RMEx Management Training:
Setting Up A Client In RMEx

Setting Up A Client In RMEx

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Client Information / Demographics. Setup correctly merge codes can pull from this

GROUP Number.
Is this client part of a GROUP? If one client places new accounts under several different client numbers, you can "group" these individual client.
Possible uses:
Combine reports
Combine Statements

Client Update

Company Name	MODEL COMPANY (98)		
Client Code	009901	Group Number	9901
Client Name	STANDARD MEDICAL		
Description	EMERGENCY ROOM		
Contact	DR JONES	Search Name	MEDICAL
Address			
	1234 PLAZA CIRCLE		
City-State-Zip	BETHESDA MD 20814	Last Placed	3/22/12
Phone Number	301 222 1234	Salesman Code	
		Start Date	8/25/08
Fax Number	301 222 1235	Reports to	
Active Cases	4	Active Amount	400.00

	Month-to-Date	Year-to-Date	To-Date
New Cases	0	4	4
New Business Amount	.00	400.00	400.00
Payments	.00	.00	.00
Commissions	.00	.00	.00
Per-case Charges	0	0	
Client Receivables	.00	Client Payments	.00

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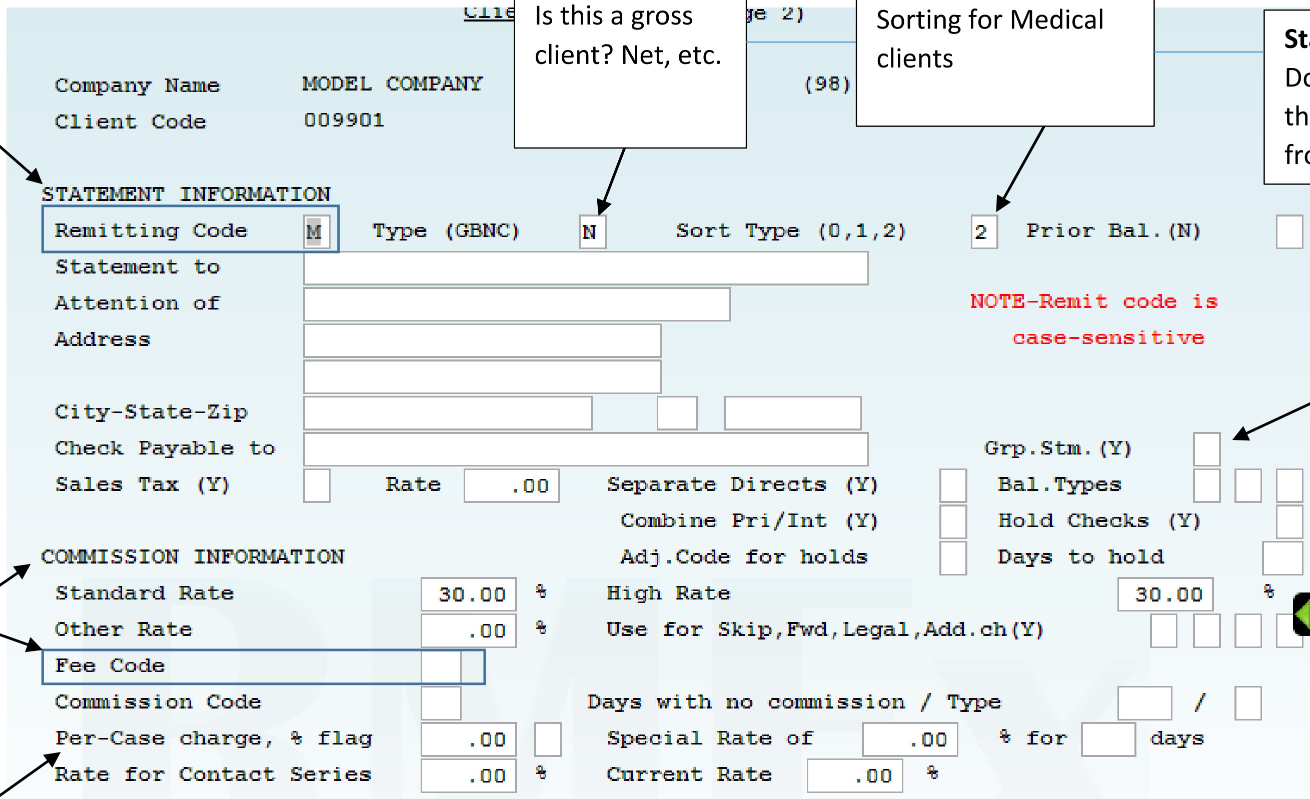

Statements:
Is this a gross client? Net, etc.

Statements:
Sorting for Medical clients

Statements:
Do they need to see the prior balance from previous

Statements:
How often do you remit / send a statement to this client?

Statements:
If using Group Number on prior page, do you need a group statement (All clients in group on one statement)?

Commission:
You can setup the fee rates at the client update, or use a Fee Code to set commissions based on age at placement, balance etc.

Statements:
Review with Quantrax if you are charging per-case, or per-letter

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Client Update (Page 3)

Company Name MODEL COMPANY (98)
Client Code 009901

PLACEMENT INFORMATION
Last placement date was 0/00/00 Link Code (Blank=Stop) 01
Contact Series Client Code Contact Series 01
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 00 Special Logic (Y) for Prop.

STANDARD REPORTS	(Y)	Frequency (M,Q)	Type	Reporting Area	
Status Report	Y	M	7	Reporting Division	
Close-out Report	Y	M		Consolidation Code	
Activity History				(must be a Client Code)	
Regression Report	Y	M		Pre-Collect type	
Acknowledgement (D,M)	Y	D	6	E-mailing options (Y)	
Placement History	Y	M	9	Send to Web Server?(Y)	

Linking \ grouping accounts:
Used to consolidate a group of accounts belonging to one consumer

Balance Types:
Other than a primary balance on an account, do you need to add other

Letters and\or Phone series.
Automating sending letters on accounts and/ sending them to a dialer

Reports to Client:
What reports would you like to automatically send to this client?

Emailing reports to client?

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Company Name MODEL COMPANY (98)
Client Code 009901

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.	Y	Interest Bal.	Y	Sec.Balances	
Patient/Other		Desc.Codes		Special notes		Bank info.	

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

OTHER INFORMATION

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

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

What type of client is this?:
Medical, Commercial etc?
Note: This controls the "Other Information" screen on the consumers account.

Credit reporting:
Does this client do credit reporting?

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Interest on accounts:
Do you charge interest? If so at what rate, how often (Monthly or Daily). Based on when the account was loaded into RMEx, or the last time your client interacted with the consumer (Last transaction date)

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Payment Arrangement:
Rules regulating how and when payment arrangements can be setup, letters sent etc.
Note: Blank uses Company Defaults

e 5)

Company Name MODEL COMPANY (98)
Client Code 009901

Interest rate .0000000 % Posting frequency (D/M) On new placements (Y)

Smart Code MC Payment Arrangement Code
Overrides Use ACat for............ Work Group(Y)
Contact Series (Y) Smart Codes (Y) Y
Client Sues (Y) Auth Upfront Fees (A/C) Fees
Plaintiff County

Notes
Collector Notes
CUSTOMER SERVICE #1.888.921.0101

SEND PAYMENTS TO: 8000 MAIN STREET
ROCKVILLE, MARYLAND 20817

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

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Balance Types:
Do you need to have specialized balance types for this client? Blank uses Company defaults

Client Update (Page 6)

Company Name MODEL COMPANY (98)
Client Code 009901

MEDICAL BILLING OPTIONS
Federal Tax ID# Tax ID# is SSN (Y)
PIN# Accept Medicare (N=No)
NPI#

SALES INFORMATION
Competitor code Name
Important dates Reason

Code for special balance type options Financial code
Priority for payment distribution (A-Z) Trust account code

SPECIAL NAME/ADDRESS FOR INSURANCE BILLING
Client name
Address
City-State-Zip

Exercises – Setting Up A Client In RMEx

In your system, use COMPANY 99

Set up client with following options:

- Client code 999999
- Group code 999999
- Salesman code of 01
- Remit code M
- Standard fee of 25%
- High rate 50%
- No commission taken for first 10 days
- Link code of 01
- Work group df
- Monthly status report, closed report and placement history
- Mask phone numbers.

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Thank you!