RMEx Management Training: Generating Mail And Related Documents
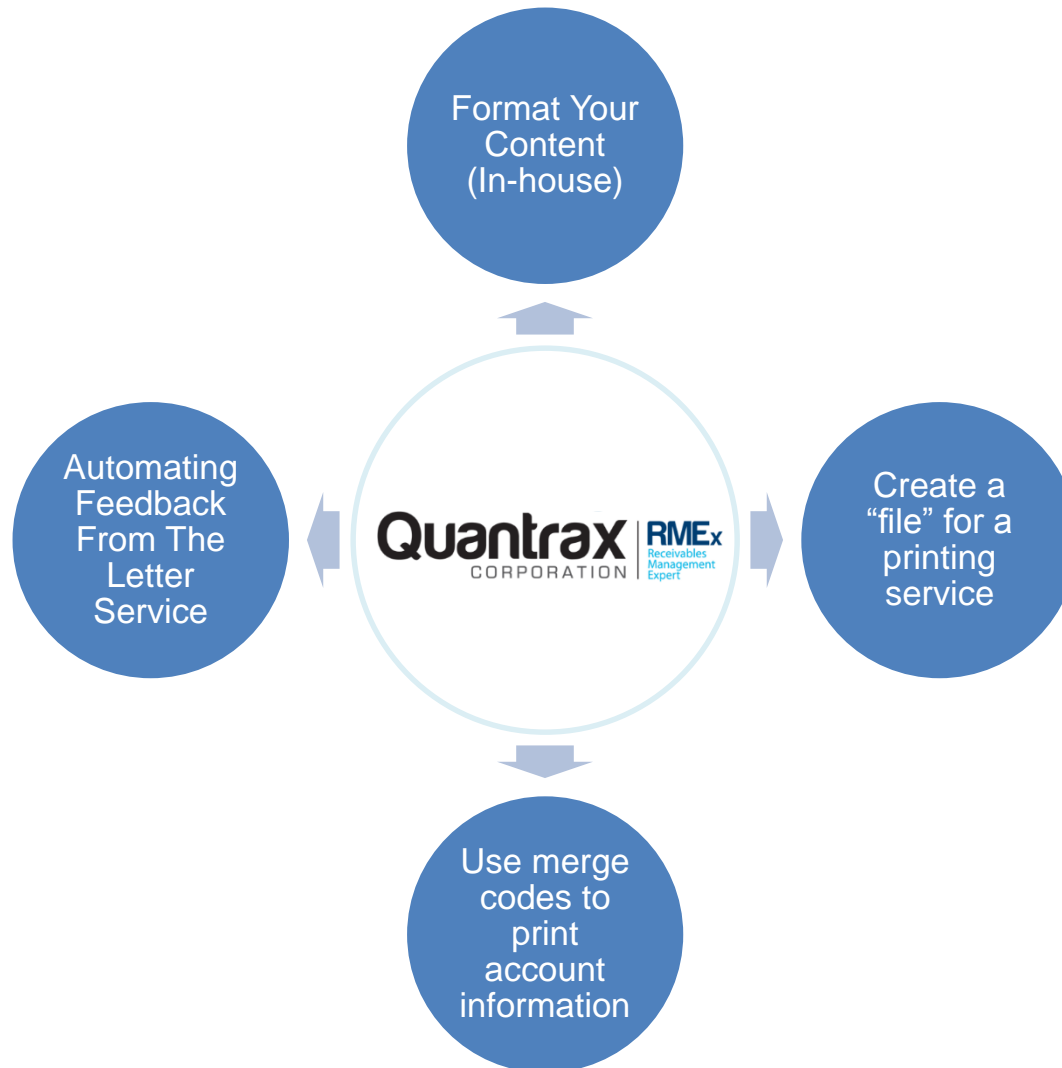

WELCOME TO CLASS

Agenda

- ❑ Understanding Your Mailing Options
- ❑ Automating Feedback From The Letter Service
- ❑ Creating a Letter in RMEx
    - ❑ Configuring types of forms/paper for letter
    - ❑ Defining the letter
- ❑ The 3 Ways to Send A Letter in RMEx
- ❑ Sending/Stopping Letter Based On Circumstances
- ❑ Sending Letters For Post-Dated Checks
- ❑ Sending Reminder Letters For Payment Arrangements
- ❑ Handling And Tracking Returned Mail
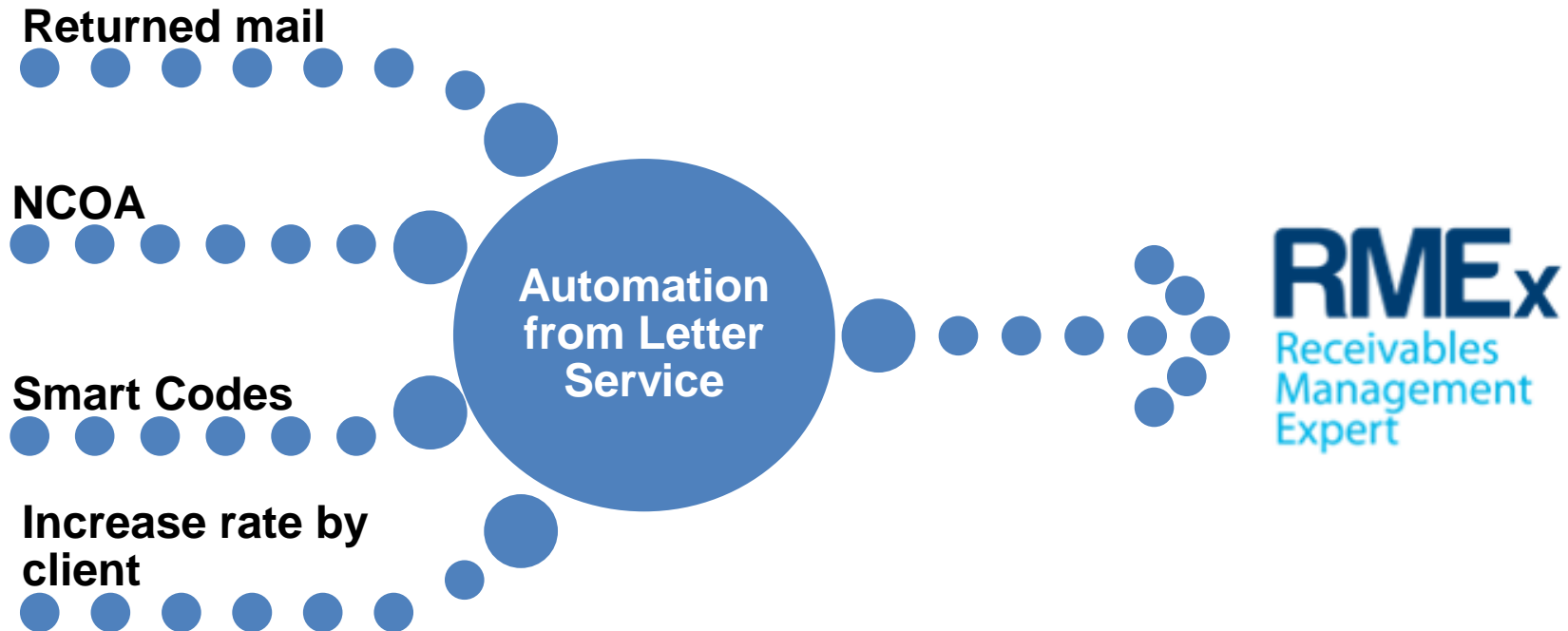- ❑ Understanding the Nightly Process Related To Letters

Understanding Your Mailing Options

In House

Third Party Service

Small volume of letters

Resources Needed

Large volume of letters

Less Resources Needed

Customized mailing options

Understanding Your Mailing Options

Returned mail

NCOA

Automation from Letter Service

Smart Codes

Increase rate by client

RMEx
Receivables
Management
Expert

System Control 2 > Form Type

❑ A form type must be setup to print letters

❑ Different form types can be used - one for consumer letters and one for client letters

<u>Form Types</u>

```
Company name        QUANTRAX .7 BOX - COMPANY 99
Form type           STRD


Description         STANDARD


Delete 'D'
```

Creating A Letter In RMEx

- ❑ Sending letters via email or paper
- ❑ Concept of "standard letter" or "company" (special) letter
- ❑ On-demand (selected)
- ❑ Automated (contact series)
    - ❑ The contact series – a series of letters and / or phone calls
    - ❑ IDL (Initial demand letter) – system can send it after first "contact"
- ❑ Define the letter in letter codes
- ❑ Set up the letter in letter format options

Your RMEx solution. . . . .

Creating A Letter In RMEx – Defining The Letter

System Control 1 > Letter Codes – Page 1

❑ Add rules for each letter type

❑ Setup Letter code *prior* to setting up merge code or text in letter format

Letter Codes

```
Company name        QUANTRAX .7 BOX - COMPANY 99
Letter code       AD    Description   FIRST NOTICE              Email (Y)
                                                         Email code

Allow in contact series (Y,A)    Y      Allow as selected letter (Y,A)    Y
First letter (Y,L)                 ---> Add D/C        Add D/C for RM
Allow selected letter on account with a close code (Y)
Do not allow selection WITHIN      days of placement date
Do not allow selection AFTER       days of placement date


Allow only ONCE per account-Y,S        Allow on legal account only (Y)


Page length (Max.of 112 lines)   100    Number of pages              3
Number of copies                  1    Form type code             STD
Print link balances (Y,1-9)       Y    Print post-dated check info.(Y)
Print additional info.(F16) (Y)   Y    Print pay.arrangement info.(Y,P)
Print legal info. (Y,L)                Print medical info. (Y)
Print legal tracking info (Y,P)        Send additional letters
Special printing selection (YZS)  Z    Print in upper case (Y)
Add description code                   Send with bad address (Y)
Letters sent   MTD:        YTD:                      Delete 'D'
```

F1-New Selection   F3-Search   F7-Exit   ENTER-More Information

Creating A Letter In RMEx – Defining The Letter *(continued)*

System Control 1 > Letter Codes – Page 2

Letter Codes

Company name   QUANTRAX .7 BOX - COMPANY 99
Letter code   AD   Description   FIRST NOTICE

Send with attorney (Y)   Send with zero balance (Y)
Requires insurance 1 (Y)   Sort by insurance 1 zip (Y)
Requires insurance 2 (Y)   Sort by insurance 2 zip (Y)
Requires POE from F17 (Y)   Requires pay.arrangement (Y)
Requires promise date (Y)   Bypass address checking (Y)

Omit from file to letter service (Y)   Language code (F/S)
P/A letter with multiple installments (Y)
Do not allow if any letter mailed within   days   Only for S/C window (Y)
Bypass "mailed within check" with D/C   Bypass state letter
Letter to? (C=Client, P/S=Pri/Sec.Insurance)   translation (Y)
Cosigner options (1,2,3,G)
Sort by owner/worker (O,W)   * Bypass option for
Sort by link number (Y)   linked balance based
Apply Smart Code   on placed date (Y)
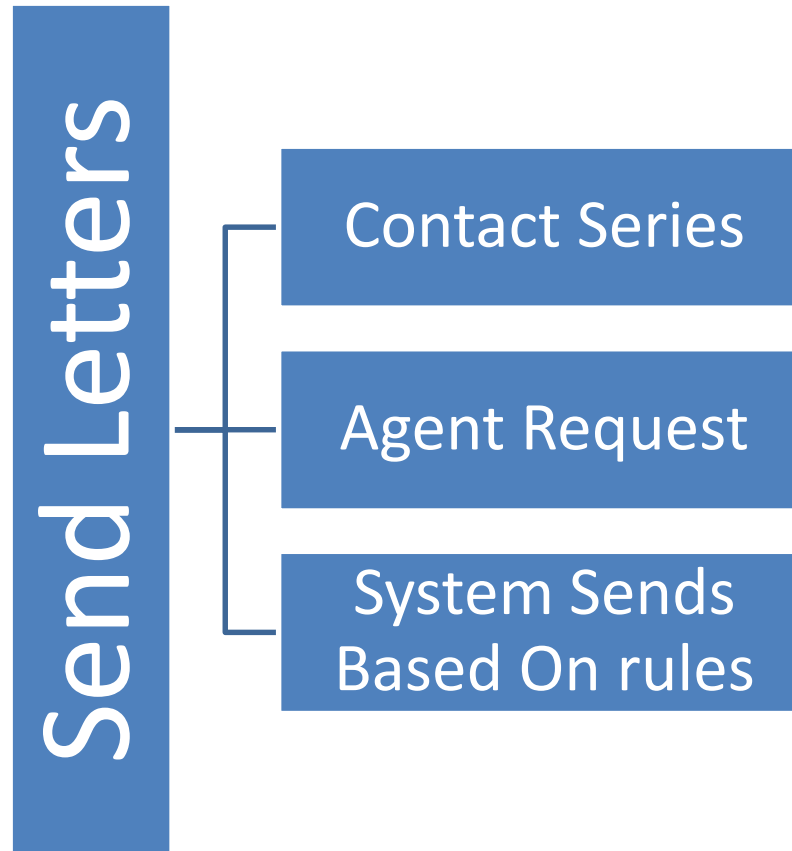Apply Smart Code if letter fail
Strength of Letter (W,N,S,V,b)   * Review help text

F1-New Selection   F3-Search   F7-Exit   F11-Print sample format

The 3 Ways to Send A Letter in RMEx

Send Letters

- Contact Series
- Agent Request
- System Sends Based On rules

Your RMEx solution. . . . .

Automatically Send A Letter To Be Sent

System Control 1 > Letter Codes – F7

❑ Request for the system to send a letter if one has *not* been sent
❑ Select the criteria and request the appropriate letter

```
                    Letter request options


Company name        QUANTRAX .7 BOX - COMPANY 99


Do on an attempt (Y)          [ ]
Do on a contact (Y)           Y               Letter codes with Y
Do on any other action (Y)    [ ]             or L in "First Letter"
Letters to check              01  [ ] [ ] [ ] [ ]   are always checked.


If none sent-------->  Send  [ ]      Apply Smart Code  [ ]   Override  [ ]


No letter or Smart Code for duplicated cases (N)    [ ]


                  This option will be checked when
               any smart code is applied, provided
                  the smart code gets processed.
              FORWARDED ACCOUNTS ARE NOT CONSIDERED
```

ENTER-Update Information   F7-Exit

Sending / Stopping Letter Based On Circumstances

Select by….

☐ State

☐ Client Group Number

☐ Collector Code

☐ Description Code

☐ Location Code

Circumstances

☐ Letter in different language

☐ Different text based on client needs

☐ State compliance requirements

Your RMEx solution. . . . .

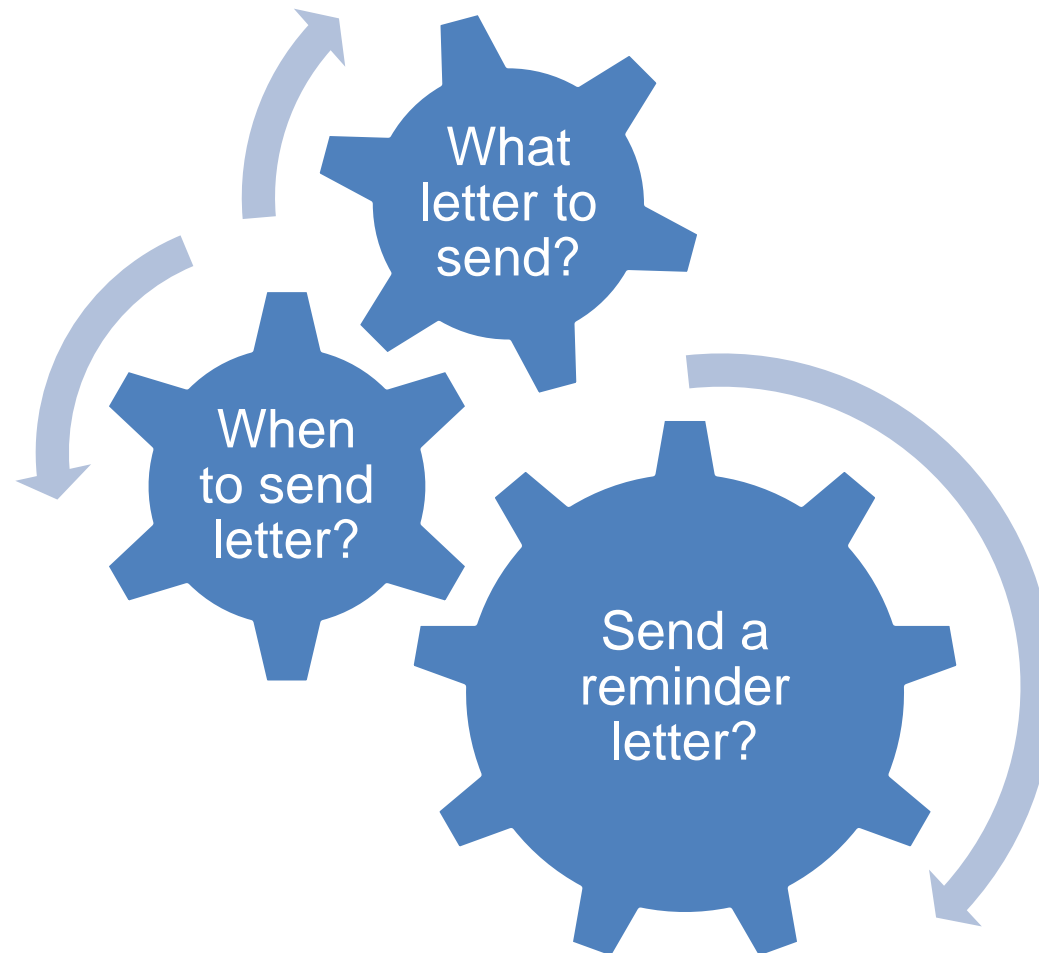# Sending / Stopping Letter Based On Circumstances

System Control 1> Letter Translation Tables

Sending Letters For Post-Dated Checks

Sending Letters: Remind Consumers Of Their Payment Arrangement

Reminder Letter
- Which letter?
- "Days-driven" frequency
- When to send letter?
- Minimum balance to send letter?

Reminder Payment Is Late
- Which letter?
- "Days-driven" frequency
- Grace period before sending letter?
- Minimum delinquent amount to send letter?
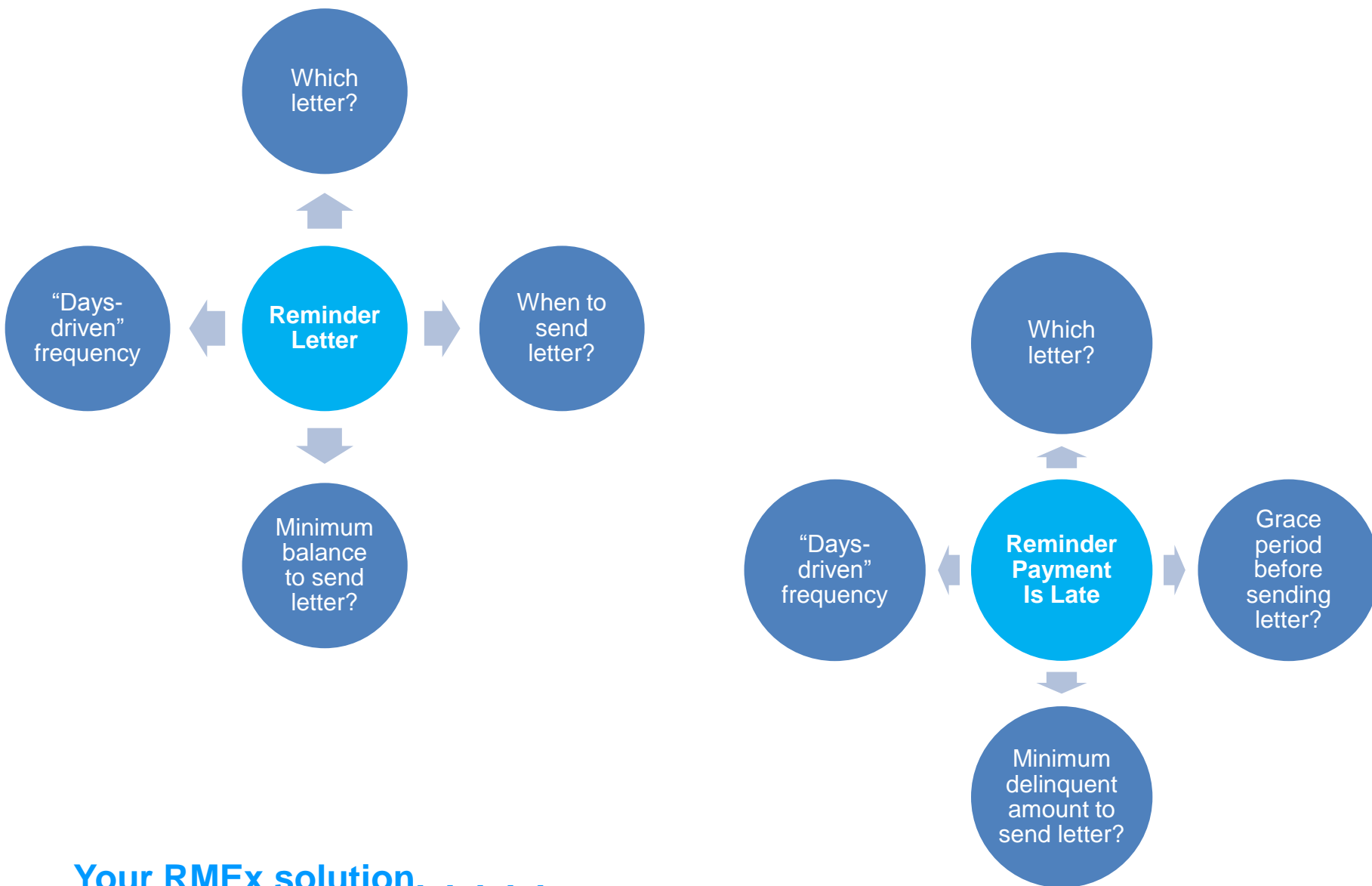
Your RMEx solution. . . . .

Sending Letters For Post-Dated Checks

System Control 1 > Post-dated Checks

Post-Dated Checks

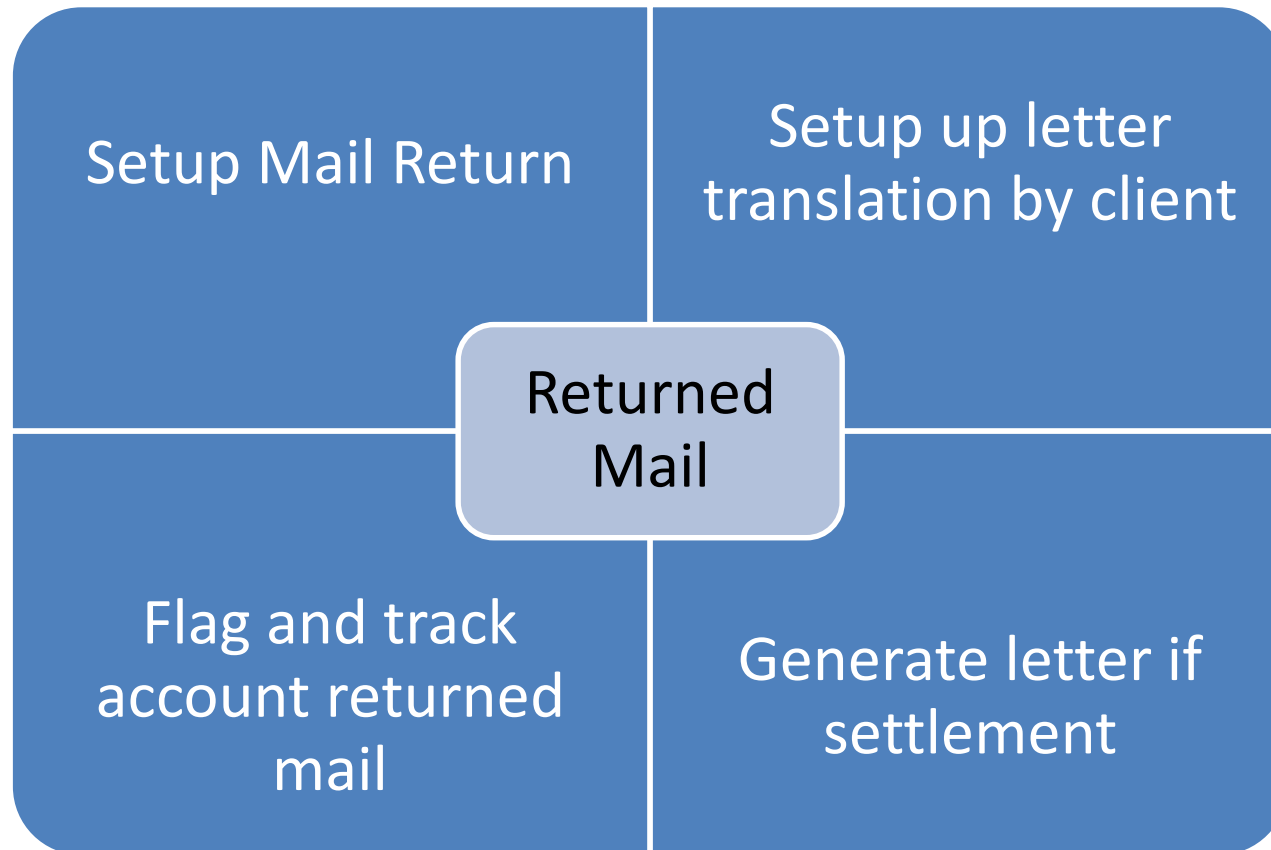Company name   QUANTRAX .7 BOX - COMPANY 99

Send a reminder (Y)   Y

How many days before the due date?   15

Letter code   Z5

ENTER-Update information   F7-Exit

Sending Letters: Remind Consumers Of Their Payment Arrangement

System Control 1 > Payment Arrangements - Page 1


```
                    Payment Arrangements   (1st Page)        * Not Required

Company name         QUANTRAX .7 BOX - COMPANY 99
Payment arrangement code  A3        Description   STANDARD

1. Send a reminder (Y) Y              C/Card      Letter code A1
   Minimum total due to send reminder              5.00   Days before
   How many days before the due date?               10    due date to
   For "days-driven" frequency, minimum days for letter      present

2. Send letter if payment is late (Y)  Y   Letter code   A2
   Minimum delinquent amount to send late letter    25.00
   Grace period (days) before sending letter           3
   For "days-driven" frequency, minimum days for letter

3. Number of missed payments before sending to       4   -->Sending to
      the collector OR                                    collector
   Minimum delinquent amount to send to collector   40.00   refers to the
      if payment is missed                                account being
   Grace period (days) before sending to collector   10    eligible for
   Suspend arrangement if sent to collector (Y)            account
   Smart Code to apply if sent to collector               processing.
4. Include legal accounts (Y,L)
5. Maximum number of installments allowed           12   -->Options are
   Minimum installment amount                        ?     specified for
```

Handling And Tracking Returned Mail

Returned Mail

- Setup Mail Return
- Setup up letter translation by client
- Flag and track account returned mail
- Generate letter if settlement

Your RMEx solution. . . . .

Setup Mail Return

System Control 2 > Returned Mail

❑ By default, the number of days they system checks for an address change is 30 days

```
                           Returned Mail


Company name         QUANTRAX .7 BOX - COMPANY 99




Do ONE of the following if there are NO Linked accounts


1. Apply Smart Code                        100


2. If balance is less than or equal to   500.00       For other balances,
   Close with code                          A          Close with code      
   Change worker to                                    Change Worker to     



If there are linked accounts, do the following


1. Apply Smart Code                       


For recent address change, number of days to check (Blank=30)
```
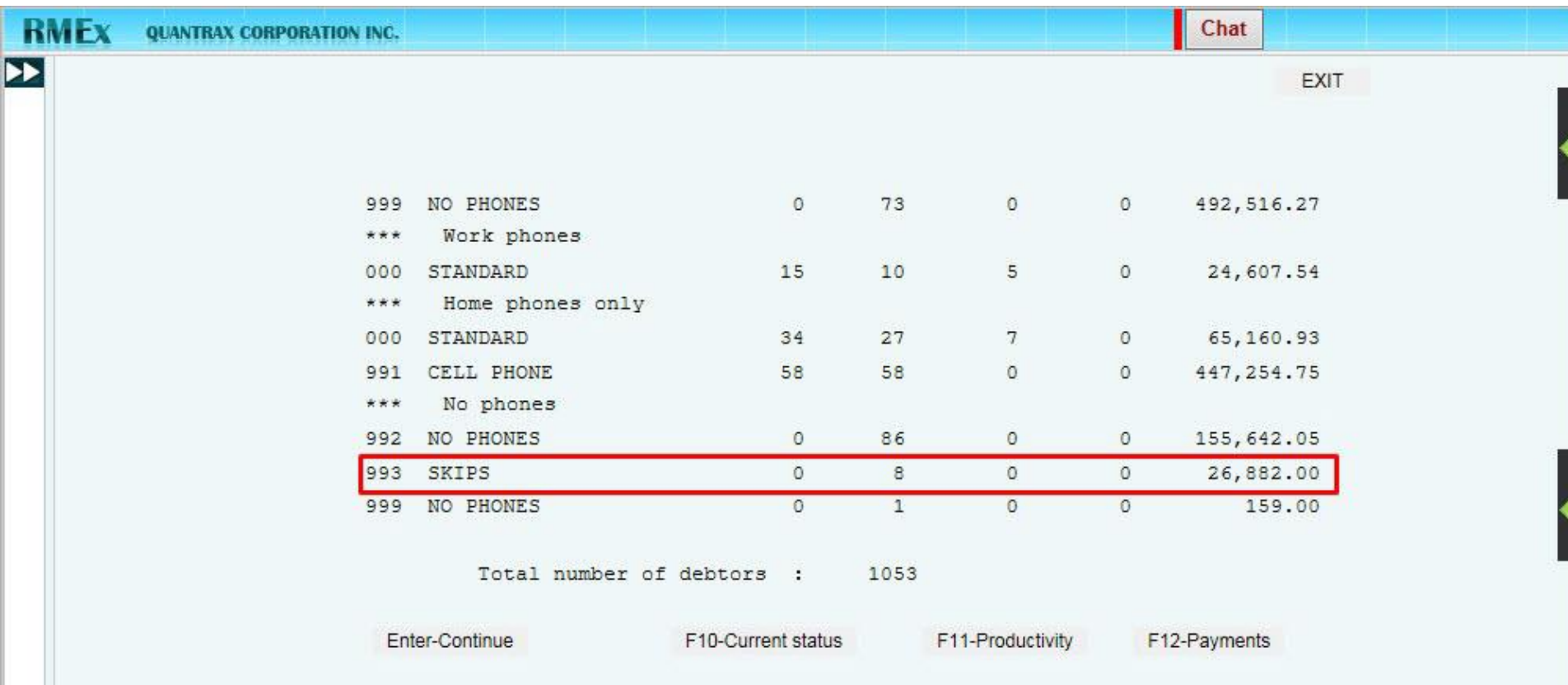
Daily Operations Menu > Mail Return Entry

❑ Automatically resend the last letter sent on the account or the last letter sent using the primary account

❑ The entry clerk can select a specific letter to resend

```
                          Mail-Return Entry


    Company name        QUANTRAX .7 BOX - COMPANY 99


    Select one                              Note Codes..........
1- Case number only                         1. Moved left no fwd.address
2- Case number & initials                   2. No such street
                                            3. Forwarding order expired
    Initials F/L                            4. Attempted-unknown
    Case number                             5. Insufficient address
                                            6. Unclaimed
    Note to be added                        7. No mail receptacle
                                            8. Deceased - unclaimed
    Extra address                           9. Mail refused
    Street address                          0. No such number
    Zip code                                F. Forwarded to new address
    City/State
    Send letter          (*A=last on account *P=last from primary)   Add D/Code
    Apply S/Code
```

Flag And Track Returned Mail

Account Processing menu > Display Accounts to be worked > F2 – Work Map

Flag And Track Returned Mail

Inquiry > Account Detail Screen > Return Mail Checkbox

Generate Letter If Settled In Full (SIF)

Management Menu > Client Update > F15 – SIF screen

```
                        Settlement Information      (Page 1)


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


Use for group (Y)          [   ]   Settlement %        [   ]   Allow for SIF% override (Y)   [   ]
Balances to          [    .00]     Settlement %        [   ]     (or amount)
 (ascending          [    .00]                         [   ]   Smart code at offer time      [   ]
   order)            [    .00]                         [   ]   Smart code with letter        [   ]


Recommended parts          [   ]   Maximum parts       [   ]   T/Frame is monthly (Y)        [   ]
T/Frame every X days       [   ]   Downpayment %       [   ]   Downpayment within days       [   ]
1st Pmt within days        [   ]   Recall days         [   ]   Manager approval (Y,S,M)      [   ]
Client approval (Y)        [   ]   Include PIF's (Y)   [   ]   Use aggregate (Y)             [   ]
Smart code for SIF         [   ]   Use Smart Code      [   ]   if amt. due is         [    .00]
Add Desc.Cd on offer       [   ]   Desc.Cd if withdrawn[   ]   Valid period for offer        [   ]
Add.Des.Cd-Let.offer       [   ]   Valid period        [   ]   Desc.Cd if withdrawn          [   ]
Letter out queue     [         ]                               Balances to include(YRA)      [   ]
Valid letter codes   [  ][  ][  ][  ][  ][  ][  ][  ][  ][  ]
Default letter             [   ]                               Letter-Print,Fax,Mail (PFM)   [   ]
Close codes for SIF  [  ][  ][  ]                              Smart code-offer withdrawn    [   ]
                                                               S/Code-Let.offer withdrawn    [   ]

 F7-Exit   ENTER-More                                  SIF period from  [      ]  to [      ]
```

Management Menu > Client Update (Page 4)

```
                        Client Update    (Page 4)


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


PLACEMENT ENTRY OPTIONS (Enter Y to omit from input screen)
  S.S.#              □      Date of birth  □      Greeting code   □      Home phone     □
  Work phone         □      Spouse S.S.#   □      Spouse (L/F)    □      Client Acct#   □
  Last Clt.Pmt       □      Interest info. □      Interest Bal.   □      Sec.Balances   □
  Patient/Other      □      Desc.Codes     □      Special notes   □      Bank info.     □


  Force other info. (Y)  □      Name for entry    □         Time frame (AMP) □
  Apply QCat             □      Apply Smart Code  □         Apply ACat       □
  Add description codes  □ □    Smart Code Series □ □ □     Smart code and   □
                                                  □ □ □         Ovr. at posting  □

OTHER INFORMATION                           Cl.Type (M,C,U,B,Q,F,A,T)    C
  Client classification   DR                Credit reporting (N,A)       A
  Forward cases (Y)       □                 Stop EQ/EX/TU/IN files (Y)  □ □ □ □
  Payment receipt (Y) for □ □ □             Alert on all Cases (Y)       Y
  Transfer to company     □                 Transfer to client           □
  Letter translation code □                 Duplicate notes (Y)          □
  Settlement percentage   □                 Fwd. rate is % of Comm.-Y    □
```
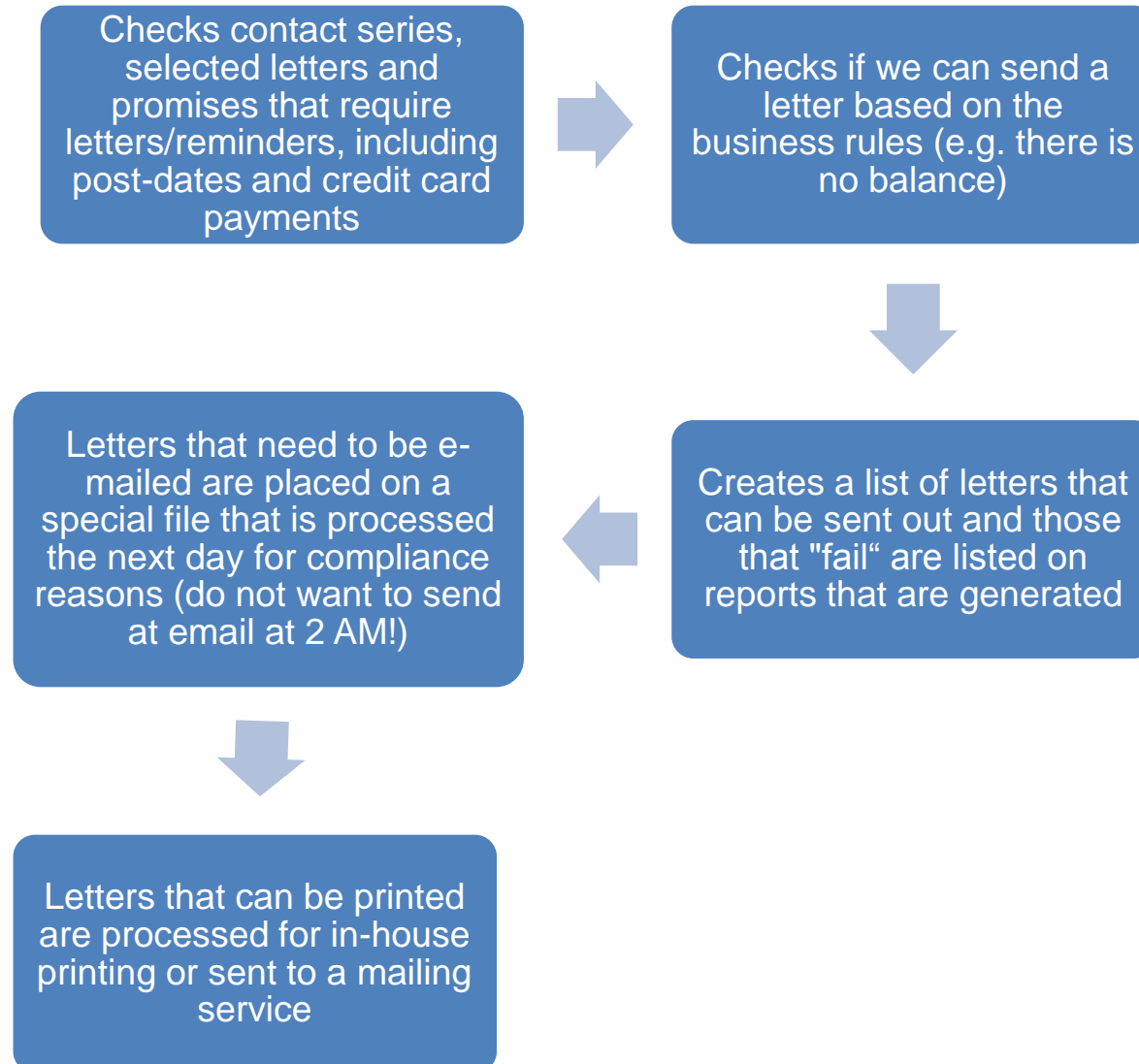
Understanding the Nightly Process Related To Letters

During the Nightly process the system:

Checks contact series, selected letters and promises that require letters/reminders, including post-dates and credit card payments

→

Checks if we can send a letter based on the business rules (e.g. there is no balance)

↓

Creates a list of letters that can be sent out and those that "fail" are listed on reports that are generated

←

Letters that need to be e-mailed are placed on a special file that is processed the next day for compliance reasons (do not want to send at email at 2 AM!)

↓

Letters that can be printed are processed for in-house printing or sent to a mailing service

Understanding the Nightly Process Related To Letters – Letter Failed Report

Understanding the Nightly Process Related To Letters – Letter Failed Report

```
                           Display Spooled File
File  . . . . . :      QSYSPRT                          Page/Line    1/2
Control . . . . .                                       Columns      1 - 78
Find  . . . . . .
*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+...
Run Date      :  02/02/16    2:34:13
Work Date     :  02/01/16
                    LETTER PRINTING REPORT - FAILED
Company : Kalara Attorney Group
Letter    Name                          Case #     Status   Reason
  L1    COLLECTIONS     COMMERCIAL        132970003  Failed   Letter not defined
Number of L1 Letters Failed :          1
Number of L1 Letters Generated :
Grand Total of Letters Failed :        1
Grand Total of Letters Printed  :
```

In your system, use COMPANY 99

1. Set up letter code T1 as a standard letter. Set up the system controls and the format of the letter as if it was to print in-house.

2. Set up Contact Series 01 – send 2 letters, 35 days apart. Stop the series if there is a payment or a contact.

3. Go into an account and request letter T1 using a smart code. How can you tell the letter was requested?

4. From the letter options, run the option to print selected letters. Did you get the letter to print? Did you see the account on the letters printed report?

5. Set up a letter T2, similar to, but different from T1.
   - Check the client code on the test account.
   - Teach the system to send a T2 whenever you request a T1 for that client.
   - Try requesting a T1 and then print the letter.
   - What happened? Check the accounts.
   - Can you see the history of letters sent?

6. Set up a smart code to request a T1, and add a note to the account.
   - Apply the smart code.
   - It takes a few minutes for the smart code to process. Did the letter go into letters pending?
   - Print the letter.

7. Set up a P/D check reminder, PD. Set up the merge codes. You can test this after you are able to run nightly processing.

8. Request a T1 on an account. After the letter is in letters pending, close the account. Print the letters. What happened? Is that what you would have expected?

9. Set up an account. Add an attorney to the account. Request a T1. Print the letter. What happened? What is the difference between this and the other T1's?

10. Think about how you would send a Spanish letter when a T1 was requested for a Spanish-speaking consumer.

11. You want to send an IDL and then make 2 phone calls within the first 60 days, and send one more letter only if there are no phone numbers. How would you do that?

12. A consumer says "Don't send me mail" What do you do to stop mail from going out?

13. You have worked an account and want to give up… but want to send 2 letters before you close the account.

- Set up a contact series to send 2 letters, 27 days apart.
- Set up a smart code to start that contact series.
- Apply the smart code. What happened?
- Check the second account detail screen?
- You should have a smart code "Consumer called us". Make that smart code stop any contact series.
- Apply the smart code and wait a couple of minutes.
- Did the contact series stop?

14. Change the client on test account to increase the rate for returned mail.

- Mark the account as "returned mail".
- What happened to the commission rate?

RMEx Management Training: Generating Mail And Related Documents

Thank you!