

# Accounts Receivable Management

Take control of your patient A/R.



1 Day: 9:00 a.m. – 5:00 p.m.

## Managing Ledger Transactions

- Understanding the Ledger design, symbols, and display
- Posting procedures in the Ledger
- Posting payments and adjustments
- Splitting payments by provider and by family member
- Editing and deleting payments
- Correcting posting errors in history
- Setting up payment defaults

## Tip for Streamlining Financial Processes

- Entering finance charges and late charges on individual accounts
- Entering taxes and discounts
- Entering and editing batch payments
- Searching for payments using the Search Payments utility
- Making financial notes in Guarantor Notes
- Creating financial patient alerts

## Informing patients of their balances

- Understanding and using billing statement options
- Verifying billing statements to send or print
- Generating individual statements from the Ledger
- Setting up billing statement defaults
- Setting up dunning messages
- Setting up custom billing statement notes

## Collecting Outstanding Balances

- Opening and using the Collections Manager
- Creating an individual collection letter
- Creating a collection email message
- Setting up payment agreements
- Setting up common collection lists
- Generating collection letters with the Letter Merge feature

## Monitoring your A/R

- Generating and understanding the Aging Report
- Generating and understanding the Credit Balance Report
- Generating and understanding the Patient Balance Report
- Generating and understanding the Provider A/R Totals Report
- Generating and understanding the Practice Advisor Report - Production and Collections

## Performing Monthly A/R Routines

- Understanding the importance of performing Month End tasks
- Setting up Reports & Task Scheduler for month end processes
- Applying finance charges and late charges
- Scheduling daily and weekly tasks with Reports & Task Scheduler