select “Remove”

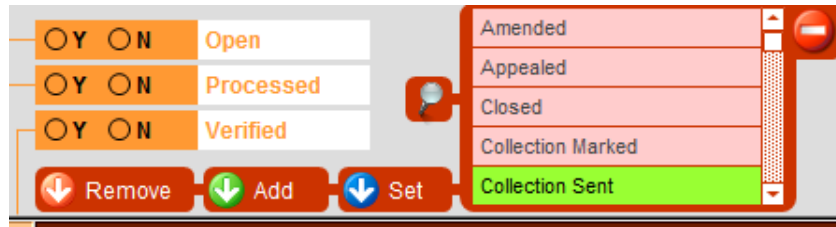


- This action will activate a warning message to make sure that you want to update all of the records in the found set with the selected statuses. If you have more than one status selected, they will ALL BE REMOVED. Click “Replace” to continue, or “Cancel” to cancel the status update.



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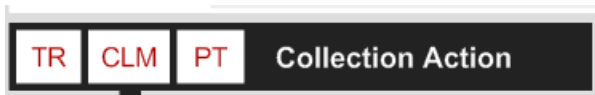
- Finally, unselect “Collections Marked” and select the “Collections Sent” status. Then click “Add” to add this status to the found set.



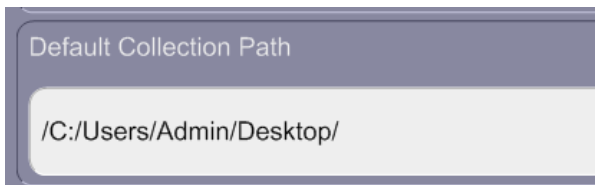
Collections Report Claim Level - Electronic File for IMS Pro.

Important Note: You must sign with IMS Pro before sending Electronic Collections reports.

- On the Claim Query screen, **CLM** tab, click the TR, CLM or PT in “Collection Action” to create a file to send to IMS Pro for Artech collections.



- The “Default Collection Path” must be set for each user in **Provider/Team** menu, **Preferences** tab, **Path** tab.



- When the “Collection Report” screen appears, click the blue arrow (top right) to go to the event **Process Builder** screen.

Collection Report Friday, December 31, 2010

Date	Type (1 Pri 2 Sec 3 Ter Insurance P Patient)	Provider	Charge			Adjust-ment	Payments		Line Balance
			Unit	Total	Qty		Applied	TR	
10/04/2010	97080	GCS	45.00	45.00	1			CL	45.00
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <p>Claim ▶ 10/04/2010 ID ▶ CLA102 Fac ▶ NM</p> <p>Rendering ▶ Smart, G., MD</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>45.00</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Referring ▶ Robinson, Jack, MD</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Days Past Due ▶ 248</p> </div> <div style="text-align: right;"> <p>45.00</p> </div> </div>									
02/12/2011	98942 Manipulation Spine 5+	GCS	45.00	45.00	1			CL	20.00
02/12/2011	97014 Electrical Muscle Stimulation	GCS	45.00	45.00	1			CL	0.00
06/09/2011	P CH #123	GCS			1		25.00	PL	

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- On the **Process Builder**, click the **Export** button.

The screenshot shows the 'Process Builder' interface with the 'Type' set to 'Collections' and the 'Date' set to '06/09/2011'. The file name 'A289' is displayed in the top right corner. The 'Export' button is highlighted in green. Below the navigation tabs, there are two main data tables: 'Claims' and 'Transactions'.

Claims			Transactions						
Date	ID	Patient	Date	ID	TR	CPT	Claim ID	CHG	AMT
08/24/2009	CLA5	Cassidy, S. .	08/24/2009	TRA4	CL	98941	CLA5	35.00	
08/25/2009	CLA6	Cassidy, S. .	08/25/2009	TRA7	CL	99212	CLA6	135.00	
08/26/2009	CLA7	Cassidy, S. .	08/25/2009	TRA8	CL	97014	CLA6	265.00	
08/25/2009	CLA8	Cassidy, S. .	08/26/2009	TRA9	CL	99212	CLA7	45.00	
08/25/2009	CLA9	Corbett, R. A.	08/27/2009	TRA19	CL	98941	CLA11	35.00	
08/27/2009	CLA11	Corbett, R. A.	09/01/2009	TRA22	CL	98942	CLA13	45.00	
08/31/2009	CLA12	Corbett, R. A.	09/01/2009	TRA23	CL	97014	CLA13	45.00	
			08/31/2009	TRA29	CL	11006	CLA12	45.00	
			08/31/2009	TRA30	CL	97014	CLA12	45.00	
			08/25/2009	TRA32	CL	0074T	CLA9	135.00	
			08/25/2009	TRA33	CL	98941	CLA9	35.00	
			09/04/2009	TRA34	CL	98942	CLA14	45.00	

- The file name appears in the upper right of the screen, i.e. A289 and will be saved in the "Default Collection Path". Previous arrangements must be made with IMS Pro.