CLIENT ACCESS INSTRUCTIONS

How to Search for an Account: When looking to post payments/adjustments, check status/balance of account, upload a document, use the following instructions below.

- Navigate to left-hand navigation bar, to find the Binoculars icon. Select this option.
    - To find a specific account, you can choose which criteria you would like to search by.
        - For example, you can type in the first AND last name of the consumer, or JUST the first name, or JUST the last name. The more information you enter the more accurate search you will get.
    - To find a list of accounts, please leave all criteria in the search options completely blank. Navigate down to and select the blue *Search* box.
        - This will bring you to a full list of accounts that have been entered into our collections software.
        - Control What You See
            - ❖ Right click in the header section to select what information you would like visible. Be sure to select apply when you have finished selecting.
            - ❖ Categorize the way you like, by selecting the header and left clicking until its in the order you'd like.
                - Alphabetize names
                - Organize assignment dates by oldest to newest, vice versa
                - Categorize status codes.

Please feel free to reach out to our Client Services team at clientservices@ffrcollects.com or at 508.206.8810.

Collections With Compassion

How to Enter an Account Manually:
How to Enter an Account Manually: Entering accounts manually will assure that an account is uploaded immediately. Once you press save, the account will be entered right onto our collection platform and our first letter, the validation letter, will be scheduled to be sent out to your patient within 24 hours. Below you will find step-by-step instructions on how to enter an account, manually, on Client Access.

- Once you are logged into Client Access, please navigate to the left-hand side of the screen.
- You will find a yellow star icon, *New Account*. Please select this icon.
- Here is where you will enter in all information regarding the account.
- Please review this page prior to entering information, to make sure you have all the criteria that is required for submission.
- The required information will have a red *, or will be highlighted in red.

    New Account Information
- Client ID will auto populate to the ID # you were assigned, when your client profile was created.
- Client Account # is the assigned number from your system (i.e. chart #/reference # etc.)
- Last Service Date please enter the last date of service you are looking to collect for. If you are collecting for multiple dates of service, please use the most recent date you are collecting for.
- Principal Assigned is the total amount you would like us to attempt to collect.
- Itemization Date will auto-populate as the Last Service Date.
- Balance as of Itemization Date- This is the amount the consumer was originally charged. Reference original invoice.
- Transactions After Itemization- This is where you will list any adjustments, payments or credits that have been received.
    - ➢ Example: If the Balance as of Itemization Date is $100. But you have received payment or there has been an adjustment made of $50:
        - o you will enter the date of payment/adjustment, the amount of payment/adjustment ($50).
        - o Operator dropdown: select the **Received** option.
        - o Bucket dropdown: select **Principal**
        - o Type dropdown: **Payment** or **Adjustment**.
        - o Select add, to add this Payment or Adjustment.

        At the bottom of the Itemization Section, you will find the Assigned Balance of $100.

- Once the <u>Assigned Balance</u> is equal to the <u>Principal Assigned</u>, please move on to the Primary Demographic section.
  - ➢ Provide a phone location. If unknown, select **Unknown**.
  - ➢ Please provide us with as much information as possible.
  - ➢ You must fill in all required fields to submit account.
  - ❖ If the patient is a minor, provide the Guarantor's information in the Primary Demographic section, and the patient's information in the patient section.

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How To Upload Multiple/Batch of Accounts This includes: Account Placement
Forms, Excel Spreadsheets, Zoll/DAT Files; Uploading a file of accounts will ensure the accounts are entered within 24 hours of uploading. Below you will find step by step instructions to make the process as easy as possible.

- An account placement spreadsheet will be provided to you. Please be sure to have the information listed on the spreadsheet on hand.
  *Please be sure to enter the required information (Headers in Red)
  *The more demographic information that is provided the faster the account will be entered and worked.
- Once the spreadsheet is complete, please navigate to our homepage, to login to Client Access.
- On the left-hand side of the screen, you will find a folder icon 'File Drop Box'. Please select this option.
- Here you will select the blue box with the white, upwards arrow inside. This is where you will search for the document to upload. Once the document/spreadsheet has been selected, the accounts will be uploaded, awaiting entry by our team.

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How to Post a Transaction/Direct Payment Posting a transaction on Client Access is the new and improved way to inform us of payments made directly to you! Below you will find step-by-step instructions.

- Once you are logged into Client Access, navigate to the far left of the page. Here you will find a binoculars icon, *Search.*
- Click on this icon to search for the patient you are posting the transaction for, by entering in their name, DOB, or their account number.
- When the list is present click on the patient's account.
- When you are on the patient's account you will see options on the left hand navigation bar.
- Under the *Accounts* option, you'll see *Transactions.* Please click the *Post Transaction* option*.*
- Here you will post the date of the transaction, the amount of the transaction.
- Once the transaction is posted, we will be notified and approve the transaction. The transaction will only be declined if there has been a conversation prior.

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