

Collections Admin / Collector Groups Tab

Overview

The **Collections Admin** pages are comprised of seven tabs:

- [Actions & Action Series Tab](#)
- [Collector Groups Tab](#)
- [Guarantor Collections Tab](#)
- [Insurance Collections Tab](#)
- [Denial Collections Tab](#)
- [Pre-Collections Tab](#)
- [External Collections Tab](#)
- [Collection Letters Tab](#)

The **Collector Groups** tab is used to create groups of collectors for distribution of guarantor, insurance, and denial collection tasks. How to Get Here?

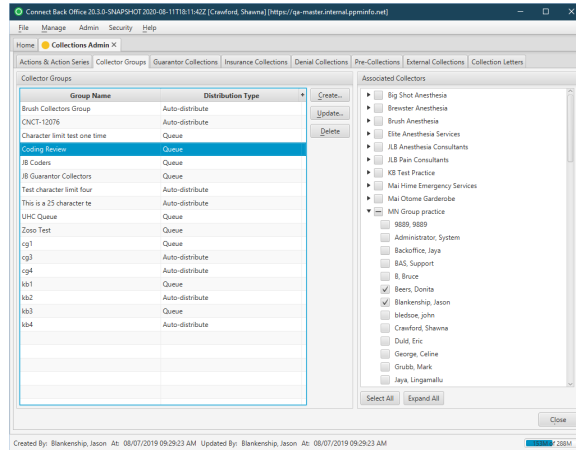
To open the **Collector Groups** tab:

From the Home Page:

1. Click **Collections Admin** from the **Admin** list.
2. Click the **Collector Groups** tab.

From the Menus:

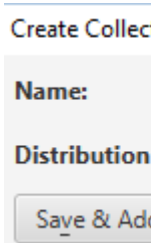
1. Open the **Admin** menu and select **Collections Admin**.
2. Click the **Collector Groups** tab.





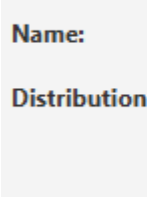
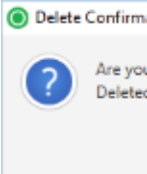
Field Definitions

Field	Type	Required	Description
Collector Groups Section			
Group Name	Display Only <i>(Pulled from created /updated Collector Group)</i>	Yes	The name of the collector group.

Button Descriptions

Field	Shortcut Keys	Description	Step-by-Step
Create	[Alt] + [C]	To create a Collector Group	<ol style="list-style-type: none"> 1. Click Create in the Group window open  <ol style="list-style-type: none"> 2. Enter a Name for t The Name must be 3. Open the Distribu Distribute. 4. Click Save (or Sav

Distribution Type	Display Only <i>(Pulled from created /updated Collector Group)</i>	Yes	The task distribution type for the group.  Auto Distribute will auto-distribute tasks evenly among group team members. <ul style="list-style-type: none"> For Guarantor, tasks are evenly distributed by collector For Insurance, tasks are grouped by claim and will assign to collector by case (procedures will not be split up) Queue will auto-distribute tasks to a queue that can then be searched in Manage > Collections by team members to see outstanding items and manually take responsibility for the task or reassign to another user.
Associated Collectors Table		No	Defines which users are assigned to which collection group.  The Associated Collectors table is split by practice. Assignments are made by selecting a practice and then selecting the specific user within that practice to associate to the group.

Update	[Alt] + [U]	To update a Collector Group	<ol style="list-style-type: none"> Select the collector, Click Update. The Update Collector dialog appears.  <ol style="list-style-type: none"> Update the Name Click Save.
Delete	[Alt] + [D]	To remove an Action or Action Series	<ol style="list-style-type: none"> Select the collector Click Delete. The Delete Confirmation dialog appears.  <ol style="list-style-type: none"> Click Yes to confirm.

Related Training/Support Documentation

Video:

- [Collector Groups](#)

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