

COLLECTIONS CHEAT SHEET

If the family balance is under \$100.00 We will not send it to collections. Instead, we will turn the balance into an uncollectible balance. And the pt will have to pay this portion before having any further services performed in our office. Follow the instructions below to turn the balance into an uncollectible balance.

UNCOLLECTIBLE BALANCE CHEAT SHEET:

Click on the entire family inside the Select Patient box, click on the adjustment tab, add amount owed, change the procedure date to the date of service that is leaving the balance, change the adjustment date to the previous Saturday from today's date (this will ensure that it won't mess up today's reports). Click the down arrow for the provider, select the provider's name that did the work for the date of service. Under the subtractions box select Uncollectable. Down in the Notes section write (must pay this balance) and then type your initials next to that. click ok. This will zero out the balance.

At the top of the page click on the Popup tab, click the down arrow next to Level and select Family, in the Popup Message box type out UNCOLLECTIBLE BALANCE. DO NOT SCHEDULE UNTIL PAID and add today's date, click ok, click close. Click on Family tab on the left side of the screen, double click inside the patient information box. A window will pop up, on the right side click the down arrow next to Billing type, select HXC, click ok at the bottom of the screen. Then click close. Change pt statues on all family members to "inactive" and click the restricted scheduling box.

If balance is \$100 or over, excluding any fees to that total balance, then following the below instructions:

After following the billing cycle completely, and sending a task to the doctor and manager about accounts up for collections follow these processes.

MAKE SURE EACH ACCOUNT HAS HAD THE FOLLOWING:

2 phone calls, one for each notice sent in the mail,
at least one email notice and text message.

DO EVERYTHING YOU CAN TO COLLECT IN OUR OFFICE.

Before sending the account to MIDWEST Fidelity for Little Chompers, check signed health history in images-if signed then we will need to add a 40% collections fee to the account, calculate the initial balance excluding fees, and add 40% in additional adjustment line. from here we will create a virtual statement, click the drop down arrow next to the statement button in OPENDENTAL, select more options, make sure we include all dates of service, HIT PRINT and select the printer BULLZIP PDF PRINTER, Set the account to save in a collections folder with the guarantor as the file name. Do the same for the Guarantors Health History sheet saving in the same folder with the guarantor as the file name. Set account balance as uncollectable.

ADD POP UP TO ACCOUNT THAT STATES **FAMILY IS IN COLLECTIONS AND CAN NOT SCHEDULE BACK UNTIL PAID IN FULL WITH NORTH AMERICAN RECOVERY**