

IES Medical: Payment Chase

Purpose

The purpose of this Document is to introduce the Medical Payment Chase system.

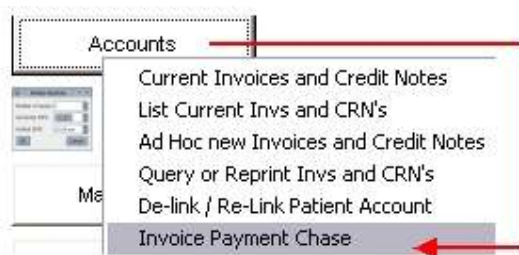


Introduction

Payment Chase is an in-built tool in the Medical system to facilitate Debt Collection. Medical Practices typically provide services ahead of payment, and sometimes wait long for Medical Aid Claims or Accounts to be settled, which adversely affects the cash flow of the business. Payment Chase is designed to assist you in collecting payment of outstanding Invoices.

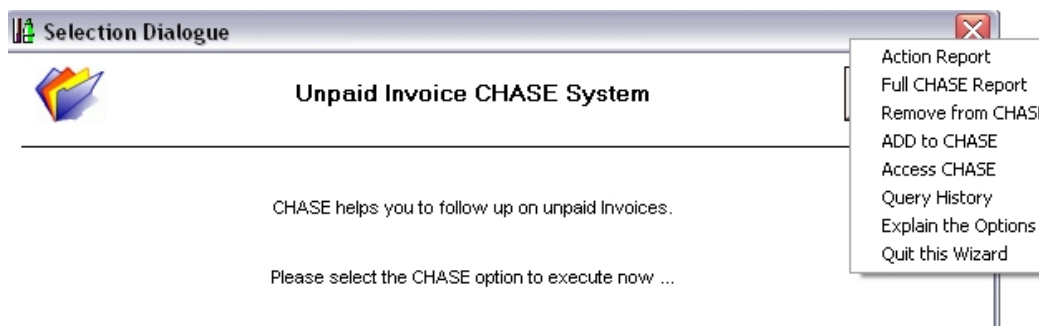
Selecting the Payment Chase Function

Payment Chase is selected from the sub menu of the ACCOUNTS function, from the main Medical menu.




Select Accounts 1st, then select Invoice Payment Chase.

The Invoice Payment Chase Options



The Payment Chase system is based on a current list of Chase Items (i.e. Invoices not fully paid after some time) that is managed by following up on these Items, adding new Items when necessary, and removing Items when payment has been received.

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Action Report

The Action Report will include Chase Items selected on the basis of an action date range as specified by you. In other words, all Items that require some action during the selected date range is included and reported on.

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CHASE Action Report

Invoice #	Action Date	Open Amount	Invoice Total	Owner / User	Account
0000440	17/11/2006	18.40	28.40	Data Manager	D-R-0-0009 Verdoef
0000461	17/11/2006	0.71	5.00	Data Manager	D-R-0-0004 Gomez
		19.11	28.40		

The action report includes, for each action, the Invoice Number, the Action Date (i.e. follow up date), the Amount not yet settled, the original Invoice total, the Owner of the Chase Item (i.e. person 'to do'), and the Patient Account.

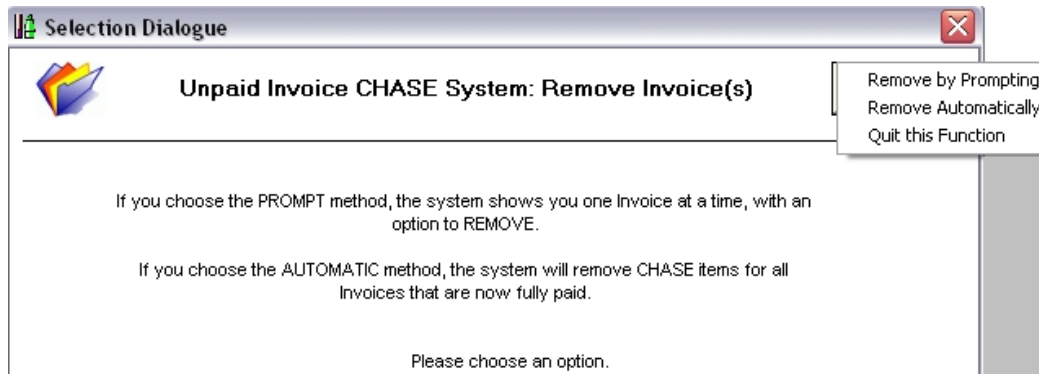
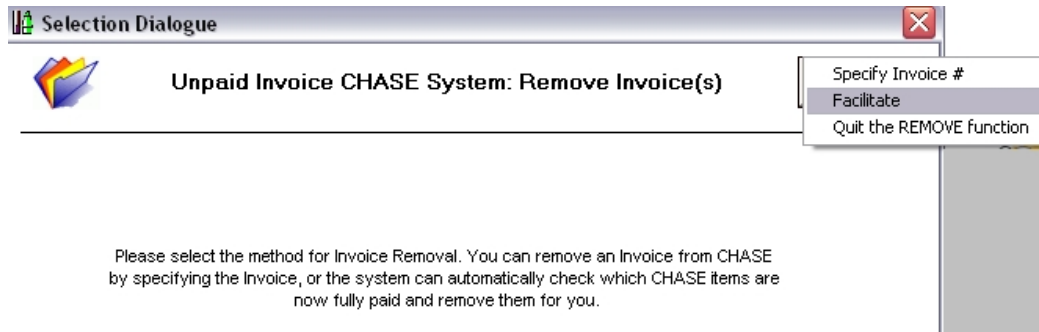
Full Chase Report


This option includes the same detail as for the Action Report, but lists ALL Items currently on the Chase system.

Remove from Chase

There are 2 ways to remove Items from the Chase list: -

- Manually, by specifying the Invoice number to remove.
- Facilitated, where the system automatically inspects current Items, and if there is no longer any outstanding Amount, then the Item is removed.



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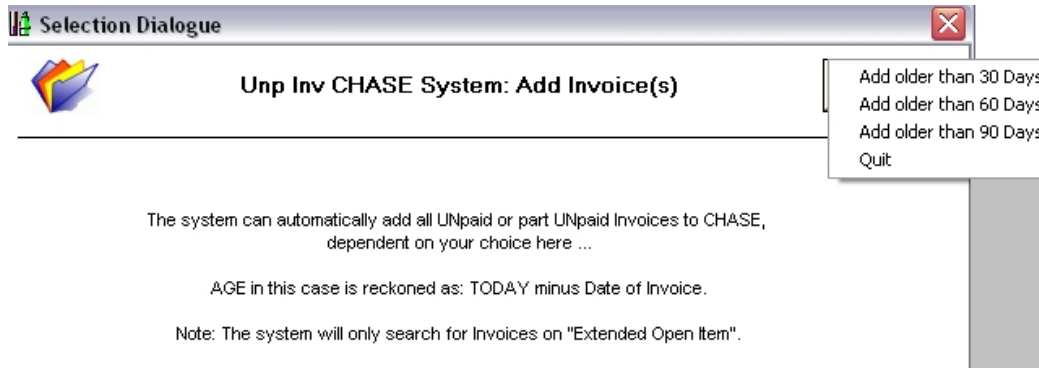
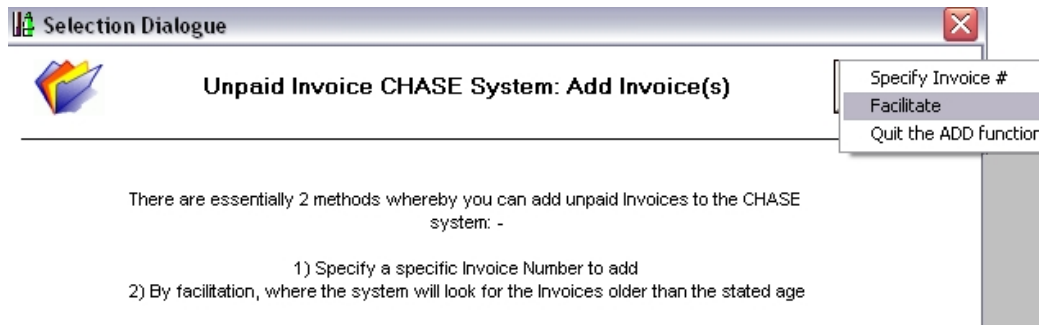
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When the 'facilitate' option is selected, you can further choose whether qualifying Items should be removed without prompting, or whether you should be prompted for each Item, i.e. to confirm removal.

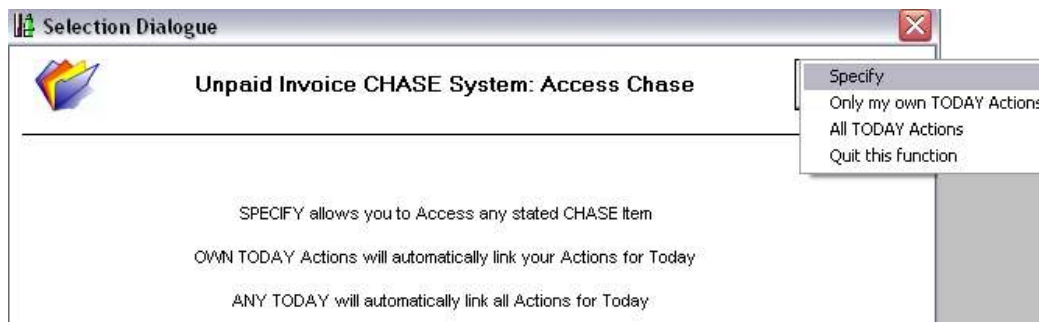
Add to Chase


There are 2 ways to add Items to the Chase list: -

- Manually, by specifying the Invoice number to add.
- Facilitated, where the system automatically inspects open Invoices, and if an Invoice is not yet fully paid AND it is older than the selected "age", then that Invoice is added to Chase.



Access Chase



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This option is used to work with a Chase Item, e.g. follow up, phone the Account Holder, send another Statement and request payment, etc.

You can choose to specify the specific Item to work with, or enter a session based on selection of your own actions for today, or all actions for today, and where the system will offer one Item after the other to work with.



Unpaid Invoice: CHASE

Invoice #	1000440	Invoice Date	17/11/2006	Invoice Date	16/08/2006
Action Date	17/11/2006	Age in Days	99	Invoice Total	25.48
Created / User	Data Manager	Patient	ET: BE: Vendor E. Flat	Fee	5.00
Med Customer	ET: BE: Vendor E. F.	AR Debtor Account	E-H-0-0005: Invoice2	Net Paid	20.48

Chase Notes

- Save
- Patient
- Account Holder
- Invoice
- AR Debtor Account

On the Action screen, details are displayed for the Invoice and Patient, and you can drill into the Patient, Account Holder, Customer Account and Invoice records.

The Chase Notes are provided to record a history of actions taken to collect payment, and any further relevant details you wish to specify in progressing the matter.

Query History


This function allows you to query all CHASE History for a specified Account Holder.

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Additional Keywords

Debt Collection

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