TIPS & TRICKS IN CONNECT:
Working the Collections Queue

Introduction

The **Collections** page allows you to monitor guarantor accounts flagged as internal collections by guarantor or insurance responsibility.

Internal collections is an automated process based on rules defined in Collections Admin. Collection rules for guarantor and insurance collections determine when a guarantor account goes from active to collection status. Past due accounts are automatically transferred to internal collections based on these rules. Collection rules also determine the internal collector / collector group to which the account is automatically assigned. Once an account is in collection status, it will remain there until the outstanding balance goes to zero.

Use collection tasks to manage the internal collection efforts on accounts in either insurance or guarantor financial responsibility. Tasks in the Insurance Queue are at a service line level, while tasks in the Guarantor Queue are at an account level.

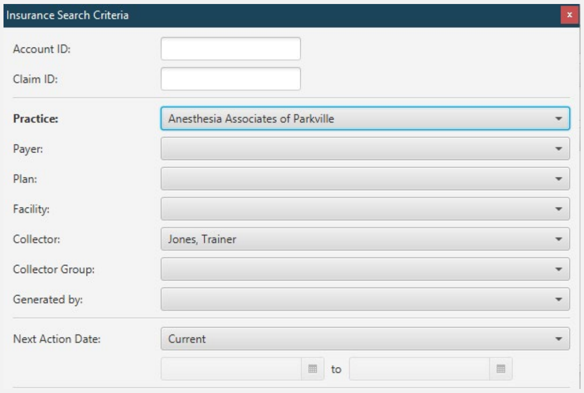
The key to the collection process is setting up future actions and their schedules. Through collection tasks, you can assign new task actions by insurance and guarantor, print and re-print demand letters, automate task processing by insurance and guarantor, and reassign collection tasks in mass.

Managing the Collections Queue

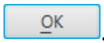
Searching

To search and locate guarantor accounts in collections.

Step-by-Step Guide

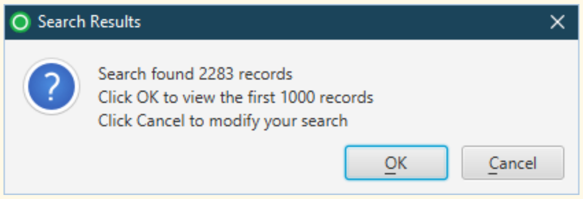
STEP	INSTRUCTIONS	SCREENSHOTS
1	Open the **Manage** menu and select **Collections.**	
2	Click the **Insurance** or **Guarantor** tab.	
3	Click **Search.**	

TIPS & TRICKS IN CONNECT:
Working the Collections Queue

STEP	INSTRUCTIONS	SCREENSHOTS
4	Enter search criteria and click  . **Note:** By default, the **Collector** is set to the user logged in and the **Next Action Date** set to *Current*. These default values can be changed, as well as any of the other available fields.	
5	Once the Search query is complete, your Collections queue will be populated. ***Run the Search query as many times as needed to review all Current records found.***	

Key Points

❖ If Search Results found more than 1000 records, Click Cancel to modify your search by adding Facility, Payer, Payer/Plan, etc. criteria, until no warning is presented.

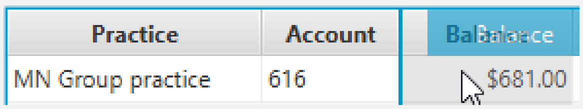


Customize Columns

Columns can be rearranged, resized, and added/removed from the table at the top of the page.

Step-by-Step Guide

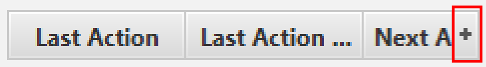
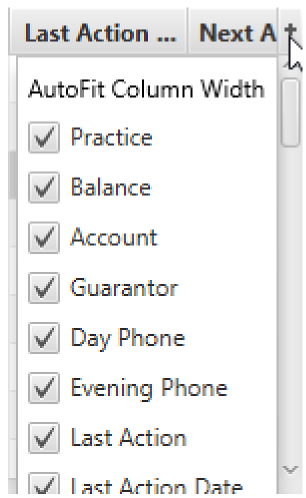
REARRANGE COLUMNS

STEP	INSTRUCTIONS	SCREENSHOTS
1	Click the column header of the column being moved and drag it to the left or to the right.	

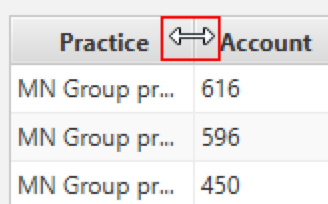
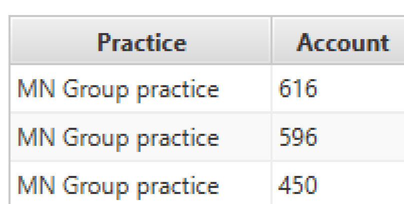
REARRANGE COLUMNS

STEP	INSTRUCTIONS	SCREENSHOTS
2	Release the mouse when the column is moved to the location you want.	

ADD/REMOVE COLUMNS DISPLAYED

STEP	INSTRUCTIONS	SCREENSHOTS
1	Click the + at the end of the header row of columns.	
2	A list of available columns displays. Select or de-select a column name to add or remove it from the table display.	

RESIZE COLUMNS

STEP	INSTRUCTIONS	SCREENSHOTS
1	Click the right border of the column you want to resize. The cursor changes to the following image: ⇔	
2	Move the column to the left or to the right. The column width is resized.	

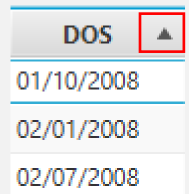
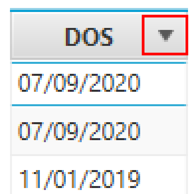
Sorting Query Results

Sorting options allow the list of collection information to be sorted by multiple columns including **Balance**, **DOS**, and **Payer/Plan**.

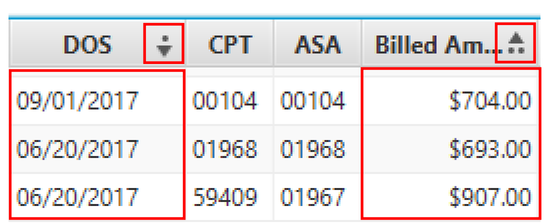
A queue can be sorted by primary and secondary measures, in either ascending or descending order.

Step-by-Step Guide

PRIMARY SORT

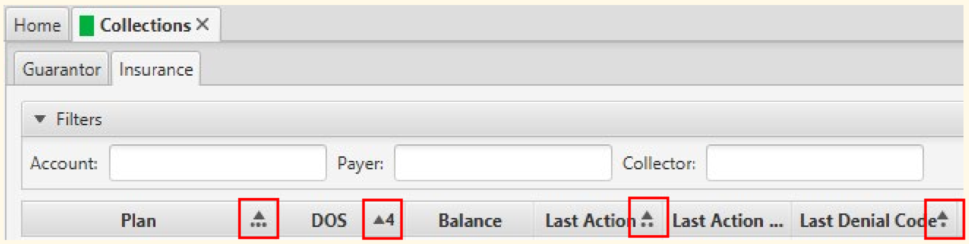
STEP	INSTRUCTIONS	SCREENSHOTS
1	Single-click the header to sort Ascending.	
2	Double-click the header to sort Descending. **Note:** *When list is sorted Descending, single-click the header again to remove the sort.*	

SECONDARY SORT

STEP	INSTRUCTIONS	SCREENSHOTS
1	Complete the Primary Sort, as detailed in the steps above.	
2	Hold down the **CTRL+SHIFT** keys and click the header of the column of the secondary measure: • Single-click for Ascending • Double-click for Descending	
3	Repeat Step #2 to continue adding additional secondary sort criteria.	

Key Points

- The field sort order can be determined by reviewing the number of dots above or below the sort action arrow. If more than three fields are sorted, the number will be reflected via a numeric value.
- In the example below, the order of sorting is **Last Denial Code** (Primary), **Last Action, Plan,** and then **DOS.**



Working the Collections Queue

Once the Collections queue is populated and sorted, tasks are worked. Selecting a line item to provides access to a number of sub-tabs for reviewing, and creating actions/notes against it.

Insurance Sub-Tabs

The Insurance sub-tabs are available for reviewing General, Service Line Details, Account Notes and Collection Actions.

The **General** and **Service Line** tabs include hyperlinks to the **Guarantor**, **Patient**, **Account**, and **Case**.

Navigation: Insurance Sub-Tabs

- **Collections** page **> Insurance** tab > search and filter records > select record > navigate to sub-tabs

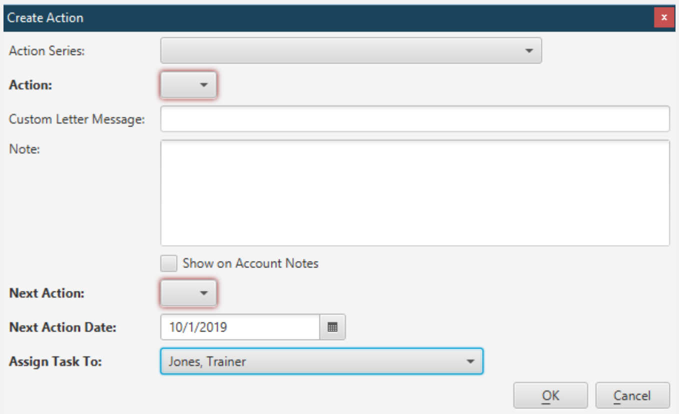
Key Points

- The **Insurance** sub-tabs are a snapshot of the Account Detail. For full details, click the **Account** link on the **General** tab or click the **Account** button from the **Insurance** tab at the top of the page.

Creating Collection Actions

Review the account and determine the appropriate action to create.

Step-by-Step Guide

STEP	INSTRUCTIONS	SCREENSHOTS
1	Select the service fee line you want to add an action. **Note:** *You can press CTRL+SHIFT and select multiple lines to create the same action.*	
2	Open the **Collection Actions** sub-tab.	
3	Click **Create.** The **Create Action** window opens.	
4	Open the **Action** dropdown field and select the current action taken against the service line. **Note:** *The **Next Action, Next Action Date,** and **Assign Task To** field are auto-populated based on the **Action** selected.*	

STEP	INSTRUCTIONS	SCREENSHOTS
5	Enter a brief **Note** explaining the action outcome.	
6	[Optional] Select the **Show on Account Notes** option to backfill the note to the patient account notes.	
7	Click **OK** to complete the Create Action activity and remove the task from the *Current Next Action* status.	

Rebill Claims

Complete one of these tasks to rebill a claim from within the Collections Queue.

Rebill	*Action*	*Supporting Help Topic*
REBILL 1	New Original Claim	Rebilling Claims with Fee Changes
REBILL 2	Corrected Claim	Rebilling Claims without Fee Changes
REBILL 3	Voided Claim	Voiding Claims Sent in Error

Frequently Asked Questions

Why isn't my task disappearing from my queue?

- There is likely a letter to be printed. Once the collection letter is printed, the task should no longer be listed.
- To check for a letter, open the **Collections Actions** sub-tab.

How do I find my oldest Dates of Service in the queue to work first?

Utilize search criteria options to locate your oldest dates of service:

- Days Outstanding
- Dates of Service Range

How can I save my customized column view to display next time I access the Collections page?

You must click the **Close** button and not X out of the page in order to save column customizations.