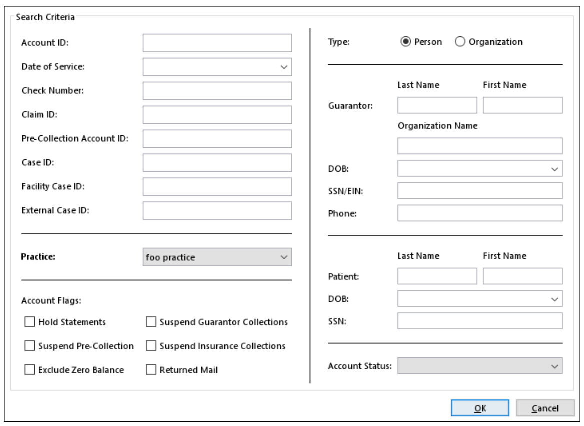
Searching for Accounts

Complete this task to specify search criteria for finding guarantor accounts.

The **Accounts** page also includes a list of **Recently Viewed** accounts opened from the **Accounts** page since the last login. Once the user logs out of Connect Back Office, this information is cleared from the table. Switching practice views will not clear this information.

Step-By-Step Guide

Step	Instructions	Additional Information
1	From the **Accounts** page, click **Search.** The **Search Criteria** window opens.  	Search options restricting search results are inclusive, which means all conditions must be met for the account to be selected and displayed on the **Accounts** page. The more options specified, the fewer search results.
2	Open the **Practice** drop down list and select the practice.	To view all accounts, select *All* in the **Practices** field. The default value for the field is set in **Account Preferences.**

3	To find specific accounts by account number or date of service, specify one or more of the following options, and then click **OK.** • Account ID • Date of Service • Check Number • Claim ID • Pre-Collections Account ID • Case ID • Facility Case ID • External Case ID	**Account ID** - The account number of the guarantor account. To filter accounts by Account ID, type the account number in the space provided. **Date of Service** - The date the service was rendered. To find accounts by Date of Service, type or click the date in the space provided. **Check Number -** The check number recorded on the payment. To find accounts by Check Number, type the check number in the space provided. **Claim ID** - The number for a claim submitted to the payer. To find accounts by Claim ID, type the claim number in the space provided. **Pre-Collections Account ID** - The unique identification number recorded on the service fee line and sent for pre-collections processing. **Case ID** - The unique identification number assigned to a case associated with the desired account. **Facility Case ID** - The identification number assigned to the case by the facility, for example, the hospital medical record. **External Case ID** - The identification number assigned to the case as an additional means of tracking the case.

4	To search by account flags, use one or more of the following options: • Hold Statements • Suspend Guarantor Collections • Suspend Pre-Collections • Suspend Insurance Collections • Exclude Zero Balance • Returned Mail	The options are set through **Account Preferences**. If these checkboxes are selected by default, you can clear the checkboxes to include all accounts. If the checkboxes are not selected by default, you can click them to exclude accounts that fit the checked options. **Hold Statements -** Search results will include accounts that have been selected for holding statements, either at the account level (**General** tab), or service fee line level (indicated by the  icon next to the SVCFE entry of the Active AR). **Suspend Guarantor Collections** - Search results will include accounts that have the **Suspend Guarantor Collections** option checked on the **General** tab. This disallows any service fee line from qualifying for Guarantor Collections, even if the account meets guarantor collections selection criteria. **Suspend Pre-Collections** - Search results will include accounts that have the **Suspend Pre-Collections** option checked on the **General** tab. **Suspend Insurance Collections** - Search results will include accounts that have the **Suspend Insurance Collections** option checked on the **General** tab. This disallows any service fee line from qualifying for Insurance Collections. **Exclude Zero Balance** - Search results will only include accounts that have a balance greater than zero. **Returned Mail** - Search results will include accounts that require follow up because mail has been returned.

<table>
<tr>
<td>5</td>
<td>To search by guarantor, use one or more of the following options:

Type (Default option is set in Account Preferences, but can be overridden.)
Guarantor
DOB
SSN/EIN
Phone

</td>
<td>Type - The guarantor type you are searching for: Person or Organization. By default, this option is set to Peron. If you select Organization, the Last Name and First Name fields are disabled.

Guarantor - The name of the person or organization to search for.

For a person, enter the last name, first name, or both in the spaces provided.
For an organization, type the name of the organization in the space provided.

You can enter a partial name by entering one or more letters of the last name. For example, to find Smith, you can type "sm" and all accounts who belong to a guarantor with the last name beginning with "sm" will be listed on the Accounts page.

DOB - The birth date of the person to find. Type the date of birth in the mm/dd/yyyy format in the space provided. The year is automatically populated with the current year. Do not enter slashes between values.

SSN/EIN - The nine-digit social security number of the person or nine-digit employer identification number of the organization for the account that you are looking up. Enter the social security number in ###-##-#### format. Enter the employer identification number in ##-###### format. Do not enter slashes between the numbers.

Phone - The telephone number of the guarantor. Type the 10-digit telephone number in the space provided. Do not enter dashes between the numbers.</td>
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6	To search by patient, use one or more of the following options: • Patient • DOB • SSN	**Patient** - The last and first names of the patient on the account that you are searching for. You can enter a partial name by entering one or more letters of the last name. For example, to find Smith, you can type "sm" and all accounts who belong to a guarantor with the last name beginning with "sm" will be listed. **DOB -** The birth date of the patient. **SSN** - The nine-digit social security number of the patient for the account that you are looking up. Enter the social security number in ###-##-#### format.
7	Open the **Account Status** drop down list and select an option.	The available options are defined via the **Ad min > Account Status** page.
8	Click **OK.** The search results are listed on the **Accounts** page.	
9	To filter within search results displayed on the **Accounts** page, utilize any of the fields in the **Filter Within Search Results** secti on: • Name • Account • SSN/EIN • DOB • Phone • Show Patient Information The list of accounts are updated as you type values in the filter fields. Clear the filter to display all accounts in the account set.	**Name** - The name of the person or organization to find. **Account** - The account number of the guarantor account. **SSN/EIN** - The nine-digit social security number of the person or nine-digit employer identification number of the guarantor organization. **DOB** - The date of birth of the guarantor. **Phone** - The telephone number of the guarantor whose account you are looking up. **Show Patient Information** - Select this checkbox to hide or show patient information for each guarantor account. By default, this checkbox is not selected unless otherwise specified in **A ccount Preferences**. When this option is not selected, accounts are listed by Account ID. When this option is selected, the patient information is listed under the parent guarantor account.
10	Double-click an account to open the **Act: [ID]** page.	

Related Topics
Accounts
Accounts Page
Act: [ID] / General Tab
Act: [ID] / Active AR Tab
Act: [ID] / Collections Tab
Act: [ID] / Notes Tab
Act: [ID] / External Collections Tab
Act: [ID] / Patient List Tab
Update Person / Person Information Tab
Update Person / Insurance Tab
Update Person / Address History Tab
Update Person / Appointment History Tab
Merging Guarantor Accounts
Generating Demand Statement
Applying Service Line Adjustments
Distributing On-Account Funds
Rebilling Claims with Fee Changes
Rebilling Claims without Fee Changes
Voiding Claims Sent in Error
Refunding Payments
Reversing Charges
Reversing Payments
Reversing Miscellaneous Adjustments
Reassigning Financial Responsibility
Viewing Cases
Viewing Claims
Viewing Payments
Viewing Attached Images
Transferring Service Fee Lines to Internal Collections
Transferring Service Fee Lines to External Collections
Creating Payment Plans
Canceling Pre-Collections on Service Fee Lines
Suspending Pre-Collections Eligibility Status on a Specific Service Fee Line
Holding Statements on Specific Service Fee Lines
Generating the Remit Detail Report

Related Training/Support Documentation
Not applicable for this topic

Search this documentation