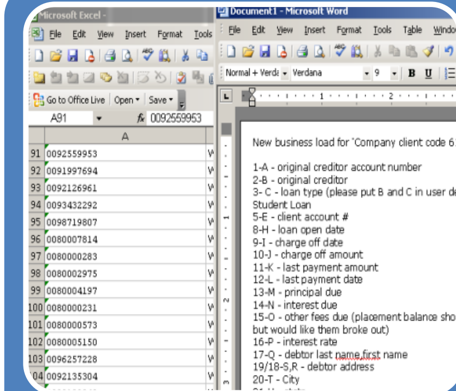
RMEx Management Training: Loading New Business

Agenda

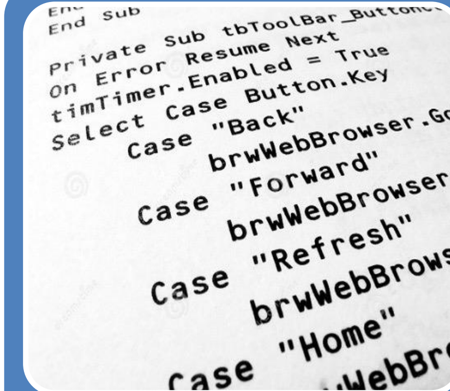
- Loading New Business – An Overview
- Understanding Standard Account Information
- Storing Non-Standard Account Information
- Setting Up Your Clients
- Contacting Your Consumers (IDL and Automated Calls)
- Assigning Accounts to Collectors
- Setting Up Client Fees
- Creating Business Rules To Link Multiple Accounts For A Consumer
- Adding To Descriptive Information To Accounts When They Are Loaded
- Organizing The Accounts To Be Worked
- Using different methods of loading accounts

Loading New Business – An Overview

Manual Account Entry



I-Load



Custom Code

Understanding Standard Account Information

Consumer Account

Use screen options to access different information

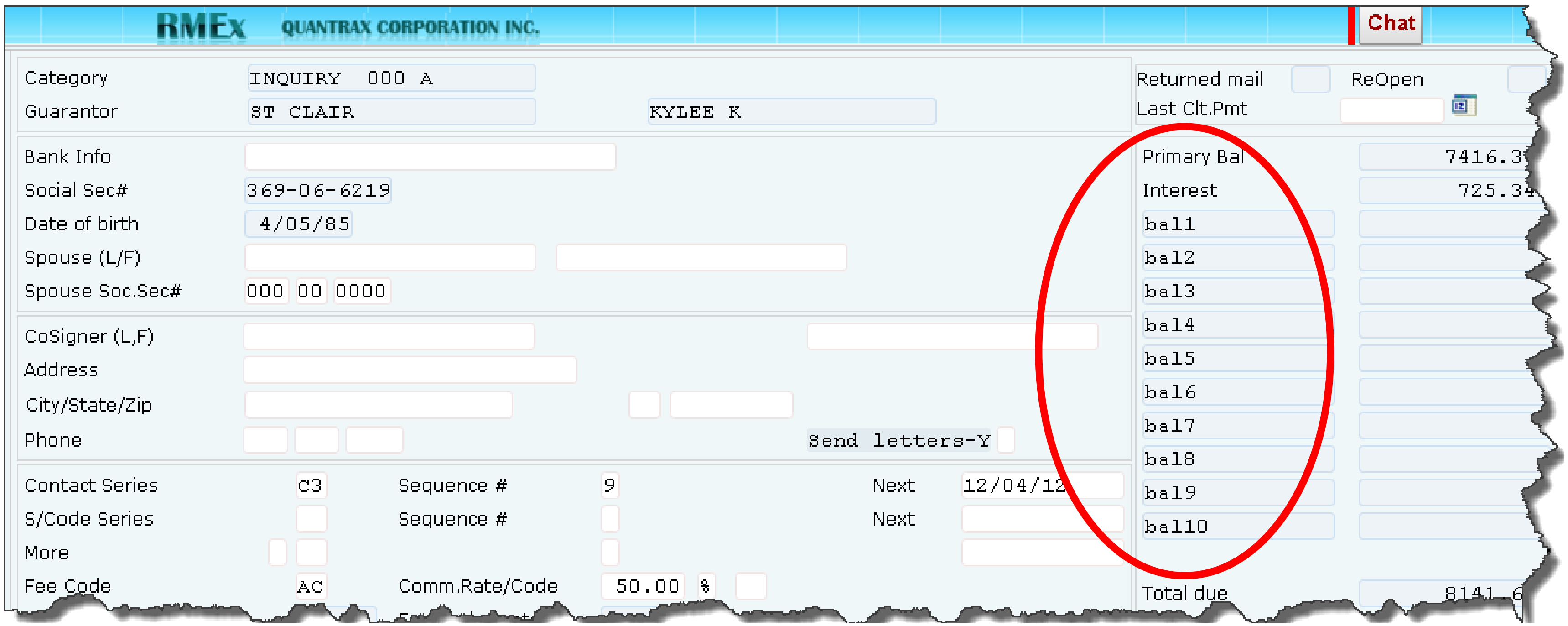
Balance Types	Phone Numbers	Additional Contacts	Cosigners	Medical data	Notes

RMEx Account Detail Screen

Standard Account Information – Balance Types

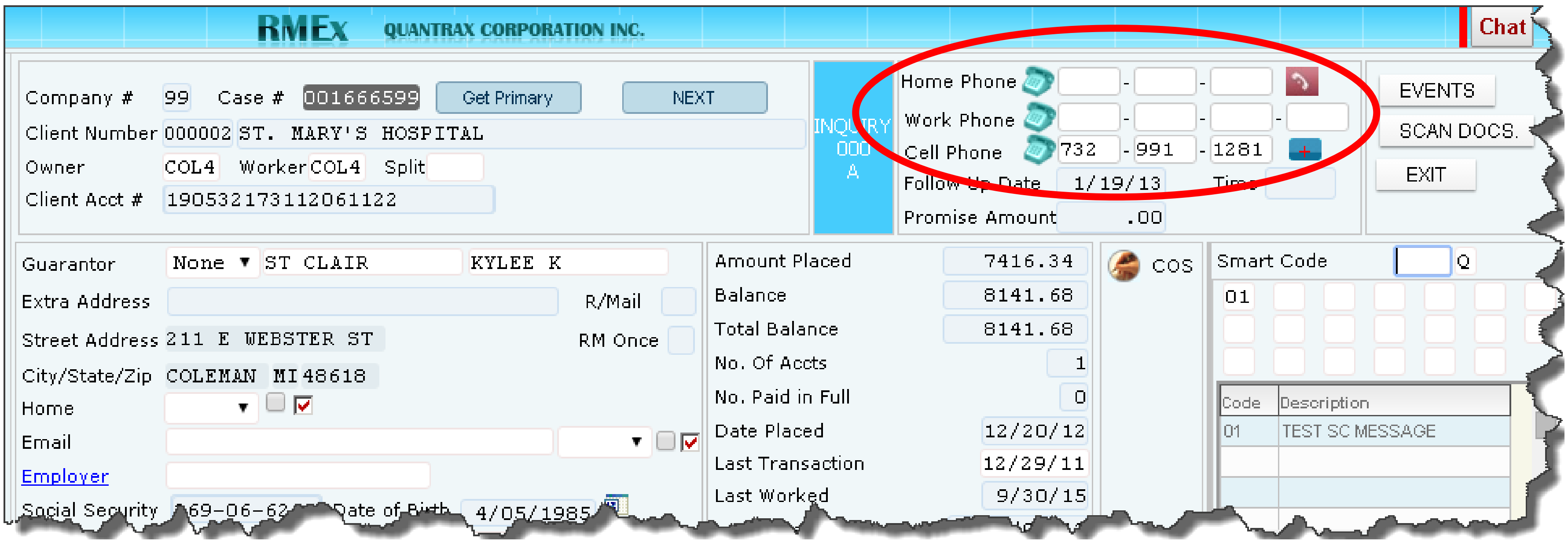
Inquiry Screen> Account Detail Screen > F10-Second Account Detail Screen Information

- Define up to 10 secondary balances
- Define the behavior for each secondary balance



Inquiry Screen> Account Detail Screen

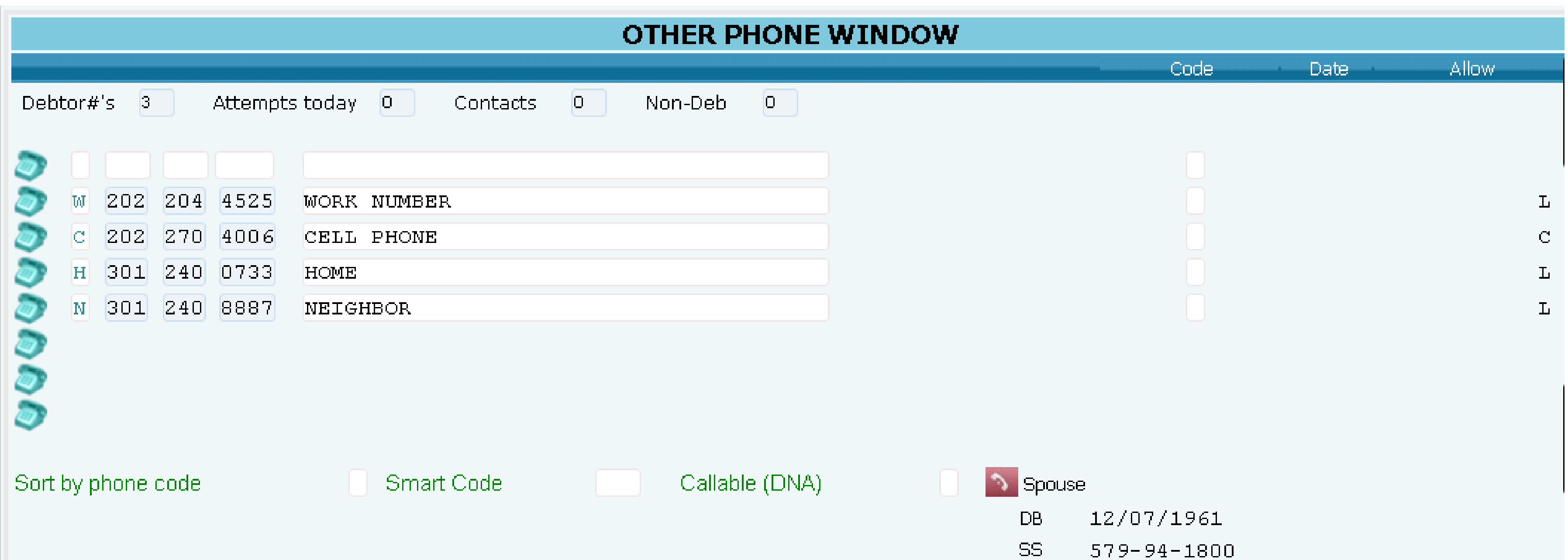
- "Best" numbers are on detail screen
- Permission is *assumed* for cell phone
- Unlimited number of phone numbers can be stored on "***Other phones***" screen



Standard Account Information – Other Phones Screen

Inquiry menu > Account inquiry> Account detail screen > Tab +

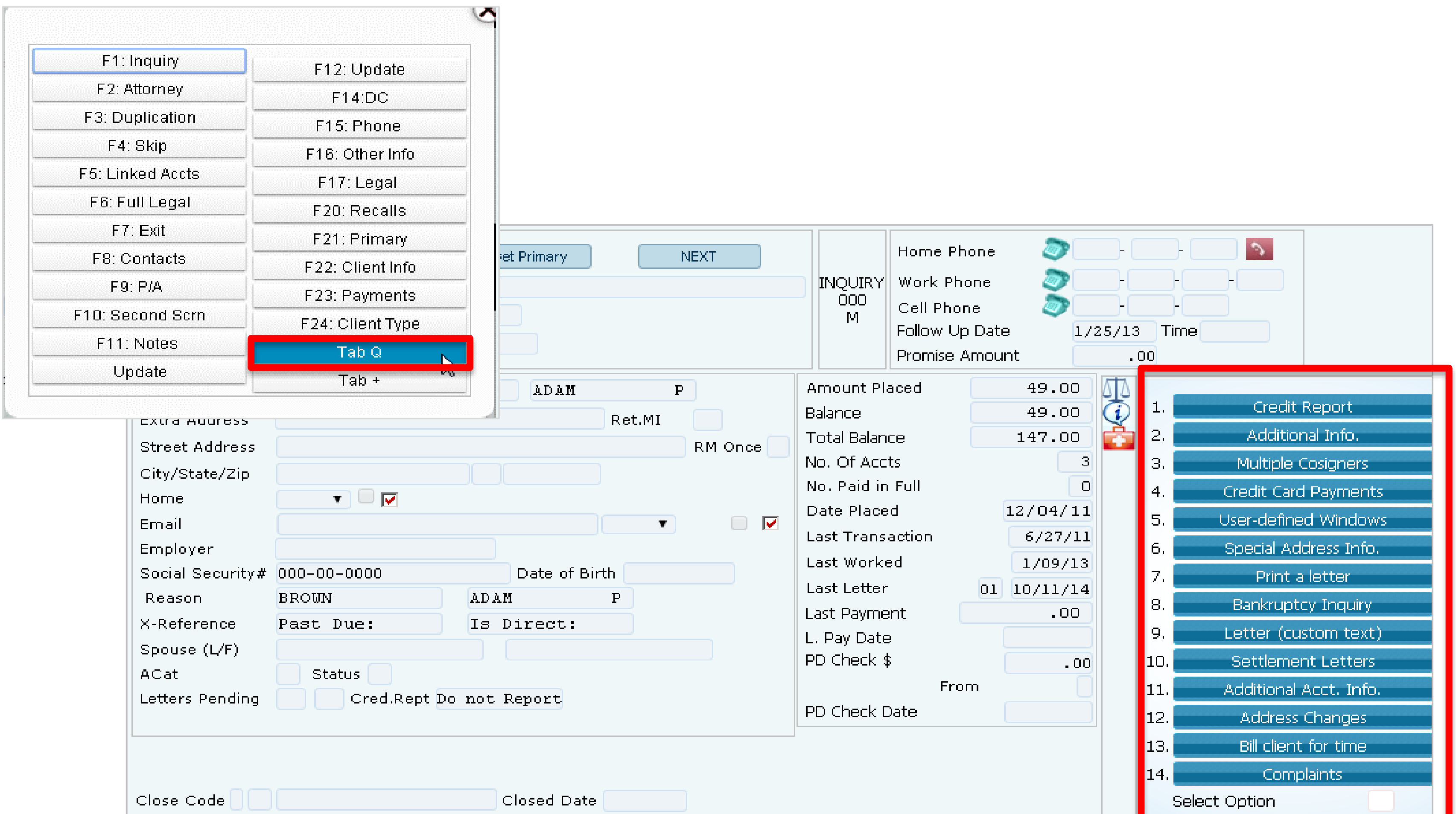
- Phone codes are needed
- Disabled numbers are easily identified
- Details and permission are stored at phone number level



Standard Account Information – Tab Q

Inquiry menu > Account inquiry> Account detail screen > Tab Q

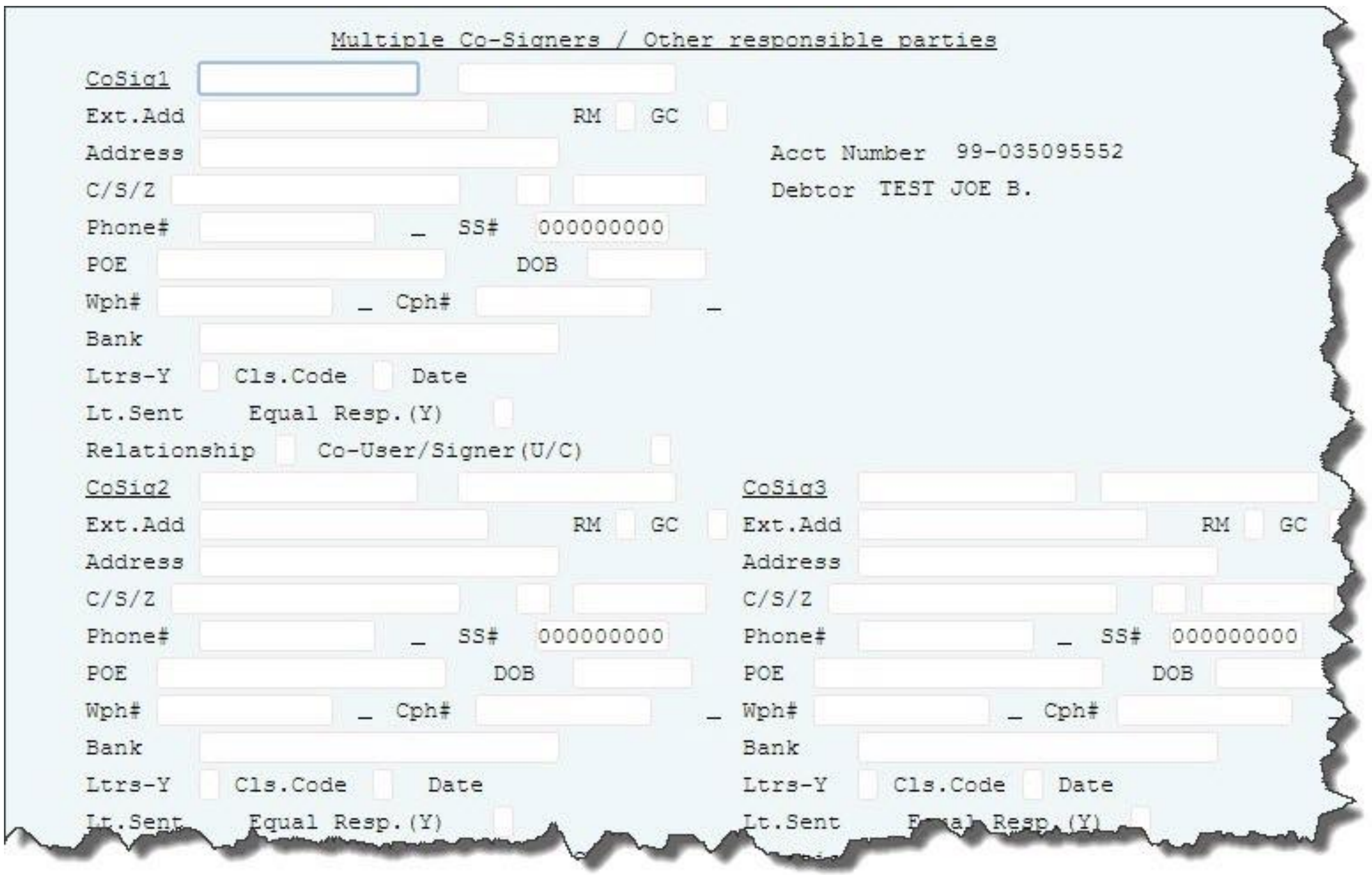
- ❑ Gives access to other Account Detail screen menu options



Standard Account Information – Cosigners

Inquiry menu > Account inquiry> Account detail screen > Tab Q > 3-Multiple Cosigners

- Up to 3 cosigners per account
- It is complex, but they can be separately dunned and worked



Multiple Co-Signers / Other responsible parties

CoSig1
Ext.Add RM GC
Address Acct Number 99-035095552
C/S/Z Debtor TEST JOE B.
Phone# _ SS# 000000000
POE DOB
Wph# _ Cph# _
Bank
Ltrs-Y Cls.Code Date
Lt.Sent Equal Resp.(Y)
Relationship Co-User/Signer(U/C)

CoSig2
Ext.Add RM GC
Address
C/S/Z
Phone# _ SS# 000000000
POE DOB
Wph# _ Cph# _
Bank
Ltrs-Y Cls.Code Date
Lt.Sent Equal Resp.(Y)

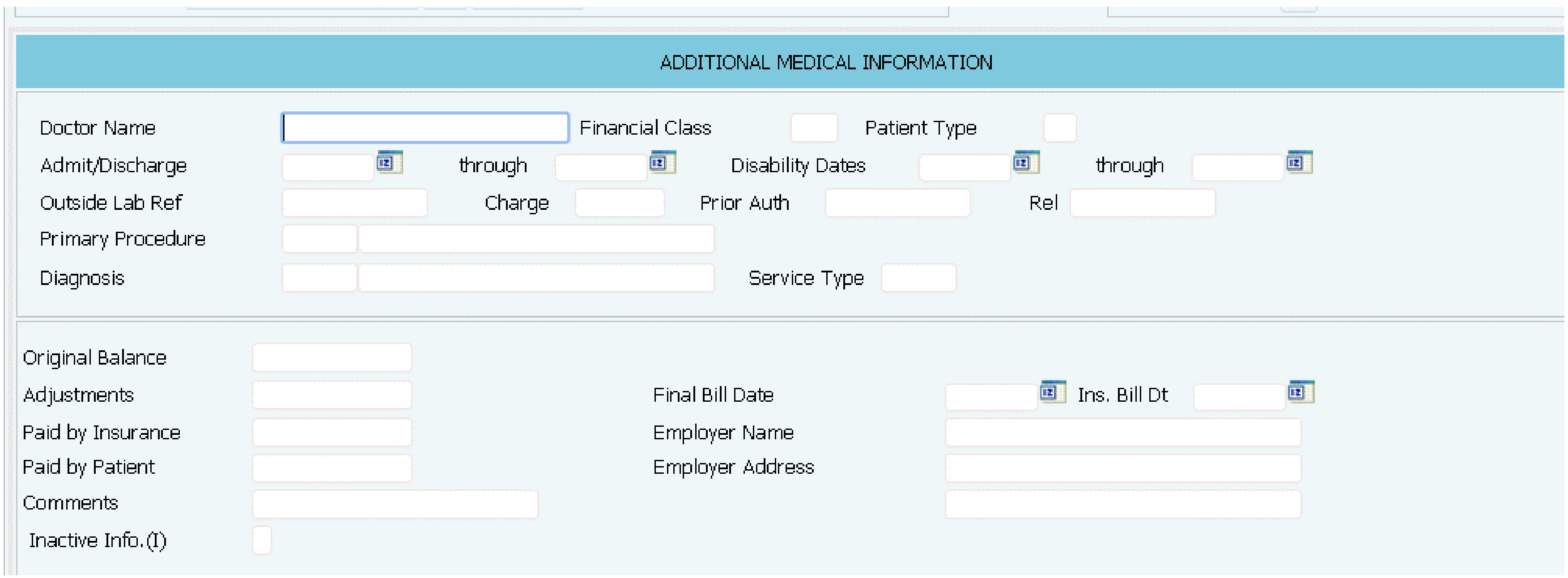
CoSig3
Ext.Add RM GC
Address
C/S/Z
Phone# _ SS# 000000000
POE DOB
Wph# _ Cph#
Bank
Ltrs-Y Cls.Code Date
Lt.Sent Equal Resp.(Y)

Standard Account Information – Medical Information

Inquiry menu > Account inquiry> Account detail screen > F16 – Other Info

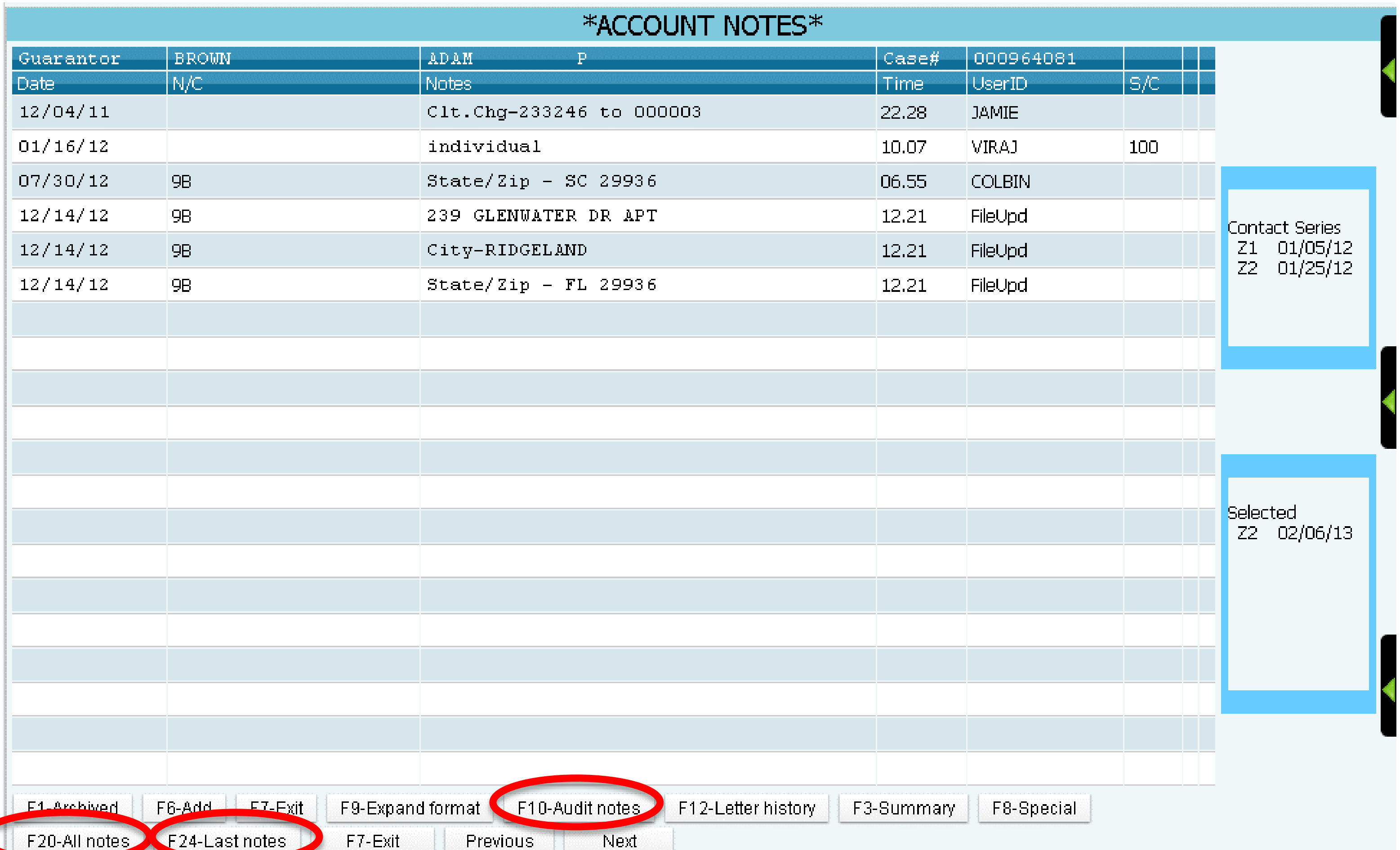
- Includes a Account Summary screen (**F5**)
- Up to 4 insurance companies
- Ability to bill a 1500 or UB04

NOTE: **F16**-Other Info will display information based on Client Type



Inquiry menu > Account inquiry> Account detail screen > F11- Notes

- ❑ Access to multiple Note screens
- ❑ Ability to use color options to highlight notes



ACCOUNT NOTES

Guarantor	BROWN	ADAM P	Case#	000964081	
Date	N/C	Notes	Time	UserID	S/C
12/04/11		Clt.Chg-233246 to 000003	22.28	JAMIE	
01/16/12		individual	10.07	VIRAJ	100
07/30/12	9B	State/Zip - SC 29936	06.55	COLBIN	
12/14/12	9B	239 GLENWATER DR APT	12.21	FileUpd	
12/14/12	9B	City-RIDGELAND	12.21	FileUpd	
12/14/12	9B	State/Zip - FL 29936	12.21	FileUpd	

Storing Non-Standard Account Information – User Defined Windows (UDW)

- ❑ Stores account or process specific info unique to the client type
- ❑ Creates up to 99 additional screens to store any additional data you may need

Load info into the windows electronically or entered by users

Setup free form windows or templates with some fixed text

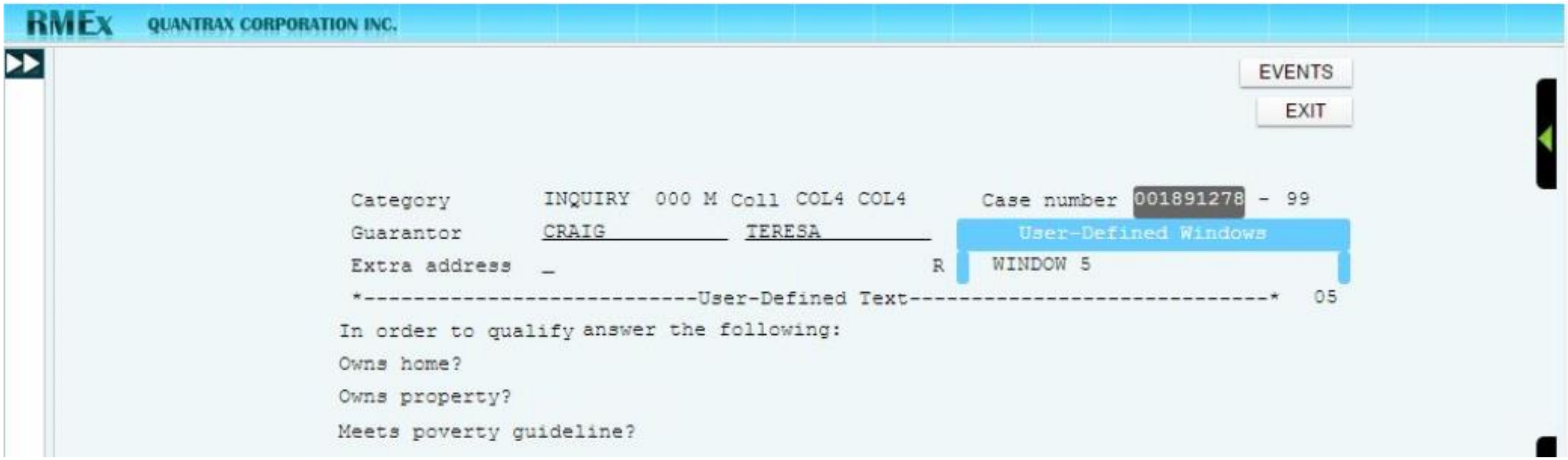
Create windows that can not be updated by users

Present a window based on the client on the account or the application of a Smart code

Print information from a window

Storing Non-Standard Account Information – User Defined Windows (UDW)

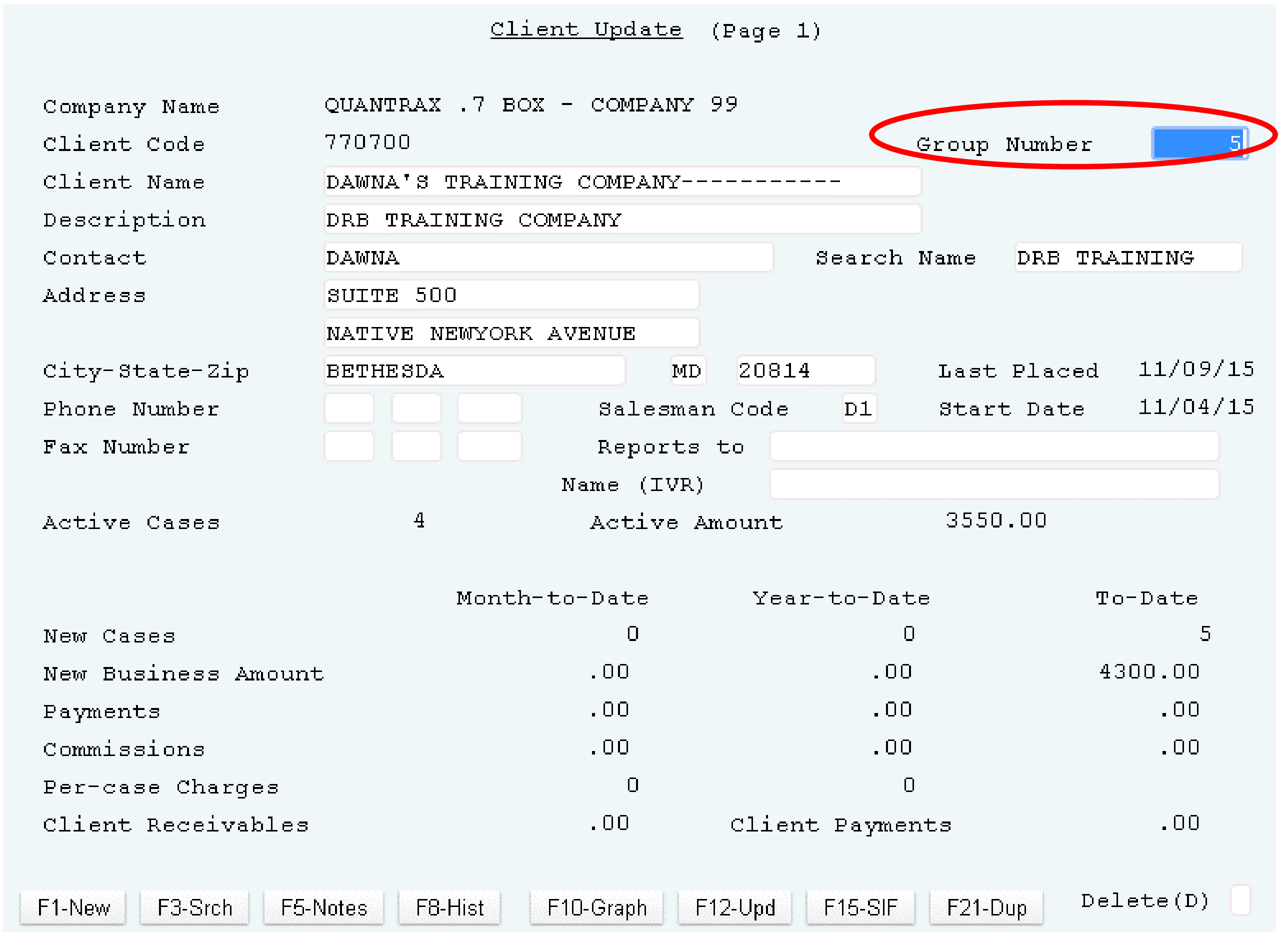
Inquiry menu > Account inquiry> Account detail screen > F5 - User-defined Windows



Quantrax CORPORATION RMEx Receivables Management Expert

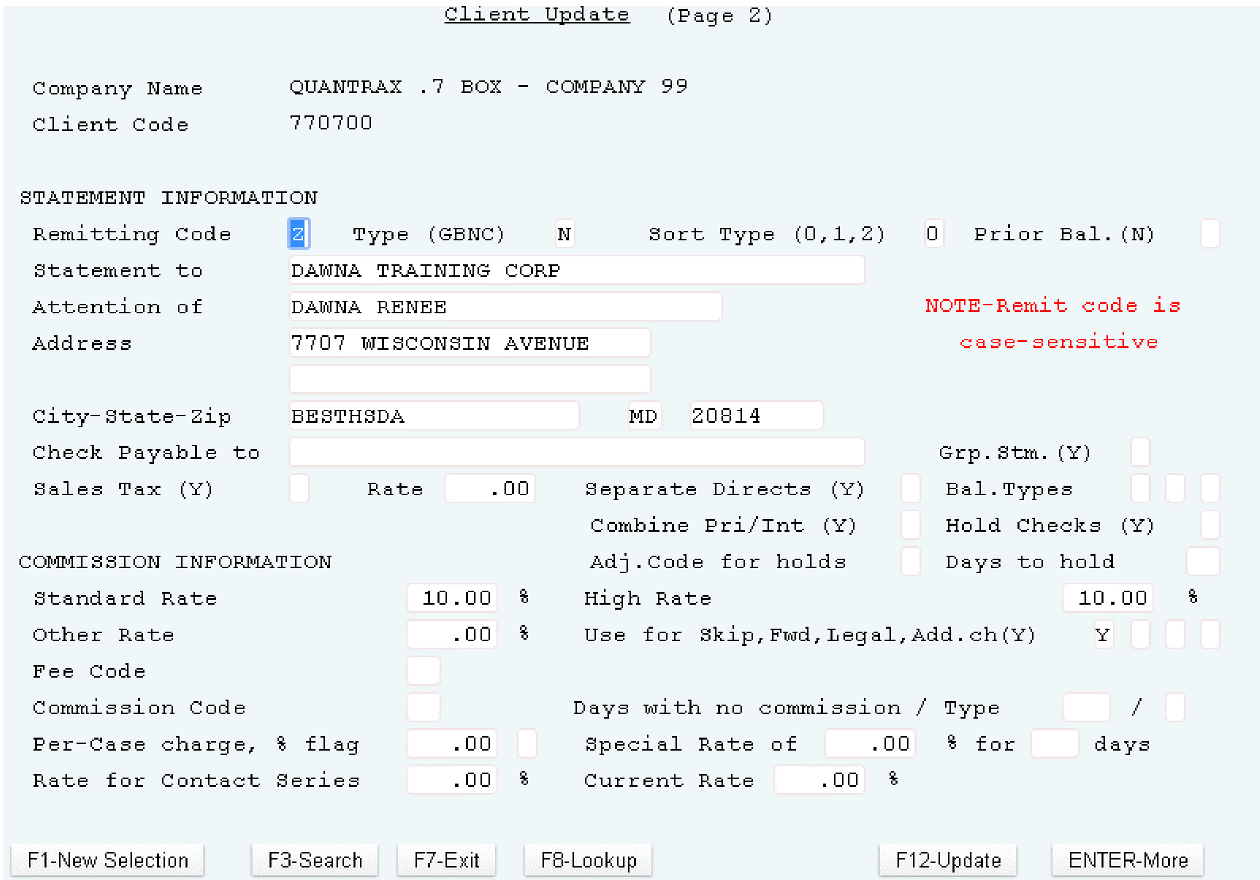
Management Menu > Client update (Page 1)

- “Group" individual client numbers together by entering a group number
- The group number MUST be the same as one of the existing client numbers within the group



Setting Up Your Clients

Management Menu > Client update (Page 2)



Client Update (Page 2)

Company Name QUANTRAX .7 BOX - COMPANY 99
Client Code 770700

STATEMENT INFORMATION
Remitting Code Z Type (GBNC) N Sort Type (0,1,2) 0 Prior Bal.(N)
Statement to DAWNA TRAINING CORP
Attention of DAWNA RENEE
Address 7707 WISCONSIN AVENUE
City-State-Zip BESTHSDA MD 20814
Check Payable to
Grp.Stm.(Y)
Sales Tax (Y) Rate .00 Separate Directs (Y) Bal.Types
Combine Pri/Int (Y) Hold Checks (Y)
Adj.Code for holds Days to hold

NOTE-Remit code is case-sensitive

COMMISSION INFORMATION
Standard Rate 10.00 % High Rate 10.00 %
Other Rate .00 % Use for Skip,Fwd,Legal,Add.ch(Y) Y
Fee Code
Commission Code Days with no commission / Type /
Per-Case charge, % flag .00 Special Rate of .00 % for days
Rate for Contact Series .00 % Current Rate .00 %

F1-New Selection F3-Search F7-Exit F8-Lookup F12-Update ENTER-More

Management Menu > Client update (Page 3)

Client Update (Page 3)

Company Name QUANTRAX .7 BOX - COMPANY 99
Client Code 770700

PLACEMENT INFORMATION
Last placement date was 11/09/15
Link Code (Blank=Stop) 01
Contact Series Client Code T
Contact Series
Repeat dialer attempts every days
Stop matching on entry (Y)
Add .00 % of Pri.to Bal.Typ P,I,1-9,0
Add .00 to Balance type
.00

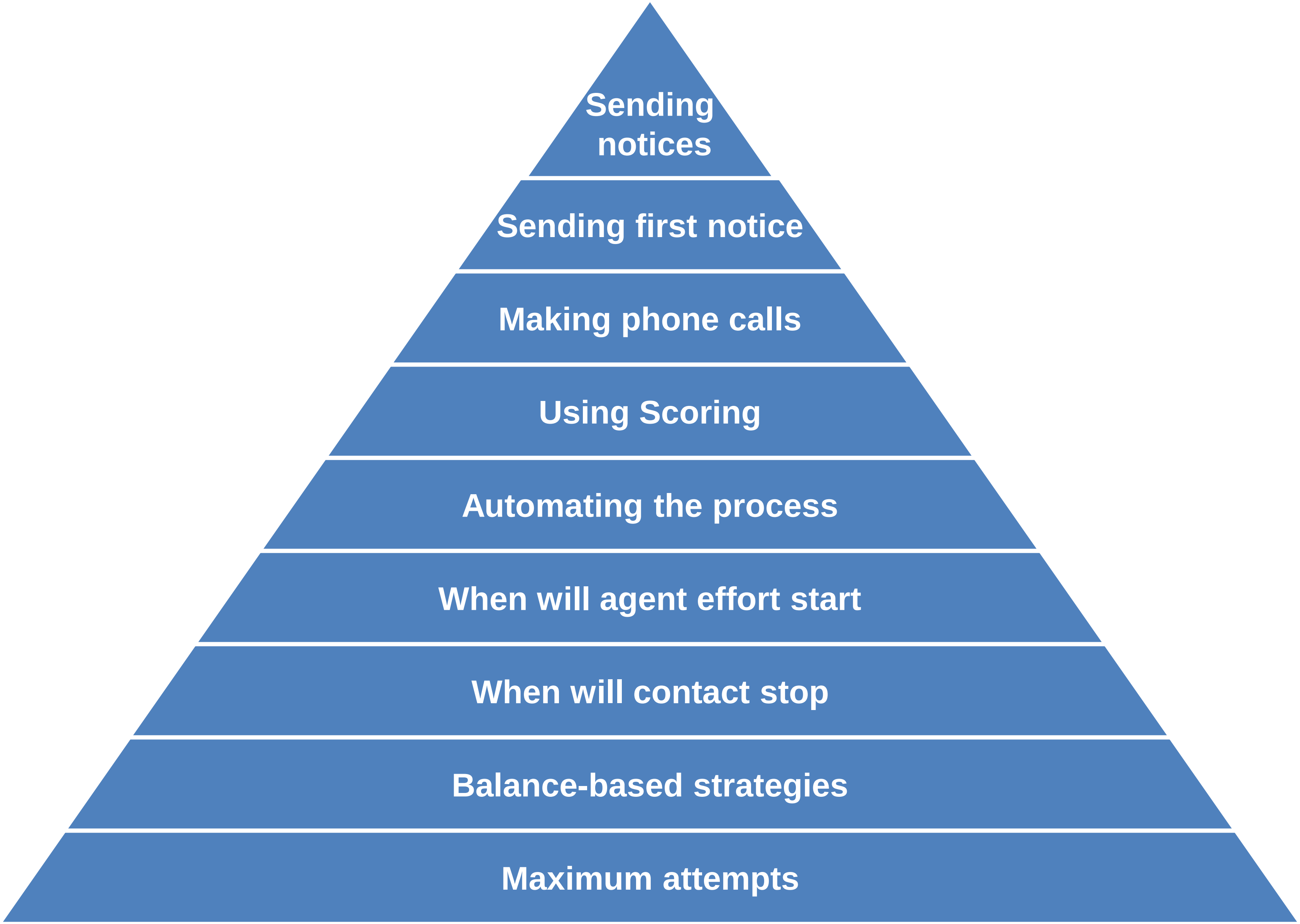
COLLECTOR ASSIGNMENT (Y) Code
Alphabetic
Proportional Y 02
Special Logic (Y) for Prop.

STANDARD REPORTS (Y) Frequency (M,Q) Type
Status Report Y Q
Close-out Report
Activity History Y M
Regression Report Y M
Acknowledgement (D,M)
Placement History Y M

Reporting Area DOODAH
Reporting Division
Consolidation Code
(must be a Client Code)
Pre-Collect type
E-mailing options (Y)
Send to Web Server?(Y)

F1-New Selection F3-Search F7-Exit F8-Lookup F10-Reporting F12-Update ENTER-More

Contacting Your Consumers – Contact Series



Contacting Your Consumers - Contact Series

System Control 1 > Contact series definition

- Create a series of letters or phone calls

Contact Series Definition

Company name QUANTRAX .7 BOX - COMPANY 99

Contact series AR Description FIRST LETTER

		-- A U T O D I A L L E R --			Max Att		- LETTERS -	
Seq#	Days after prior seq#	Open script	Close script	Message	All	Seq#	Let code	Send with phones-Y
1.	1 *						Z1	Y
2.								
3.								
4.								
5.								
6.								
7.								
8.								

Days to wait after final sequence number Credit reporting delay

Close account after completion (Y,A) Close code Secondary

Maximum link balance for close .00 Pre-collect (Y) to seq#

System Control 1 > Contact series by client

- Tie a contact series to a client

Contact Series by Client

Company name QUANTRAX .7 BOX - COMPANY 99

Client code A

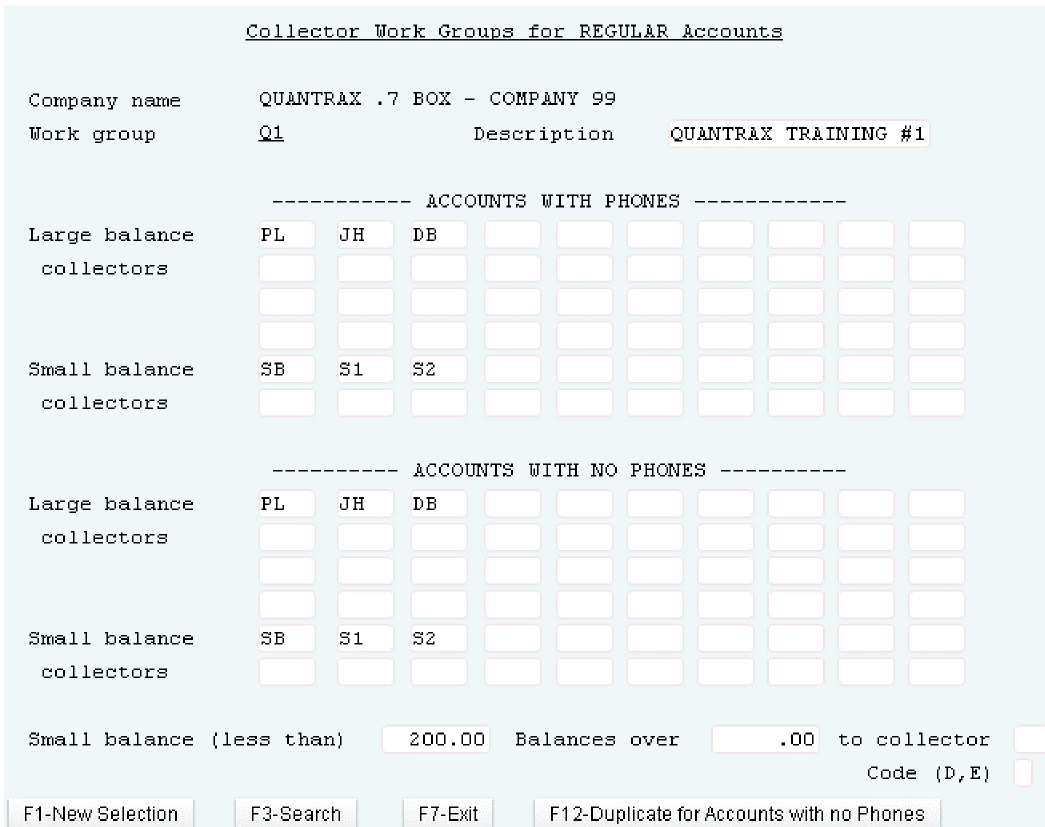
Description ST.MARYS HOSPITAL

Balances up to	Use contact series	If no phone exists (optional)
100.00	AO	B!
500.00	A3	AR
9999999.99	C2	C3

Assigning Accounts to Collectors

System Control 1 > Collector work groups

- Linked to a client
- Set up for small and large balance collectors
- Assign based on existence of a phone number
- Set up a single virtual agent for a pool



Collector Work Groups for REGULAR Accounts

Company name QUANTRAX .7 BOX - COMPANY 99
Work group Q1 Description QUANTRAX TRAINING #1

----------- ACCOUNTS WITH PHONES ------------

Large balance collectors	PL	JH	DB
Small balance collectors	SB	S1	S2

---------- ACCOUNTS WITH NO PHONES ----------

Large balance collectors	PL	JH	DB
Small balance collectors	SB	S1	S2

Small balance (less than) 200.00 Balances over .00 to collector
Code (D,E)

F1-New Selection F3-Search F7-Exit F12-Duplicate for Accounts with no Phones

Setting Up Client Fees and Remit Rules (Standard Rates or Fee Schedules)

Management menu Client update > (Page 2)

- Simple commission (high and low rate) or fee codes
- Rate is kept at account level and can be changed by the system
- Separate statements by balance type or type of payment

Client Update (Page 2)

Company Name QUANTRAX .7 BOX - COMPANY 99
Client Code 000100

STATEMENT INFORMATION
Remitting Code M Type (GBNC) G Sort Type (0,1,2) 0 Prior Bal.(N)
Statement to
Attention of NOTE-Remit code is
Address 1234 GHGHGT case-sensitive

City-State-Zip BETHESDA AK 22121
Check Payable to Grp.Stm.(Y)
Sales Tax (Y) Rate .00 Separate Directs (Y) Bal.Types
Combine Pri/Int (Y) Hold Checks (Y)
COMMISSION INFORMATION Adj.Code for holds Days to hold
Standard Rate 12.34 % High Rate 12.34 %
Other Rate .00 % Use for Skip,Fwd,Legal,Add.ch(Y)
Fee Code
Commission Code Days with no commission / Type /
Per-Case charge, % flag .00 Special Rate of .00 % for days
Rate for Contact Series .00 % Current Rate .00 %

F1-New Selection F3-Search F7-Exit F8-Lookup F12-Update ENTER-More

Creating Business Rules To Link Multiple Accounts For A Single Consumer

System Control 1 > Account linking parameters

- Limit linking based on client, client type and other rules
- Uses a point system to determine if accounts should link
- Links during nightly process to existing accounts using the “points structure” set up in the account linking parameters
- Apply smart codes to the new account based on successful linking as well as if no linking occurs

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                         Account Linking Parameters

Company name        Quantrax RMEx                          (01)
Link code           03          Description        OUTSOURCED ACCOUNTS

Minimum points to link account                  30
Minimum points to print (no linking)            20

                          POINTS FOR MATCHING
Guarantor social security number    50     Guarantor name (LAST + FIRST)    15
Street address                      15     Zip code
Client account number                      Home phone number
Guarantor date of birth             50     Work phone number
Spouse first name                          Routing # and bank account #

ON SUCCESSFUL LINK:   Change collector if old account is REGULAR (Y)
                      Change collector if old account is LEGAL   (Y,N)    N
                      Apply Smart Code          Do not change Worker (Y)

ON UNSUCCESSFUL LINK: Apply Smart Code          Char. for Cl.Acct# (1-9,0)

Linking options (Y,T,C,1,2,3)                             Delete 'D'
```

Adding To Descriptive Information To Accounts When They Are Loaded

System Control 1 > Description codes

- Create User-defined description codes
- Used in decision-making and agent interfaces

Description Codes

Company name QUANTRAX .7 BOX - COMPANY 99
Code AB

Description DISPUTE RESOLVED

Description for status report
Description for close report
Language translation (Y)
Can not be added by user (Y)
Can not be removed by user (Y)
Do not duplicate on links (N) Payments allowed (N=No)
Do NOT remove if new code is to be added to account and all codes are used (Y) Include balance for collectors (N=No) N

Special warning message -----> (User will need special authority for access) Allow access if special authority is at least
Expand Event(ANb)
Smart codes to advance

Organizing The Accounts To Be Worked

System Control 2 > QCat codes

- Simple and powerful Queue Category (QCat) code
- Manage accounts within your queues

```
                         QCat Codes

Company name        QUANTRAX .7 BOX - COMPANY 99
Code                000
                                              SORT/SECONDARY SORT CODES
Description         STANDARD                   C - Client code (ascending)
                                               B - Descending balance
Sort category                                  P - Primary insurance
Secondary sort                                 S - Secondary insurance
                                               Z - Skip tracing (zip,street)
Breakpoint (days)                              F - Forwarded agent code
                                               A - Age from placement (oldest
Best time to work                                  accounts first)
                                               D - Date last worked (longest
Omit from dialer (Y)                                not worked presented first)
                                               R - Court code
Delete 'D'                                     N - Guarantor name
                                               O - Owner code (Collector)
                                               I - Internal score (lowest first)
                                               T - Last transaction date
                                               E - External score (descending)
                                               W - Age from placement (new first)
```

Automating Processes When Accounts Are Being Posted

System Control 1 > Smart codes

- **Thinking before you even start work!**
  - Apply smart codes
  - Add description codes
  - Schedule future action (Smart Code Series)

Smart Codes

Company code 99

Company name QUANTRAX .7 BOX - COMPANY 99

Smart Code

Client override (Override code with search shows Smart Codes with that

(or other) override. Override "BASE" shows standard S/Codes only.)

Page# for existing code

If a new code is to be created based on an existing code, enter the following

Existing Smart Code First unused code in each range

Client override 264 301 404 512 604 701 804 916

Company code

(if different)

If decisions and actions are to be copied from one Smart Code to another -

Copy from Smart Code Copy to Smart Code

Client override Client override

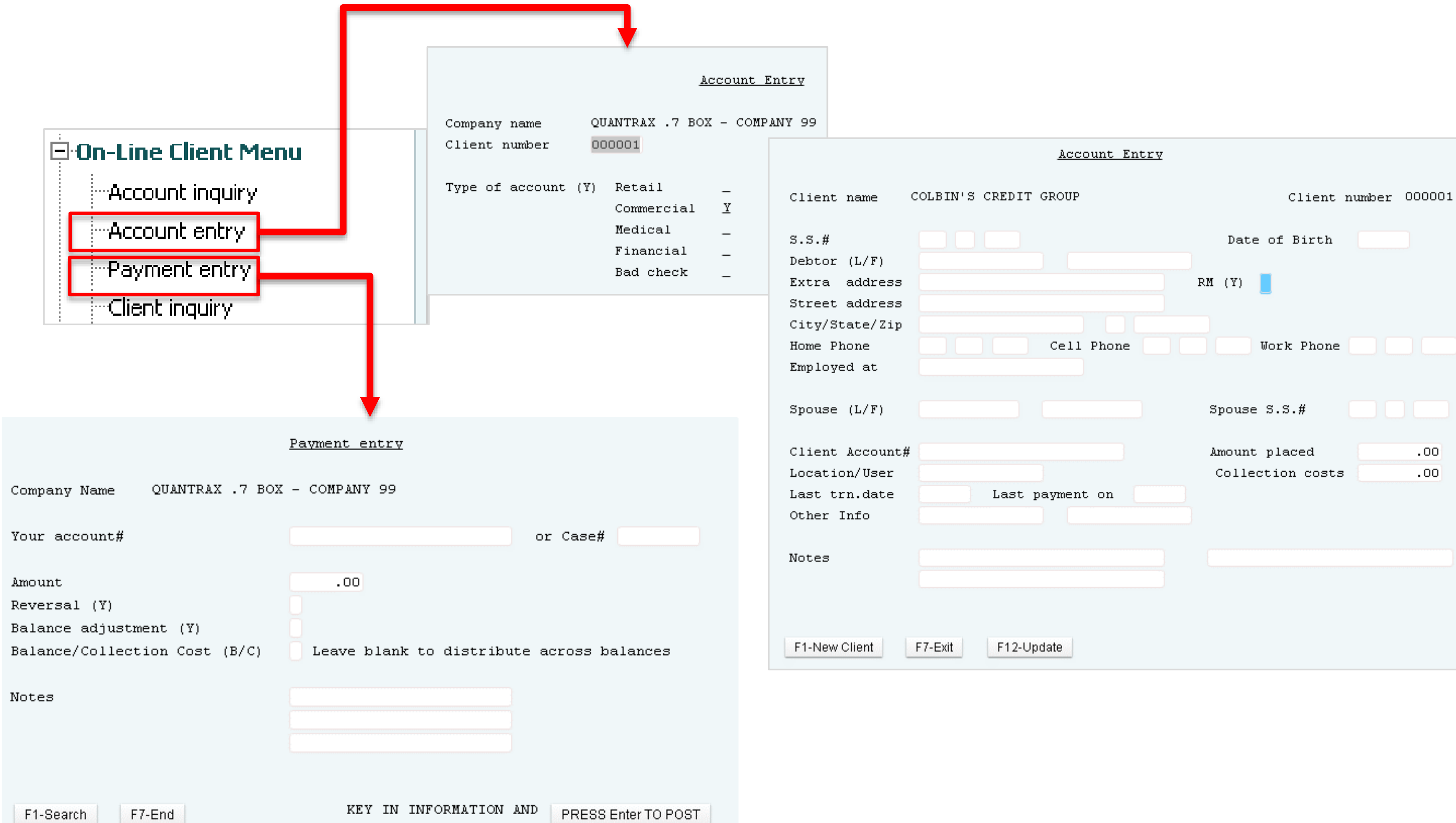
For search, show used on or after or NOT used on or after

(Page back not supported on search when date range is selected)

F3-Search F5-Where used? F6-SC/Seq Message F8-Hist F19-Exit/print all codes

On-Line Client Menu

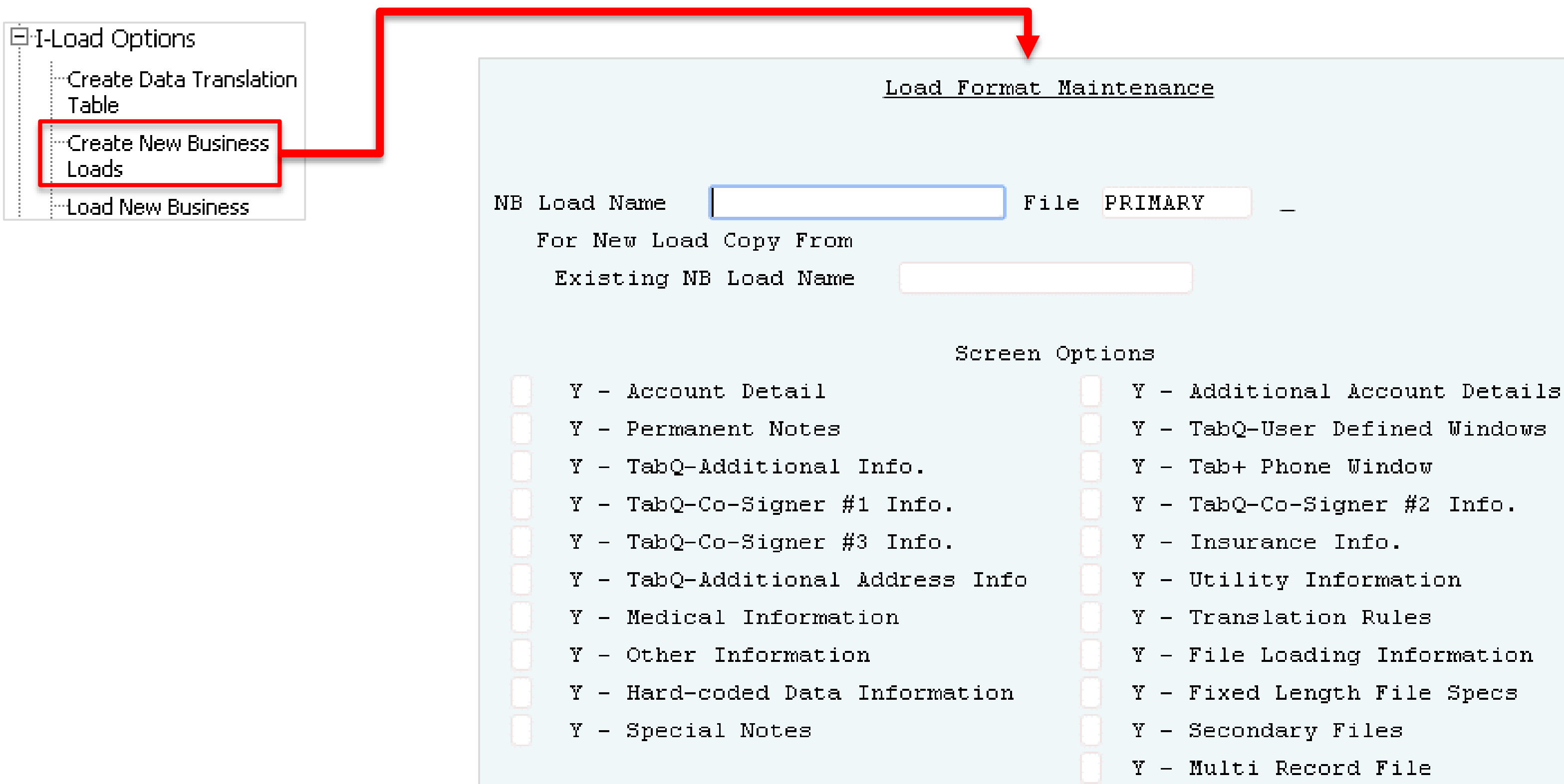
- ❑ Enter, edit and post accounts
- ❑ Allow clients to enter accounts directly into the system



Loading New Business Through I-Load

Special options menu > I-Load Options

- Use "I-Load", an optional ETL (extract, transform, load) module
- Allows the user to create, manage and execute new business loads
- Train non-technical people to load client data into the system
- Load information directly to the User Defined Windows, **F16**-Insurance screen, **Tab +** window (Other phones) etc.



Loading New Business With Custom Code

- Clients need to send their details to ***project@quantrax.com*** in the form of a flat file or a delimited file
- Quantrax will write new business loads according to the specification (after clarifying any doubts with the client) and will transmit the code to the client's modification library
- Clients that have electronic loads, should convert them for the new system and test prior to the date of final conversion

Exercises – Loading New Business

In your system, use COMPANY 99

1. Enter an account using your test client code that includes the following information:
   - First and last name
   - Address
   - Social security number
   - Date of birth
   - Home and work phone number
   - Client account number
   - Amount placed is $500.00
   - Last transaction date
   - Description code of CH

2. Review the account and see what contact series is setup on the account; does it match what is setup on the client master?

3. What are the owner and worker assigned to the account?

4. Does it match what is setup in the work group?

5. Did the CH description code get added to the account?

RMEx Management Training: Loading New Business

Thank you!