

This document discusses the new features in RMEEx Version 3.0:

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## Management Changes

### Account List for Audit - Adding a Multiple Client Range & Saving a Sub List

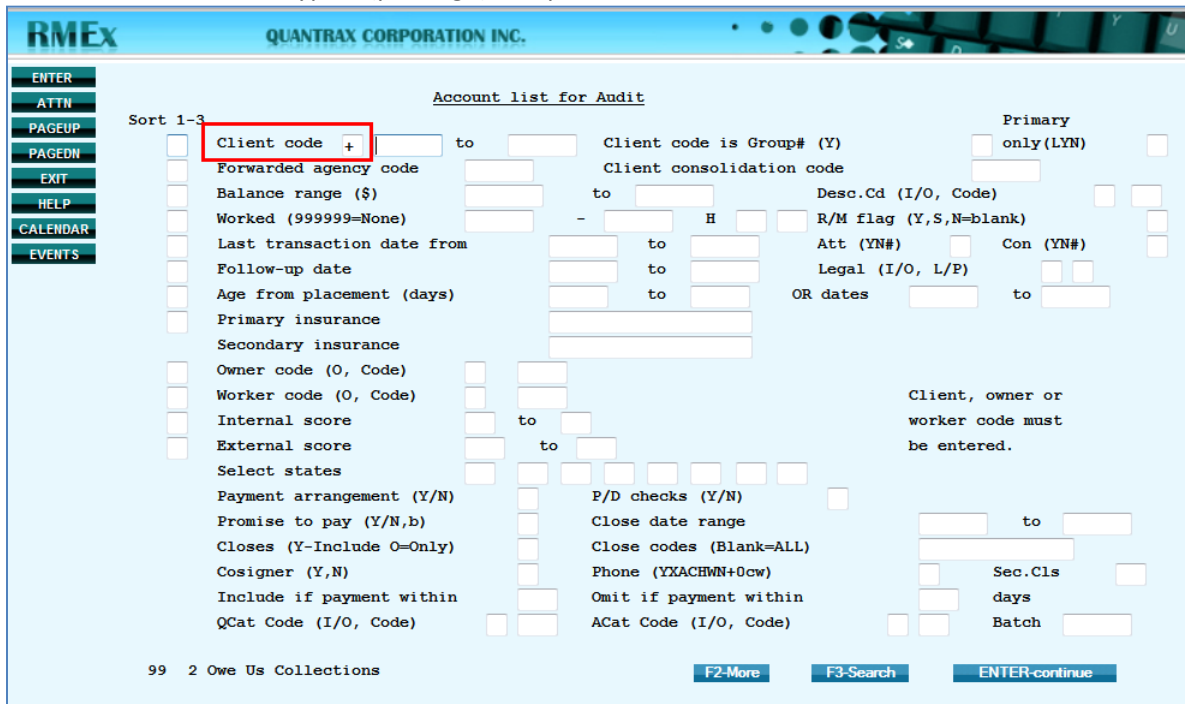
The option **Account List for Audit** gives you the ability to select and sort accounts using various options, depending on your requirement. Within **Account List for Audit** you can sort accounts by a range of client codes and save a subset of the audit list.

#### To Add Multiple Client Range(s) to Account List for Audit:

1. From the *RMEEx Main menu*, select **Management menu** then select **Smart Code/User Audit options**
2. From *Management menu*, select **Smart Code/User audit options** then select **Display accounts for audit**



3. From *Account list for Audit* menu select **Run account list for Audit (Batch/Interactive)**
4. In the *Client Code* field, type **+** (plus sign) and press **Enter**



- Type the *Client Range* and press **Enter**

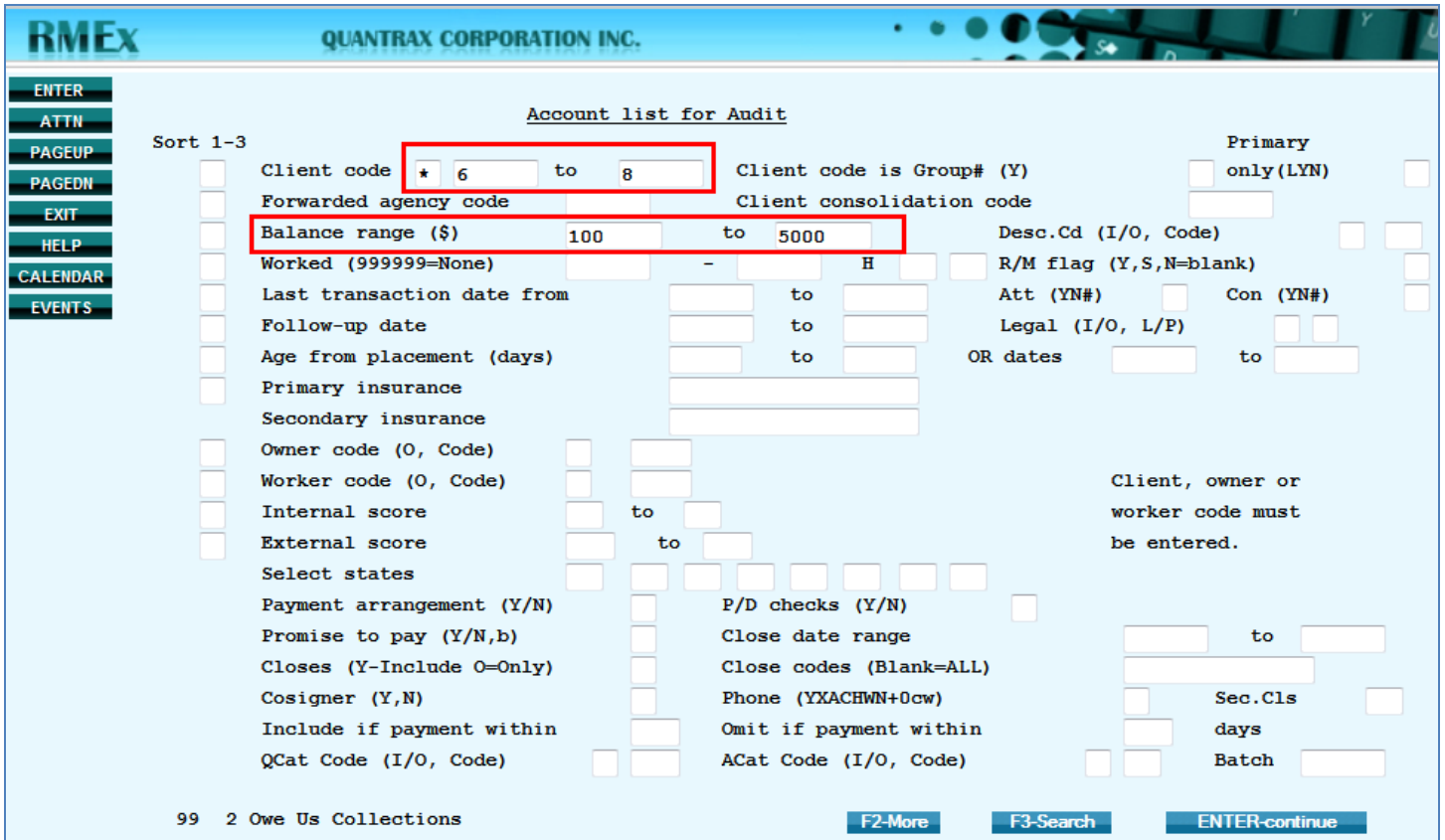
**EXAMPLE:** To audit the accounts of Clients 6, 7, 8 and 10 enter the *Client Range* is shown below:



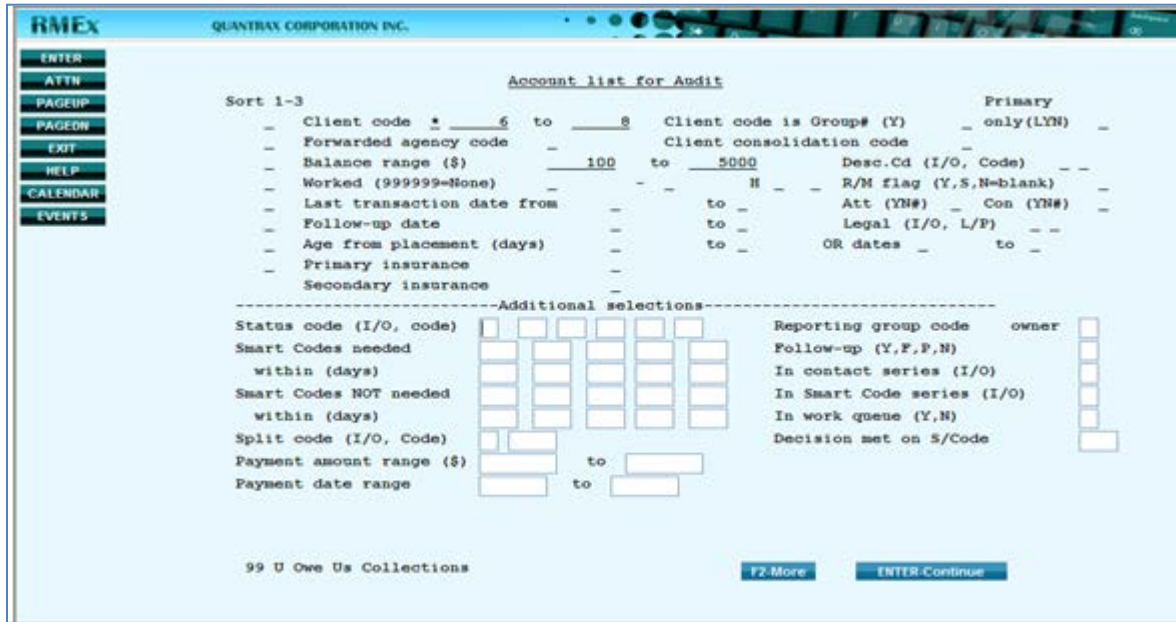
- In the *Account List for Audit* screen, type the details for the account(s) and press **Enter** when done

**NOTE:** The *Account List for Audit* screen will now show \* (asterisk) where you entered + (plus sign) to indicate that you have entered a *Multiple Client Range* under that field

**EXAMPLE:** To audit the accounts with the *Balance Range* (\$) of 100 to 5000 is shown below:



7. The Additional Selection screen displays; type other account details or to proceed press **Enter**



8. Choose to save it as a **Batch** or run it **Interactively**:

**Example 1: Batch mode**

a) Select **I** for Interactive and Search Results will display

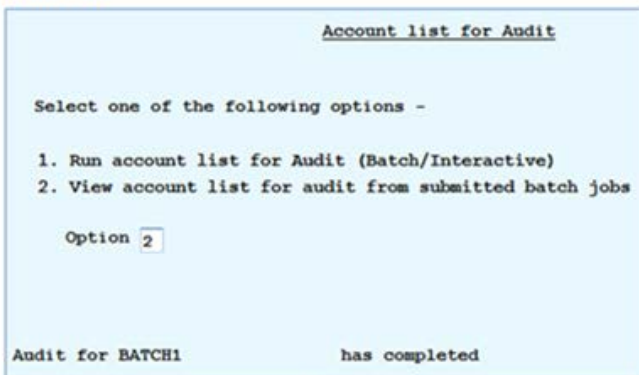


**Example 2: Interactive**

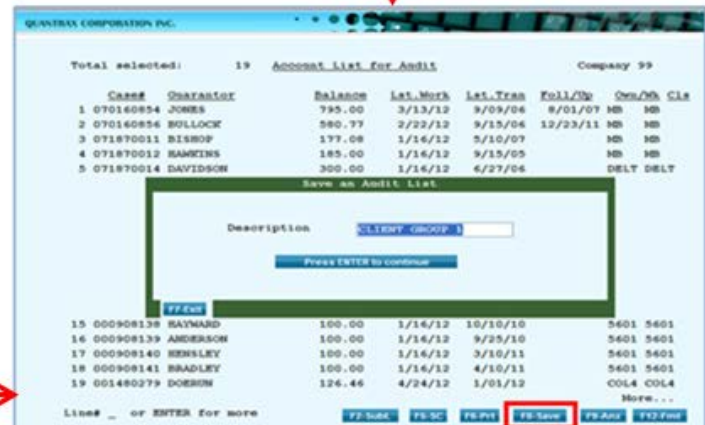
a) Select **I** for Interactive and the Search Results will display



b) Select **2** to view account list, then select list to be displayed



b) Press **F8** to **Save** audit list



## To Save a Sub-list of Account List for Audit

1. After you have run your *Account List for Audit*, press **F2 – SubL** to create a sub list

Account List for Audit

Case#	Guarantor	Balance	Lat. Work	Lat. Tran	Foll/Dp	Own/MS Cls
1 000908138	RAYNARD	100.00	1/16/12	10/10/10		5601 5601
2 000908139	ANDERSON	100.00	1/16/12	9/25/10		5601 5601
3 000908140	HENSLEY	100.00	1/16/12	3/10/11		5601 5601
4 000908141	BRADLEY	100.00	1/16/12	4/10/11		5601 5601
5 070160856	BULLOCK	580.77	2/22/12	9/15/06	12/23/11	MB MB
6 071870011	BISHOP	177.08	1/16/12	5/10/07		MB MB
7 071870014	DAVIDSON	300.00	1/16/12	6/27/06		DELT DELT
8 071870015	SENTLAND	320.00	1/16/12	1/01/06	9/22/11	MB MB
9 071870017	DELANEY	420.00	1/16/12	6/21/06		MB MB
10 071870018	BRIGGS	510.00	1/16/12	12/10/04		MB MB
11 071870021	HAYDEN	620.00	1/16/12	10/19/06		MB MB
12 090960352	SAENZ	420.23	1/16/12	6/02/09	1/30/12	MB MB
13 911657302	MESSERROLL	200.00	2/21/12	1/01/10	3/24/12	GUI GUI

Line#  or ENTER for more

F1 Back **F2 SubL** F5 SC F6 PVT F8 Save F9 Ans F12 Fnd

2. Select options to sort out accounts for your sub list then press **Enter**

**EXAMPLE:** Selects certain phone numbers that exist on the account detail screen

Account list for Audit

Sort 1-3

Client code \* 6 to 8 Client code is Group# (Y) Primary only (LYN)

Forwarded agency code Client consolidation code

Balance range (\$) 100 to 5000 Desc.Cd (I/O, Code)

Worked (999999=None) - H R/M flag (Y,S,N=blank)

Last transaction date from to Att (YN#) Con (YN#)

Follow-up date to Legal (I/O, L/P)

Age from placement (days) to OR dates to

Primary insurance

Secondary insurance

Owner code (O, Code)

Worker code (O, Code) Client, owner or worker code must be entered.

Internal score to

External score to

Select states

Payment arrangement (Y/N) P/D checks (Y/N)

Promise to pay (Y/N,b) Close date range to

Closes (Y-Include O=Only) Close codes (Blank=ALL)

Cosigner (Y,N) Phone (YXACHWN+Ocw) Y Sec.Cls

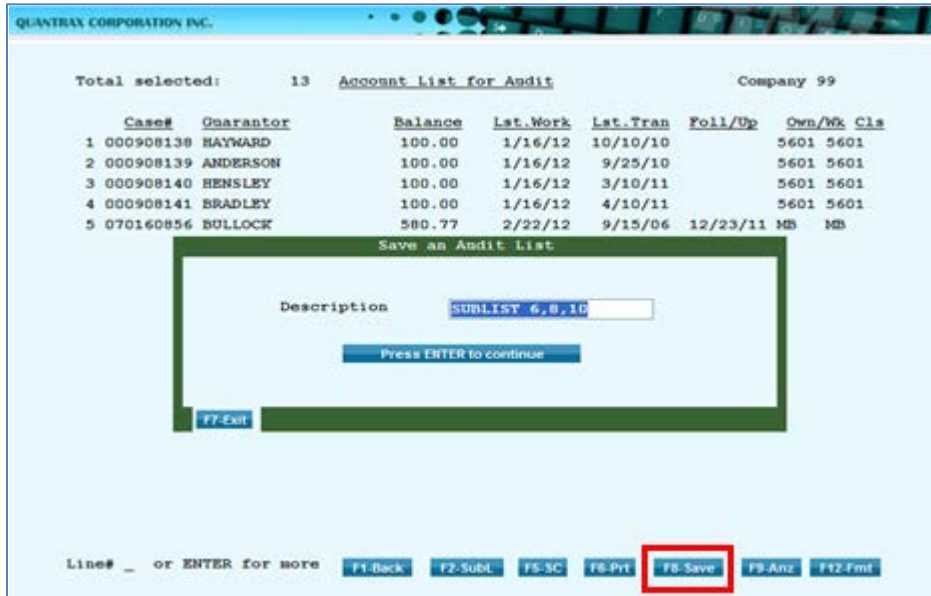
Include if payment within Omit if payment within days

QCAt Code (I/O, Code) ACat Code (I/O, Code) Batch

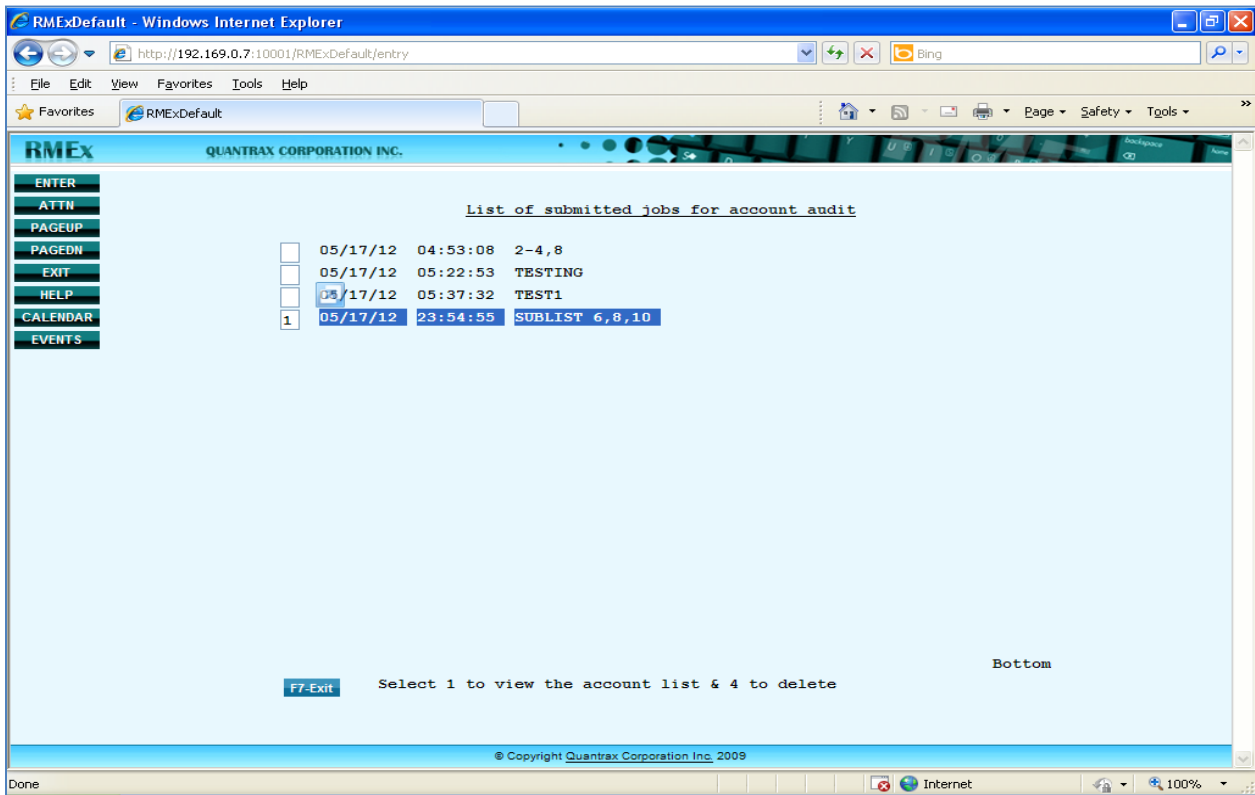
99 2 Owe Us Collections

F2-More F3-Search ENTER-continue

- To Save the Sub List, press **F8** and type a *Description*



- To view the Sub list you saved, select option **2** to view the account list submitted to batch jobs, then type **1** next to the list to be viewed



## Collector License by State

This new feature available in RMEEx GUI version 3.0, allows you to permit users (Collectors) to work debtor accounts by the state. Each state has different rules, depending on state rules. The collection agency may need to have a license and some states may require the collector to be licensed for that particular state. The license can be a *collector license* or a *common state license*.

**NOTE:** Continue to define state controls from the **System Control menu > State Options**



Click icon to listen to the importance of using *Collect License by State* and how it is different from *State Controls*!

### To Setup Collector / Common State License:

1. From the *RMEEx Main Menu* select **System Control menu**, then select **System Security**

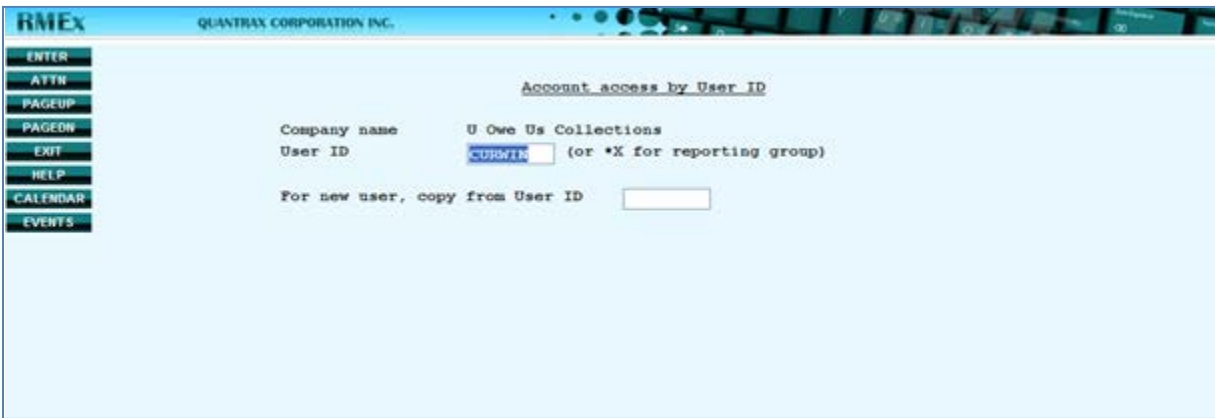
The screenshot shows the RMEEx System Security menu. The title bar reads "RMEEx QUANTRAX CORPORATION INC.". On the left is a vertical menu with options: ENTER, ATTN, PAGEUP, PAGEDN, EXIT, HELP, CALENDAR, and EVENTS. The main area is titled "System Security" and contains the text "Select one of the following options -". A list of options is displayed, with option 7, "Account access by User ID (or reporting group code)", highlighted in blue. Below the list is an "Option" label with an empty checkbox. At the bottom are two buttons: "F7-Cancel" and "Press ENTER to Continue".

2. From the *System Security menu*, select **Account access by User ID (or reporting group code)**

The screenshot shows the RMEEx "Account access by User ID" setup screen. The title bar reads "RMEEx QUANTRAX CORPORATION INC.". On the left is a vertical menu with options: ENTER, ATTN, PAGEUP, PAGEDN, EXIT, HELP, CALENDAR, and EVENTS. The main area is titled "Account access by User ID" and contains the following fields: "Company name" with the value "U Owe Us Collections", "User ID" with an empty input box and the text "(or \*X for reporting group)", and "For new user, copy from User ID" with an empty input box.

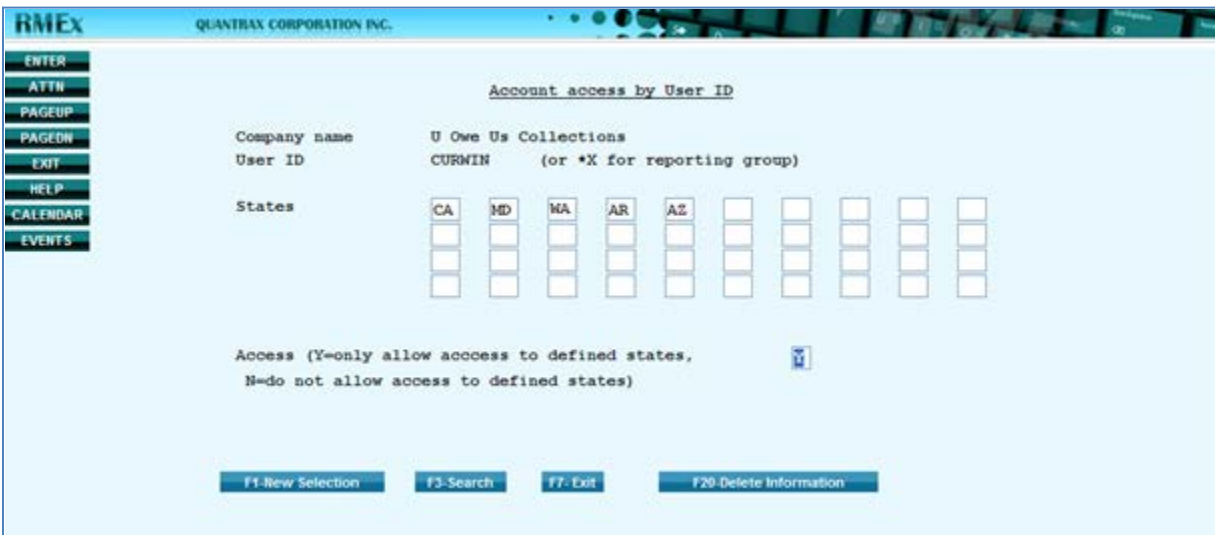
3. Enter a **User ID** or a **Reporting Group code**

**NOTE:** To enter a *Reporting Group*, in the User ID field type in an asterisk (\*) followed by **Reporting Group code** such as \*XX. Use this for Collectors have to be grouped by a *Reporting group code*.



4. Enter **state** abbreviation

**NOTE:** For agencies that have a *Collector license* for several states, you can add multiple state codes under that particular *user id* (Collector). If an agency has obtained a *state license* for particular states, several Collectors (Reporting Group) can work the accounts of those states.



5. In the *Access* field enter **Y** (only allow access to defined states) or **N** (do not allow access to defined states), then press **Enter** to save

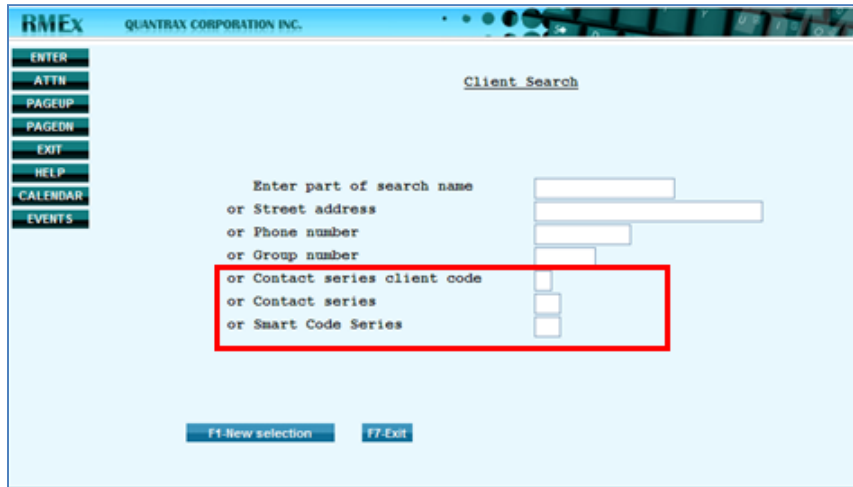
### Search for Clients by Contact Series, Contact Series by Client and Smart Code Series

In RME X GUI 3.0, the *Client Search Option* has additional options to search by *Contact Series*, *Contact Series by Client* and *Smart Code Series*. This provides seven options in total for searching in *Client Inquiry*.

#### To search for clients by Contact Series, Contact Series by client and Smart Code Series:

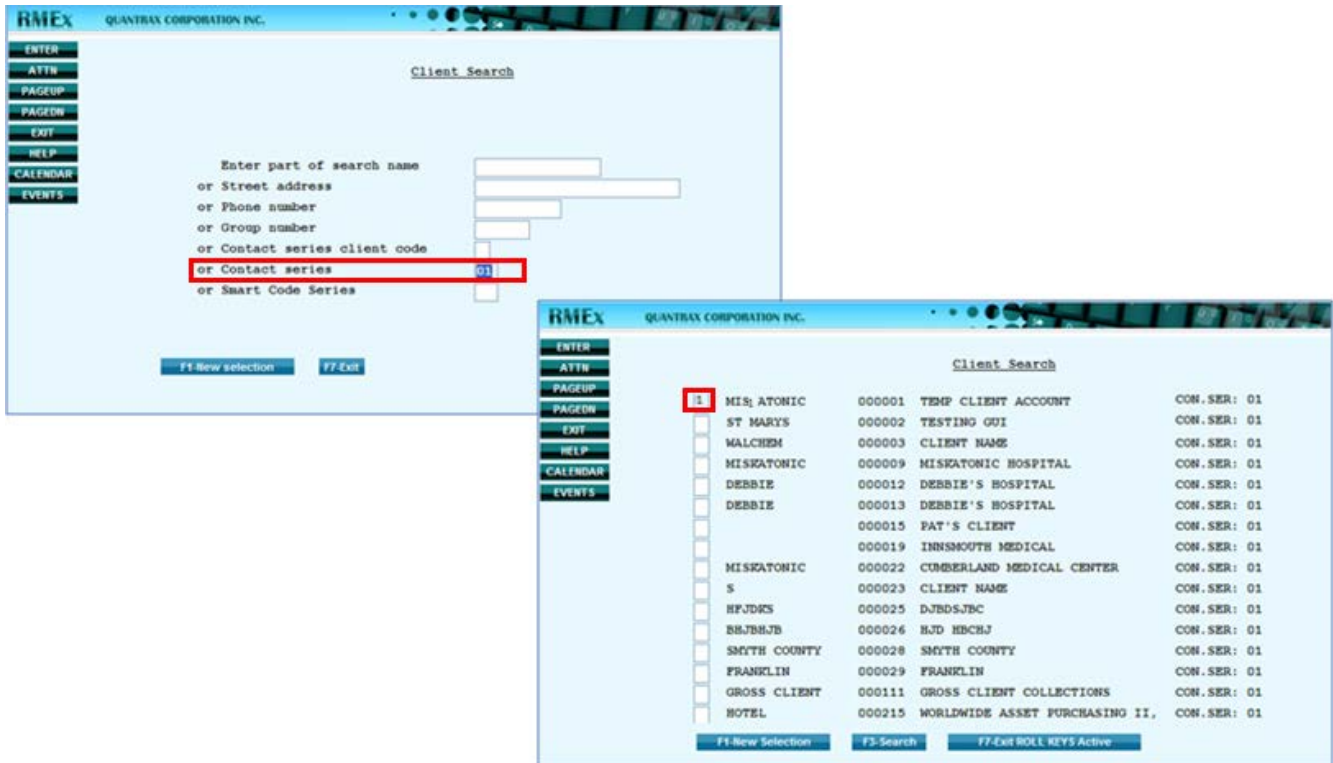


1. From the *Main Menu*, select **Management** menu, then **Client Inquiry**
2. From the *Client Search* screen, press **F3** to search



**To search for clients by Contact Series:**

1. From the *Client Inquiry* type in search details and press **Enter**, then type **1** in front of the client name you want to select



**NOTE:** Use the same steps to search by *Contact series client code* and *Smart Code Series*

## Analyzing Account Processing Queue

The *Analyzing Account Processing Queue* feature allows managers to look into a queue and analyze the accounts in the queue. Use it to view the total numbers, amounts, percentages of an account queue for a collector; including the *Unit yield* for the batch, which is a very important factor in analysis.

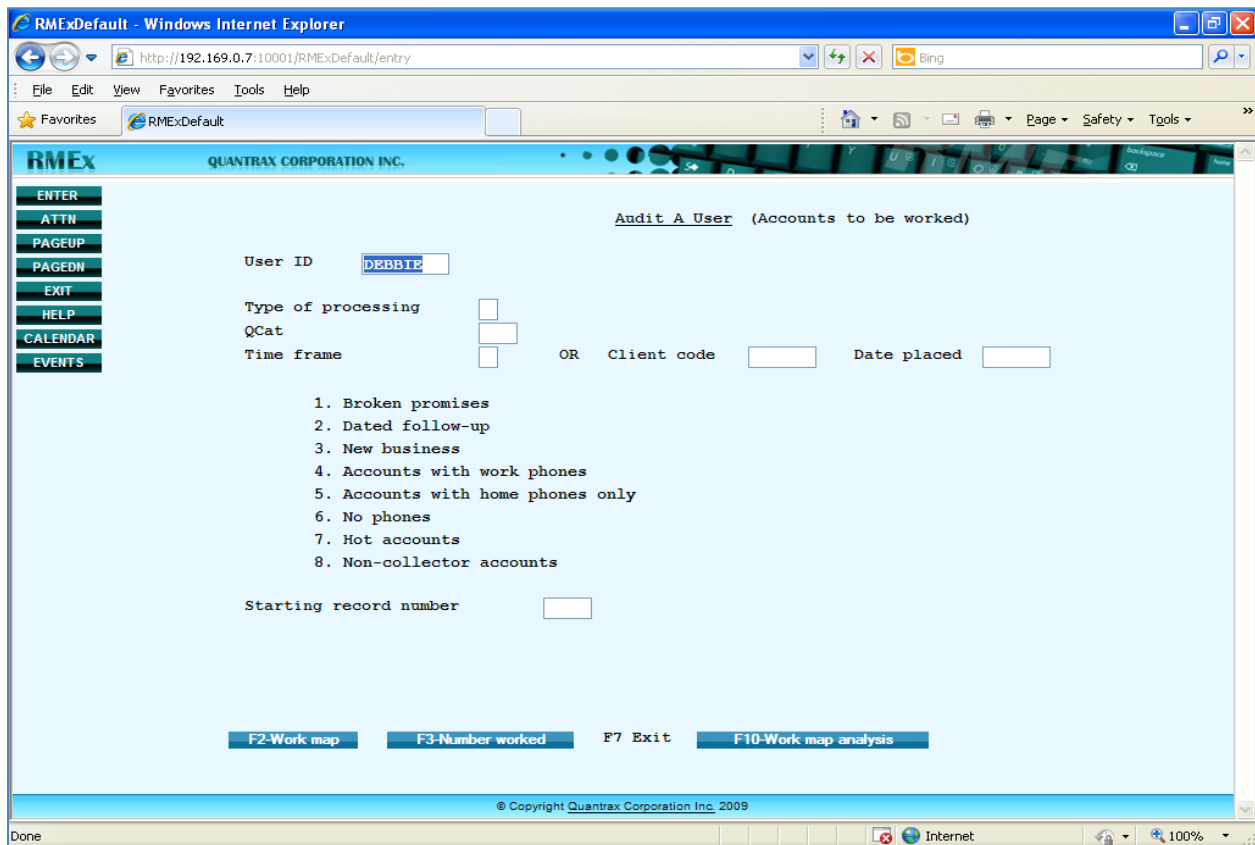
**NOTE:** To use this option you need to have the RMEEx 2 environment



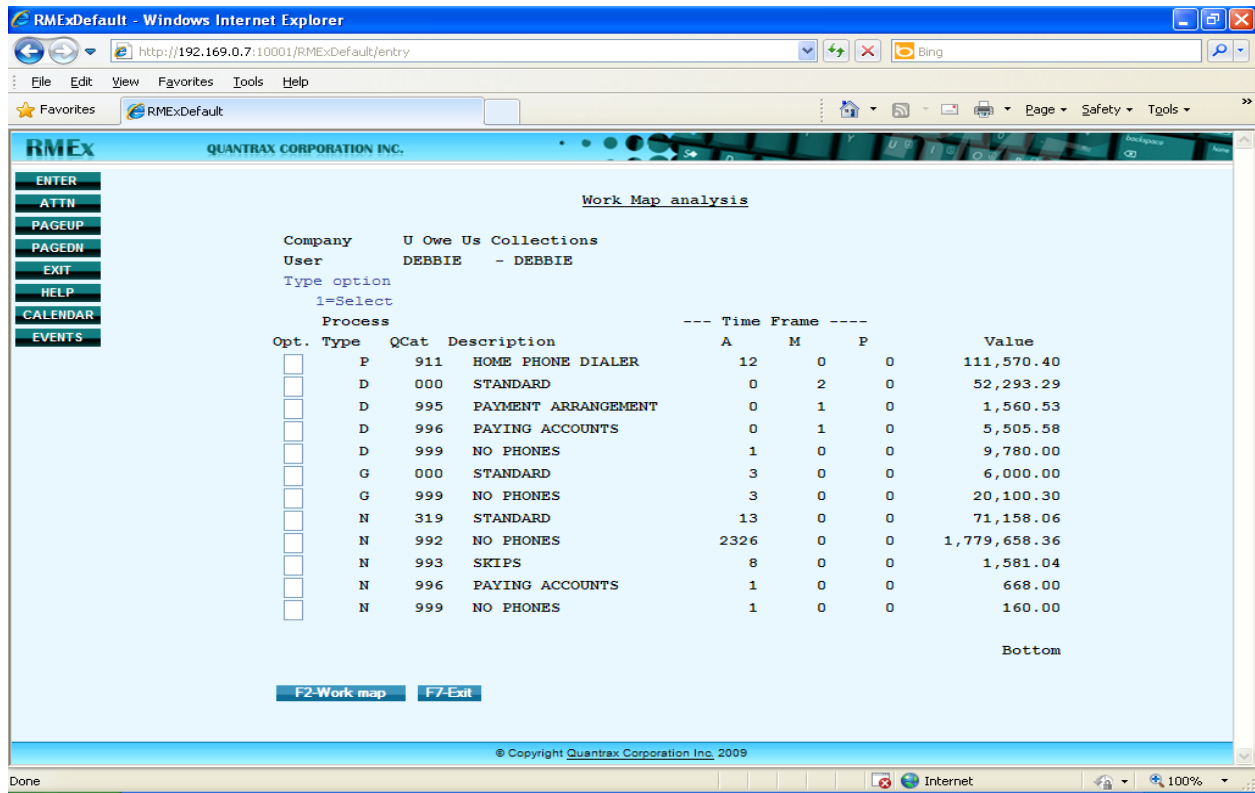
Click icon to listen to the benefits of using *Analyzing Account Processing Queue* and what you want to do after you analyze a queue!

### To use Analyze Account Processing Queue:

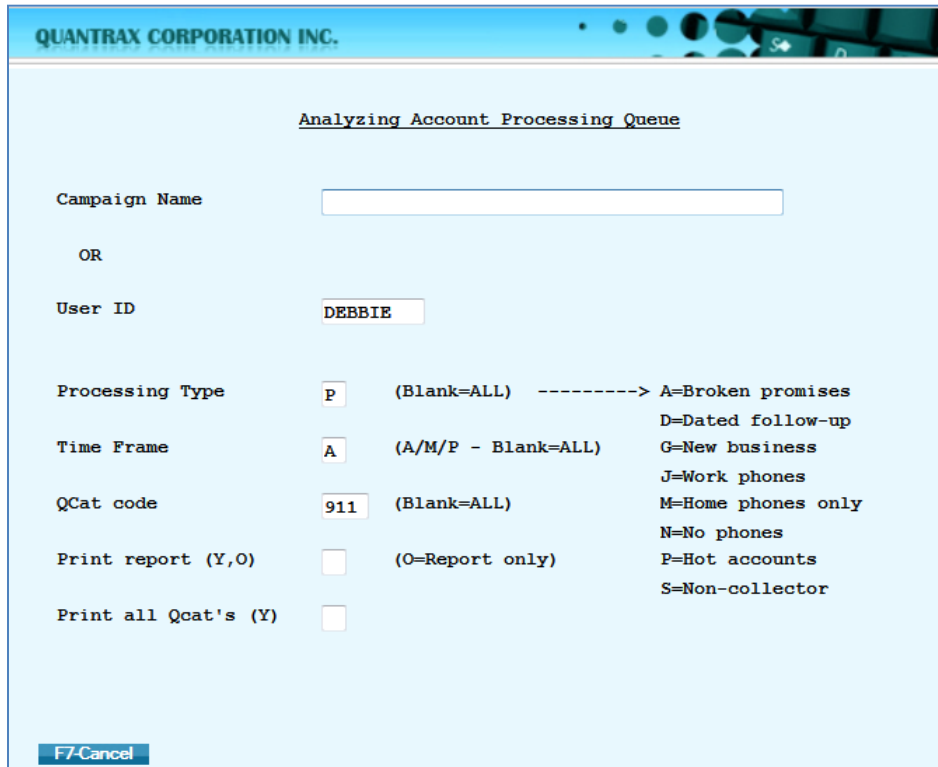
1. From the *RMEEx Main Menu* select **Management menu**, then select **Smart Code/User audit options** and then select **Audit a user (to be worked)**
2. From the *Audit A User (Accounts to be worked)* screen, type a *User Id* and press **F10** for **Work map analysis**



- From the *Work Map Analysis* screen, type **1** under *Opt.* column to select the queue to be analyzed and go to the *Analyzing Account Processing Queue* screen



- From the *Analyzing Account Processing Queue*, select the information for your analysis then press **Enter** to proceed



**EXAMPLE:** This is the summarized *Analysis of Account Processing Queue for User Id = DEBBIE*

**QUANTRAX CORPORATION INC.**

Analyzing Account Processing Queue

User	DEBBIE	Process P	TF 911	QCat A	Totals	Percentage	% with no Cont.
1.	Number of debtors				9		
2.	Number of open cases				10		
3.	Average per debtor				1		
4.	Total balance of open cases				100554.90		
5.	Average per debtor				10055.49		
6.	Debtors with legal accounts and %				0	0	
7.	Number with home phone and %				9	100	88
8.	Number with work phone and %				4	44	100
9.	Number with cell phone and %				3	33	100
10.	Number with an additional phone and %				1	11	100
11.	Number and % with a RPC				0	0	
12.	Number and % with a positive contact				0	0	
13.	Number and % with a prior payment				2	22	
14.	Number and % with no contact, no attempt				0	0	
15.	Recovery % for all cases within batch						0
16.	Unit yield for the batch						

**NOTE:** The numbers in the analysis represent the following information:

- **Average per debtor** = Total Payments divided by Total Balance of Open Cases
- **Unit Yield** = Commission divided by Number of Accounts
- **Recovery %** = Total Placements divided by Total Payments.
- *Percentages* will be rounded either up or down  
**EXAMPLE:** 1.1% will be displayed as 1% and 7.7% will be displayed as 8%

## Change Company in the Payment Entry Screen

In RMEEx GUI version 3.0 you can change the company in the *Payment Entry Screen*.

### To change the Company in the Payment Entry Screen:

1. From RMEEx *Main Menu*, select **Payment transaction menu**
2. Select **Debtor/Agency entry**
3. Type the *Batch number*
4. Select if a receipt is required for each transactions and enter *the Number of copies*
5. Type *Company Code* to desired company (the Company Name will display)
6. Continue adding other payment data and press **Enter** to save

The screenshot shows the 'Debtor/Agency Payment Transaction Entry' screen in the RMEEx application. The 'Company Code' field is highlighted with a red box and contains the value '99'. The 'Company name' is 'U Owe Us Collections'. Other fields include 'Payment date' (051012), 'Amount' (.00), and various checkboxes for 'Receipt required', 'Credit to Collector', etc. A function key menu is visible at the bottom.

## Multi- part Account Processing during the Nightly

This significant feature speeds up the *Nightly Process* by allowing *Account Processing* to run effectively in multiple simultaneous jobs. This minimizes the time spent on completing the *Nightly* process. The system allows this process to run conveniently in 3, 4 or 5 parts according to your needs.

### To Use Multi-part Account Processing:

**WARNING:** It is advised to contact Quantrax before setting up the *Multi-part Account Processing* option

1. From the RMEEx *Main Menu* select System control menu, then select **System Parameters**

- From *System Parameters*, press **ENTER** for **More Information** (next screen)

**RME X** QUANTRAX CORPORATION INC.

System Parameters

Company name 2 Owe Us Collections

PLACEMENT INFORMATION  
 Account sequence 1636846  
 Default contact series 01 Default collector CL  
 Julian date for case# (Y)  Call recording on (Y,N,b)

OTHER INFORMATION  
 House collector 01  
 Warning description codes 91 DP AT Z8 PP BK IQ     
 Stop cred.reporting codes     Hot accounts HA      
 Auto-dialler installed (Y) Y Separate paying Accts. (Y)   
 Stop dialler codes HI       No linking    
 Use home and work phone for checking (Y) (Def.is Home)  No Pri.change    
 Warn payment entry P1 P2 P3 P4 P5  
 "Account viewed" note (N)  Stop "Other links" message (Y)   
 Next weekend is QCat for weekend action 716  
 Current period is (Mth/Yr) 12 11 Omit comm% from coll.screens (Y) Y  
 New business option (Y,0,1,2,3) 0 Sp.logic for prop.assignment (Y) Y  
 Combine time-frames (Y)  Special tracking for changes (YV) Y  
 Stop system-generated QCATs (Y)   
 Pmt.Arrangements by Case# (Y) Y

F7-Exit ENTER-More information

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- From the page two *System Parameters* screen, in the field **Run account processing in 3, 4, or 5 parts** type **1, 2 or 3**

**RME X** QUANTRAX CORPORATION INC.

System Parameters

Company name 2 Owe Us Collections

Add standard note immediately if no note by user (Y) Y  
 Bypass minimum for proportionate payment distribution (Y) Y  
 Create processing types for "Cell" and "Other phones only" (Y)   
 Get missing area codes using state and prefix (Y)   
 Run linking during the day (Y)   
**Run account processing in 3,4 or 5 parts (Enter 1,2 or 3) 1**  
 Primary balance search for collectors (N=No) 1

WARNING - Please contact Quantrax before setting up multi-part account processing option!

F7-Exit

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## Account Linking through Posting

This feature available in RMEEx 3.0 gives you the ability to link accounts when posting accounts into the system. By allowing part of the linking process to run during day, this option enables the *Nightly Process* run faster by reducing the time taken for account linking.



Click icon to listen to why you should use *Account Linking through Posting!*

### To Use Account Linking through Posting:

1. From *RMEEx Main Menu* select **System control menu**, then select **System Parameters**
2. From the *System Parameters* screen, press **ENTER** for **More (Information next screen)**

2. From the page two *System Parameters* screen, in the field **Run linking during the day (Y)**, type Y to allow the system to link accounts at the time of posting

## New Selection Options for the Analysis of Pending Payments

RMEEx 3.0 introduces two new features the *Analysis of Pending Payments* option. These new features allow users to view a summary of the *total number of accounts*, the *total payments due* and *potential commission due* for a particular date range. There is also the ability to select the data by *Client codes* and *if client is a group*.

### To access Analysis of Pending Payments:

1. From the *RMEEx Main Menu* select the **Payment transaction menu**, next select **Payment reports for period**
2. From *Payment reports for period* select **Analysis of pending payments**
3. From the *Analysis of Pending Payments* screen, type in a *date range*
4. Type in up to four **Collector codes** (optional)
5. Type in up to four **Client codes** (optional)
 

**NOTE:** If a *Client code* is entered, only the payments due for that particular client within the specified date range will be shown (Blank equals ALL clients)
6. In the field *If client is group (Y)*, type **Y** if the client(s) selected is a group client
7. Press **ENTER** when done



**EXAMPLE:** Below is a summary report of *Payments due for date range 07/25/12 to 08/25/12*

**NOTE:** The numbers in the analysis represent the following information:

- **Amount scheduled** = total amount due from each payment type/method
- **Potential fees** = the possible commission that can be obtained from the total due amount

	Number of Accounts	Amount scheduled	Potential fees
1. Standard P/A	1	35.00	10.50
2. Non-Linear P/A	1	1,500.00	270.00
3. Standard P/A with CC	0	.00	.00
4. Non-Linear P/A with CC	0	.00	.00
5. Post-dates	6	77.00	18.90
6. Credit Card Series	1	10,000.00	2,000.00
<b>Totals</b>	<b>9</b>	<b>11,612.00</b>	<b>2,299.40</b>
Number of active P/A's	99	Credit cards to be	
Number of credit card series	2	processed today	1.00
Number of direct check accounts	11		

F7-Cancel

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- The Payments Pending Report can be compared viewing the detailed description through a spooled file by going to the command line and typing **wrkspflf** and press **ENTER**
- To select the report, in **Opt** type **5** in then press **ENTER** to view the detailed description

Work with Printer Output

User . . . . . CHAMEE Name, \*ALL, F4 for list System: S10E9B6C

Type options below, then press Enter. To work with printers, press F22.

2=Change 3=Hold 4=Delete 5=Display 6=Release 7=Message  
 9=Work with printing status 10=Start printing 11=Restart printing

Printer/	Output	Status
Opt	PRT01	
5	INQPERP	Printer stopped (use Opt 10)

Bottom

F1=Help F3=Exit F5=Refresh F11=Dates/pages/forms F12=Cancel  
 F14=Select other printer output F20=Include system output F24=More keys

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## Prevent Fishing in Account Inquiry Screen

A new security option to prevent “fishing” has been added for the *Account Inquiry > Primary balance*. It stops collectors from using this Primary balance option to fish" for high balance accounts.

To control which users are allowed to use *Account Inquiry > Primary balance*:

- The user must be set up as a collector
- The user cannot have a **Y** in the *close accounts field*

**NOTE:** If the user **does not** have access to use the option, they will be presented with the message: SC-9017 This option has been disabled for you

## Intelligent Call Monitoring

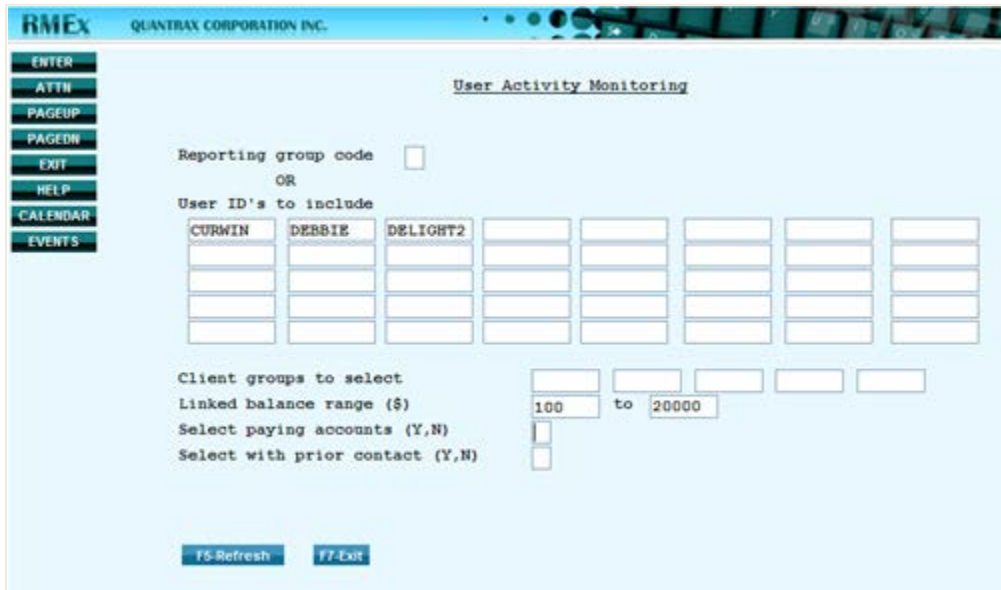
This new option allows managers to monitor calls of a group of collectors either by *Reporting Group Code* or *User IDs*, based on client and linked balance range. When the account information is displayed on the screen the collector’s extension is also shown.

### To Run Intelligent Call Monitoring:

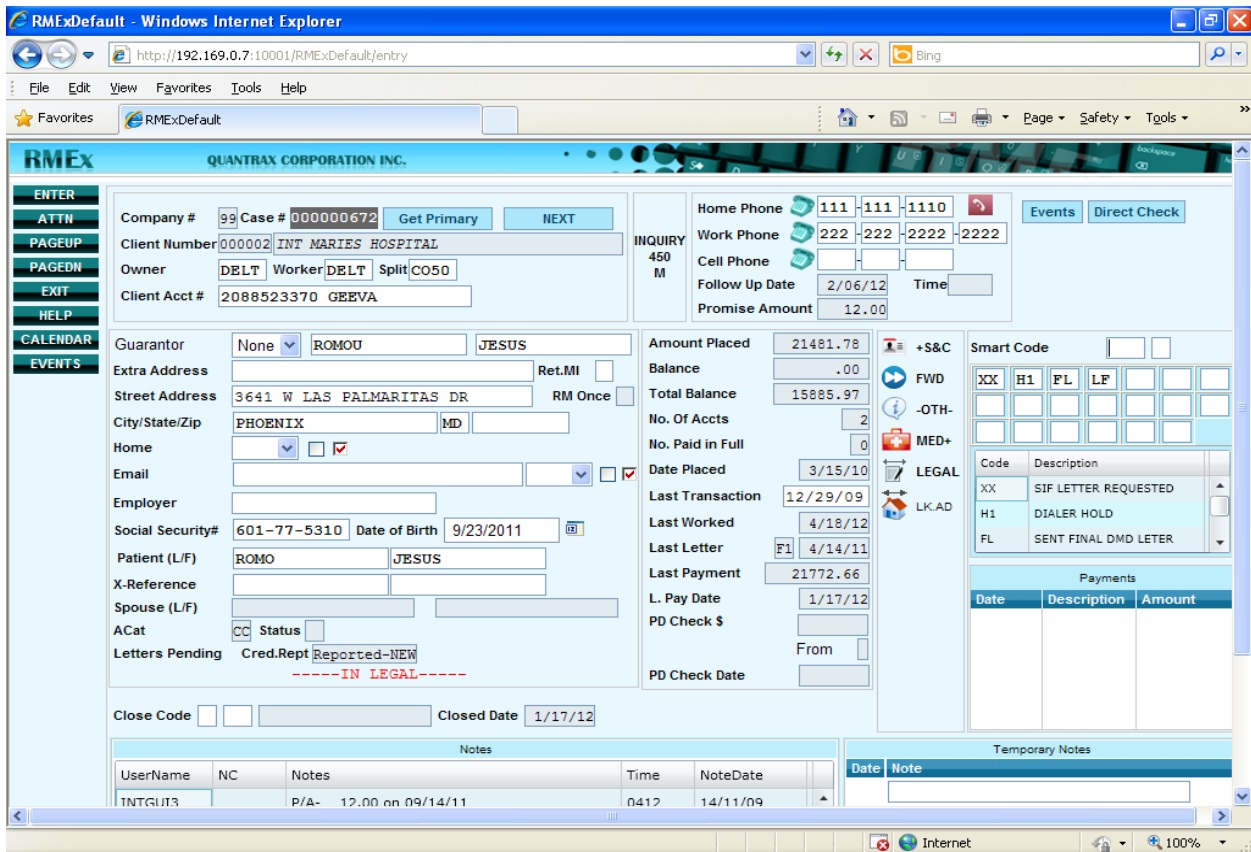
1. From the **RMEx Main Menu** select
2. From the *User Activity Monitoring* screen type the *Reporting Group Code* or *User IDs*

**NOTE:** Users assigned to a *Reporting Group* can be found under Collector Set Up

- Fill-in other necessary details such as *Client Group*, *Linked balance range* and other options on the screen

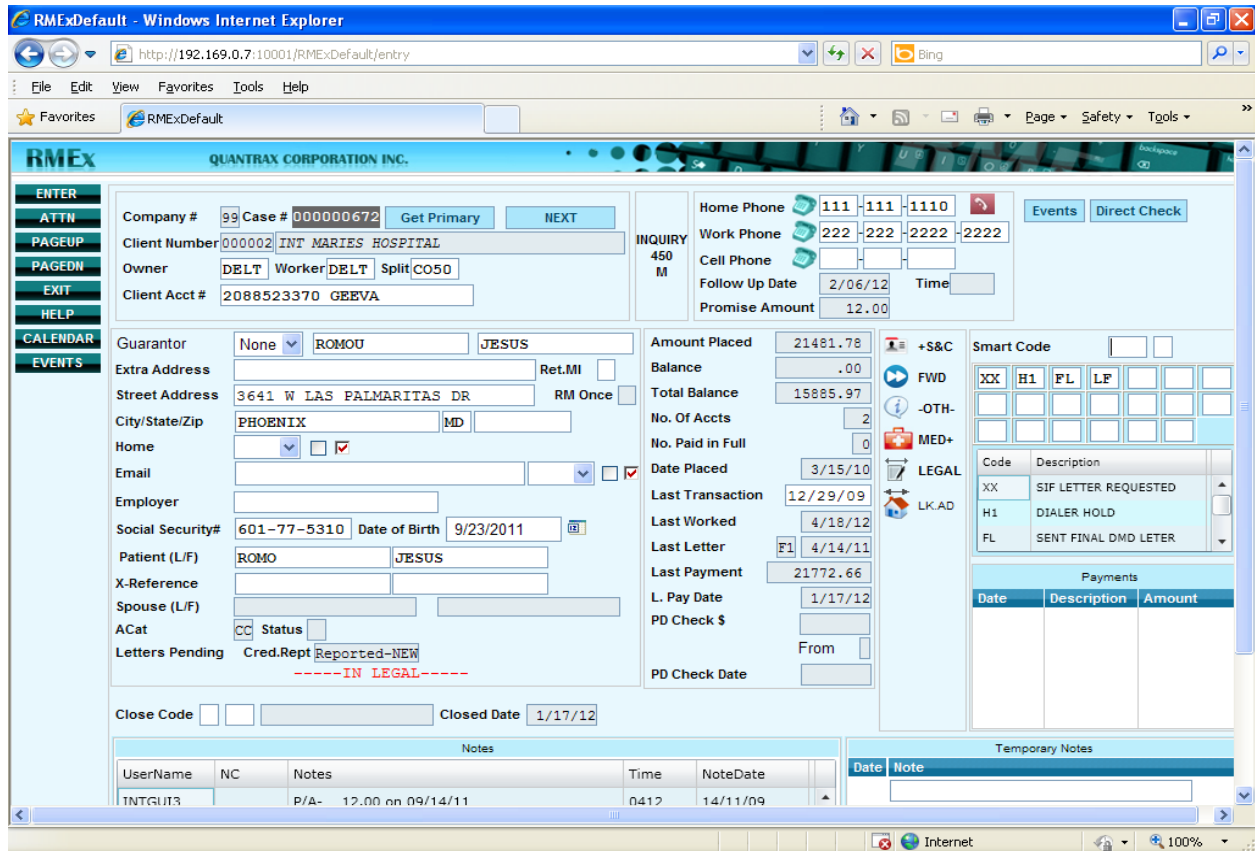


- Press **ENTER** to display first open account for the ID(s) requested (according to the sequence that was typed into the screen)



- Press **F7** while viewing the account to listen to the call **using the dialer** as it displays the extension (press F7) on which the collector is connected.

**NOTE:** When the collector ends the call and exits the account it will search for the next open account





## Collector Operations Changes

### Debtor Authentication

In RMEEx GUI version 3.0, the new **Debtor Authentication** feature reduces the risk of identity theft and fraud of the debtor’s personal information. When a collector makes calls and inquires, the receiver of the call may pretend to be the debtor and can find out their personal information. This can lead to violation issues.

**Debtor Authentication** has up to seven options to validate the debtor’s identity. The collector must enter the correct debtor information before they are presented with the account details. Authentication options are setup on the client level. The Authentication options are as follows:

- Full SSN
- Last 4 digits of the SSN
- Full DOB
- Month and Date of the DOB
- Address
- Client account number
- Last 4 digits of the Client account number

Related authentication options are coupled into *sets*. Options in the same set are considered a single option. For example, *Full SSN* and *Last 4 of SSN* are considered one option. Enter **Y** (Need to authenticate) or **S** (Single option to authenticate).

If an option is selected with the value **S**, when that question is answered correctly the system will not need to verify other **Debtor Authentication** questions.



Click icon to listen to examples of how **Debtor Authentication** works!

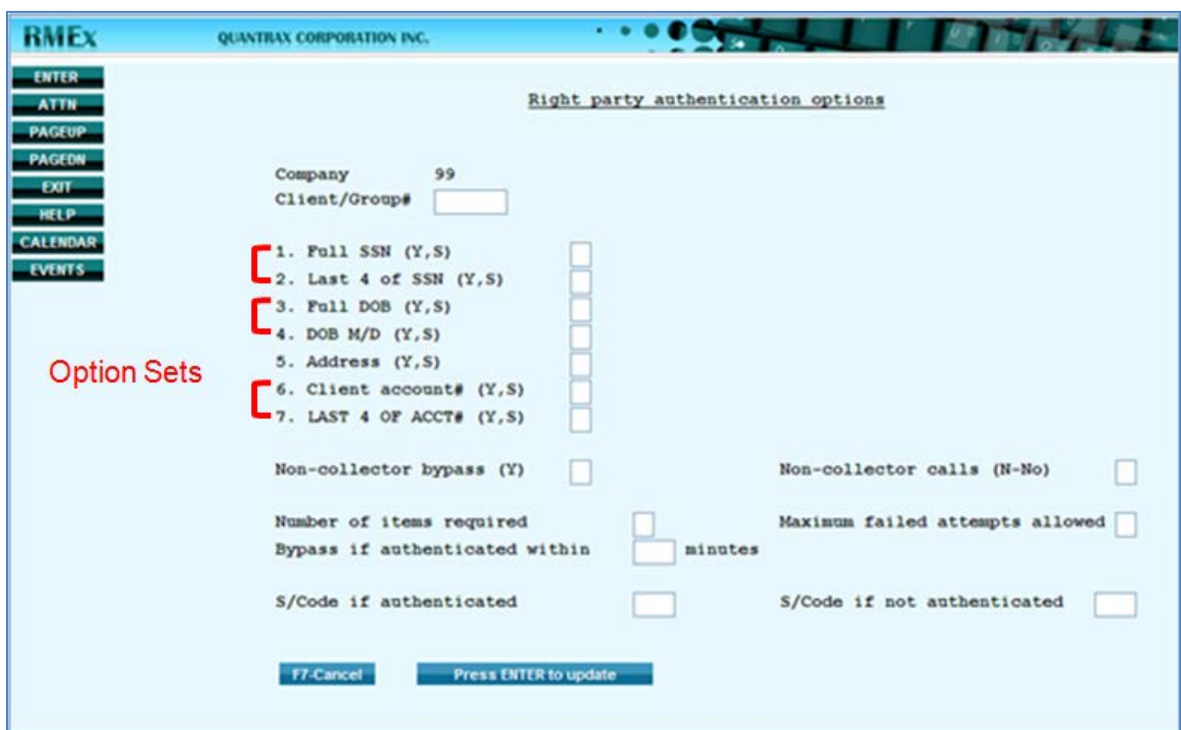
Other Authentication Options	Description
<b>Non-collector bypass (Y)</b>	Prevents displaying the authentication screen to a non-collector enter a <b>Y</b> in this field.  <b>EXAMPLE:</b> If a <b>Y</b> is entered in this field a manager <u>does not</u> have to authenticate before viewing the debtor's information.
<b>Non-collector calls (N-No)</b>	Prevents non-collectors calling the debtor enter <b>N</b> in this field.
<b>Number of items required</b>	Sets the maximum number of options required to authenticate.  <b>EXAMPLE:</b> If all the six items are selected and a collector needs to authenticate only four enter <b>4</b> in this field.
<b>Bypass if authenticated within minutes</b>	Suspends authentication of a debtor within a certain time frame, enter the time period in minutes.  <b>EXAMPLE:</b> If 10 minutes is entered in this field and a collector authenticates the debtor at 9:00 A.M. the next time you have to authenticate the debtor will be at 9:10 A.M. This can be used if a call is disconnected or the debtor wants you to call back after 5 minutes.
<b>Maximum failed attempts allowed</b>	Sets the number of times a collector can fail to authenticate the debtor before attempts are suspended.
<b>S/Code if authenticated</b>	Configures the system to automatically apply a predefined Smart Code for <u>authenticated accounts</u> when presenting the account detail screen to the collector.
<b>S/Code if not authenticated</b>	Configures the system to automatically apply a predefined Smart Code saying "Failed to authenticate the debtor" <u>for not authenticated accounts</u> within the <i>Maximum failed attempts allowed</i> .

To setup authentication options:

- From Main Menu select **System Control** menu , next select **System Security** and then select **Right party authentication options**  
The *Right party authentication options* screen displays
- Press **F6** to **Add** a new client or in *Opt* column type **2** to **Edit** client information



- Add/modify the debtor authentication options, then press **ENTER** to update  
**NOTE:** Use **Y** (Need to authenticate) or **S** (Single option to authenticate)



The system will automatically present the following screen to the collector to verify the debtor's information.

**RMEEx** QUANTRAX CORPORATION INC.

**ENTER**  
**ATTN**  
**PAGEUP**  
**PAGEDN**  
**EXIT**  
**HELP**  
**CALENDAR**  
**EVENTS**

Right party authentication

Guarantor BHAGYA RODRIGO Case number 001480304 - 99

\* SSN [ ]

DOB (MD) [ ]

Cl.Acct# [ ]

Street address 125 SOUTHERN LAKE AVE Confirm (Y)   
 City/State/Zip ALPES MD 68655

The client requires that the consumer is authenticated with at least 2 item(s) prior to viewing or discussing account information. Items marked with an \* indicate single items that can be used to authenticate a consumer.

**F7-Cancel** **Press ENTER to update**

**EXAMPLE 1:** In the screen below, if the *Full SSN* is verified the system will ignore the DOB and Address options and the *Account Detail* will be presented to the collector.

**RMEEx** QUANTRAX CORPORATION INC.

**ENTER**  
**ATTN**  
**PAGEUP**  
**PAGEDN**  
**EXIT**  
**HELP**  
**CALENDAR**  
**EVENTS**

Right party authentication options

Company 99  
 Client/Group# 000014

1. Full SSN (Y,S) [S]  
 2. Last 4 of SSN (Y,S) [ ]  
 3. Full DOB (Y,S) [Y]  
 4. DOB M/D (Y,S) [ ]  
 5. Address (Y,S) [Y]  
 6. Client account# (Y,S) [ ]  
 7. LAST 4 OF ACCT# (Y,S) [ ]

Non-collector bypass (Y) [Y] Non-collector calls (N-No) [N]

Number of items required [2] Maximum failed attempts allowed [2]  
 Bypass if authenticated within [15] minutes

S/Code if authenticated [ ] S/Code if not authenticated [ ]

**F7-Cancel** **Press ENTER to update**



**EXAMPLE 2:** In the screen below, six options have been selected but only two options from different option sets need to be authenticated.

**RME X** QUANTRAX CORPORATION INC.

**Right party authentication options**

Company 99  
 Client/Group# 000014

1. Full SSN (Y,S)  Y  
 2. Last 4 of SSN (Y,S)  Y  
 3. Full DOB (Y,S)  Y  
 4. DOB M/D (Y,S)  Y  
 5. Address (Y,S)   
 6. Client account# (Y,S)  Y  
 7. LAST 4 OF ACCT# (Y,S)  Y

Non-collector bypass (Y)  Y Non-collector calls (N-No)  N

Number of items required 2 Maximum failed attempts allowed 2  
 Bypass if authenticated within 15 minutes

S/Code if authenticated  S/Code if not authenticated

F7-Cancel Press ENTER to update

**To authenticate debtor information (collector):**

1. When collectors try to access the account (Account Inquiry screen), if Debtor Authentication is configured for client the following screen displays

**RME X** QUANTRAX CORPORATION INC.

**Right party authentication**

Guarantor BEAGYA RODRIGO Case number 001480304 - 99

\* SSN

DOB (MD)

Cl.Acct#

Street address 125 SOUTHERN LAKE AVE Confirm (Y)   
 City/State/Zip ALPES MD 68655

The client requires that the consumer is authenticated with at least 2 item(s) prior to viewing or discussing account information. Items marked with an \* indicate single items that can be used to authenticate a consumer.

F7-Cancel Press ENTER to update

2. Verify the information with the debtor and type it in the screen then press **ENTER** to go to the *Account Detail Screen*

**NOTE:** When incorrect information details are entered, the message *Authentication failed* displays

The screenshot shows the RMEEx interface for QUANTRAX CORPORATION INC. The screen title is "Right party authentication". The guarantor is BHAGYA RODRIGO, and the case number is 001480304 - 99. The SSN field contains "456569654" and is marked with a red "X". The DOB (MD) field is empty. The Cl.Acct# field is empty. The street address is 125 SOUTHERN LAKE AVE, ALPES MD 68655. The confirm (Y) checkbox is unchecked. A message at the bottom states: "The client requires that the consumer is authenticated with at least 2 item(s) prior to viewing or discussing account information. Items marked with an \* indicate single items that can be used to authenticate a consumer." Below this, a red box highlights the message "Authentication failed". At the bottom, there are buttons for "F7-Cancel" and "Press ENTER to update".

**NOTE:** When the maximum failed attempts allowed has been reached, the message *Maximum attempts for authentication* displays

The screenshot shows the RMEEx interface for QUANTRAX CORPORATION INC. The screen title is "Right party authentication". The guarantor is BHAGYA RODRIGO, and the case number is 001480304 - 99. The SSN field is empty and marked with a red "X". The DOB (MD) field contains "0508" and is marked with "OR". The Cl.Acct# field contains "46848" and is marked with a red "X". The street address is 125 SOUTHERN LAKE AVE, ALPES MD 68655. The confirm (Y) checkbox is unchecked. A message at the bottom states: "The client requires that the consumer is authenticated with at least 2 item(s) prior to viewing or discussing account information. Items marked with an \* indicate single items that can be used to authenticate a consumer." Below this, a red box highlights the message "Maximum attempts for authentication have been reached". At the bottom, there are buttons for "F7-Cancel" and "Press ENTER to update".

**To find out if authentication failed on an account:**

1. Check the *Audit Notes* in the *Account Detail* screen press **F11**
2. Press **F10**

PROG	DATE	TIME	USERID	S/C	NOTES/ACTION
03/21/12	04:35	04:36	CHA		Account Viewed from 04:35
03/21/12	04:37	04:37	CHA		Account Viewed from 04:37
03/21/12	04:38	04:38	CHA		Account Viewed from 04:38
03/21/12	04:39	04:39	CHA		Account Viewed from 04:39
03/21/12	04:55	04:56	CHA		Account Viewed from 04:55
03/21/12	04:58	04:59	CHA		Account Viewed from 04:58
03/21/12	05:01	05:19	CHA		Account Viewed from 05:01
03/21/12	06:31	07:05	CHA		Account Viewed from 06:31
03/22/12	00:51	00:51	CHA		Account Viewed from 00:51
04/19/12		00:04	CHA		Authenticated
04/19/12		00:04	CHA		DOB-4 ADDR
04/19/12		00:05	CHA		Account Viewed from 00:01
04/19/12		00:05	CHA		Authenticated
04/19/12		00:05	CHA		DOB-4 ADDR
04/19/12		00:11	CHA		Authentication failed
04/19/12		00:11	CHA		SSN DOB-4 ADDR ACCT
04/19/12		00:18	CHA		Authentication failed
04/19/12		00:18	CHA		SSN DOB-4 ADDR ACCT
04/19/12		00:18	CHA		Max attempts for auth
04/19/12		01:35	CHA		Account Viewed from 00:10

ACCOUNT PROCESSING

User ID NONE

Type

QCat

T/Frame

Recall NONE

Worked?

I-Tel Q

Ori.Type

Page Up Page Down Acct. Details F7-Exit F10-Multiples F24-Last notes

**Account Inquiry Search - By Phone Number**

In RMEx GUI 3.0, from the *Account Inquiry* screen you can search by all phone numbers; both “good” and “bad” work and home phone numbers. In the *Inquiry Account* search results screen, good numbers are notated with capital letters (H for home) and bad numbers are notated with small case letters (h for home). This feature works for both work and home phone numbers.

**To search for ALL phone numbers from the Account Inquiry screen:**

1. From the *Main Menu*, select **Inquiry Menu**, select **Account inquiry** screen
2. For *Search type* enter **08** for **Phone Numbers**
3. For *Search data* enter the home or work **phone number** followed by **X (4656465896x)** then press **Enter**

**Account Inquiry**

Company name  Ove Us Collections

Search Type	Search Data
1 - Case number	a) Case#
2 - Name	Last name
3 - Client account number	b) First name
4 - Social security number	Account#
5 - Street address	Soc.sec# (or last 4)
6 - Home phone number	Street address
7 - Place of employment	Home ph# (xxxxxxxx)
8 - Phone numbers	POE
9 - Primary balance	Phone# (xxxxxxxx)
10 - Case number with company	Primary balance
11 - Guarantor name	Company and case#
12,13,14,15 - Multi-company search	Last name
	Guar.name, Cl.Acct#, Address, Home Ph

Search: Company code  99

Search type:  08

Search data: a)  465465896X b)

Only open (Y)  (Name search)

12,13,14,15-Guar.name, Cl.acct#, Address, Home#

Most recently accessed accounts:

- 99-001480305 TANIYA
- 99-001480304 BHAGYA
- 99-001480303 TANIYA
- 99-000001750 JACKO
- 99-000908057 GEORGE

F3-Sounds like F9-Purge F12-Multiple Accts F20-Recalls F24-Num.ClAcct#

**Example 1:** If a unique phone number was entered, the *Account Detail* screen will display for the phone number searched, as shown below.

**Account Detail**

Company #  99 Case #  001480303 Get Primary NEXT

Client Number  000014 ISM HOSPITAL

Owner  ISBA Worker  ISBA Split

Client Acct #

Home Phone  465-465-8966

Work Phone  454-565-6565

Cell Phone

Follow Up Date

Promise Amount

Guarantor  None  TANIYA  PERERA

Extra Address

Street Address  12 SOUTHERN AVE

City/State/Zip  CALIFORNIA  MD 68646

Home

Email

Employer

Social Security#  456-46-4562 Date of Birth  5/05/1982

Patient (L/F)  TANIYA  PERERA

X-Reference

Spouse (L/F)

ACat  Status

Letters Pending  Cred.Rept  Do not Report

Amount Placed  500.00

Balance  565.61

Total Balance  565.61

No. Of Accts  1

No. Paid in Full  0

Date Placed  3/21/12

Last Transaction  1/01/11

Last Worked

Last Letter

Last Payment  .00

L. Pay Date

PD Check \$

PD Check Date

Smart Code

Payments

Date	Description	Amount

Notes

UserName	NC	Notes	Time	NoteDate
CHAMFF	9X	Call Ph - 000-0000	0624	21/12/03

Temporary Notes

Date  Note

**Example 2:** If the phone number you searched for is a “bad” number), the *Account Inquiry* results screen displays. Select the line number to view the account.

**NOTE:** *The same number may be listed in several accounts and categorized as “good” and “bad”.*  
 (1234785965H, 1234785965h)

ENTER		QUANTRAX CORPORATION INC.					
ATTN		<b>Account Inquiry</b>					
1	TANIYA	PERERA	456-46-4562	123-478-5965h	ISHA-ISHA	001480303	
	12 SOUTHERN AVE	CALIFORNIA		MD 68646			
	03/21/12	P- 500.00	B- 565.61	PNW HOSPITAL	99	1234785965	
2	BHAGYA	RODRIGO	456-46-9654	123-478-5965H	ISHA-ISHA	001480304	
	125 SOUTHERN LAKE AVE	ALPES		MD 68655	46868		
	03/21/12	P- 600.00	B- 668.54	PNW HOSPITAL	99	1234785965	
3	GURANTORTTREE N	GURANTOR FIRSTM	888-77-5558	123-496-7890w	-	00000500	
	STREETTESTTREEBB1111	ALANWOODTSETRE		TT TESTTRE	60487TESTTREE995QA111111Q		
	03/11/10	P- 2111.35	B- 1092.37	INT MARIES HOSPITAL	99	1234967890	
4	BEVIL	SARAH	601-34-9995	123-496-7890w	DELT-DELT	000001668	
	3901 Dunraven Rd	Richmond		VA 23236	2068292321		
	03/15/10	P- 374.68	B- 377.45	INT MARIES HOSPITAL	99	1234967890	
5	NURSE	NAGA		123-496-7890w	GUI-GUI	000015028	
	123 EPP LONGVIEW	LONGVIEW		WA 98632	150055310869		
	01/08/10	P- 500.00	B- 515.16	INT MARIES HOSPITAL	99	1234967890	

Select line number

F1-New selection   F3-Sounds like   F7-Exit   F9-Purge inquiry   F20-Recalls

### New Search Type - By Email Address

In RMEEx GUI 3.0, from the *Account Inquiry* screen you can search by email address.

#### To search by email address from the Account Inquiry screen:

1. From the *Main Menu*, select **Inquiry Menu**, select **Account inquiry** screen
2. For *Search type* enter **02** for **Name**
3. For *Search data* enter the **email address** (janedoe@gmail.com) and then press **Enter**

**Example 1:** Search using the “full” email address.

**RME X** QUANTRAX CORPORATION INC.

**Account Inquiry**

Company name: Owe Us Collections

Search Type	Search Data
1 - Case number	a) Case#
2 - Name	Last name
3 - Client account number	Account#
4 - Social security number	Soc.sec# (or last 4)
5 - Street address	Street address
6 - Home phone number	Home ph# (xxxxxxxx)
7 - Place of employment	PDE
8 - Phone numbers	Phone# (xxxxxxxx)
9 - Primary balance	Primary balance
10 - Case number with company	Company and case#
11 - Guarantor name	Last name
12,13,14,15 - Multi-company search	Guar.Name, Cl.Acct#, Address, Home Ph

Search: Company code: 99, Search type: 02, Search data: a) DUBJ@GMAIL.COM, b) [ ]

Most recently accessed accounts:

- 99-001480726 DARDEN
- 99-000908021 MARY
- 99-001480305 TANIYA
- 99-001480304 BHAGYA
- 99-001480303 TANIYA

F3-Sounds like F9-Purge F12-Multiple Accts F20-Recalls F24-Num.Cl.Acct#

**Example 2:** Search using any part of the email address.

**NOTE:** You must type in @ with any part of the email address you are searching for (such as STEVE.EL@).

**RME X** QUANTRAX CORPORATION INC.

**Account Inquiry**

Company name: Owe Us Collections

Search Type	Search Data
1 - Case number	a) Case#
2 - Name	Last name
3 - Client account number	Account#
4 - Social security number	Soc.sec# (or last 4)
5 - Street address	Street address
6 - Home phone number	Home ph# (xxxxxxxx)
7 - Place of employment	PDE
8 - Phone numbers	Phone# (xxxxxxxx)
9 - Primary balance	Primary balance
10 - Case number with company	Company and case#
11 - Guarantor name	Last name
12,13,14,15 - Multi-company search	Guar.Name, Cl.Acct#, Address, Home Ph

Search: Company code: 99, Search type: 02, Search data: a) STEVE.EL@, b) [ ]

Most recently accessed accounts:

- 99-000962957 ELKINS
- 99-000862275 CASHION
- 99-001480726 DARDEN
- 99-000908021 MARY
- 99-001480305 TANIYA

F3-Sounds like F9-Purge F12-Multiple Accts F20-Recalls F24-Num.Cl.Acct#

- From the *Account Inquiry* results screen, click on the **line number** to view the account



### New search type - By the social security # of patient, spouse, co-signer or multiple co-signers

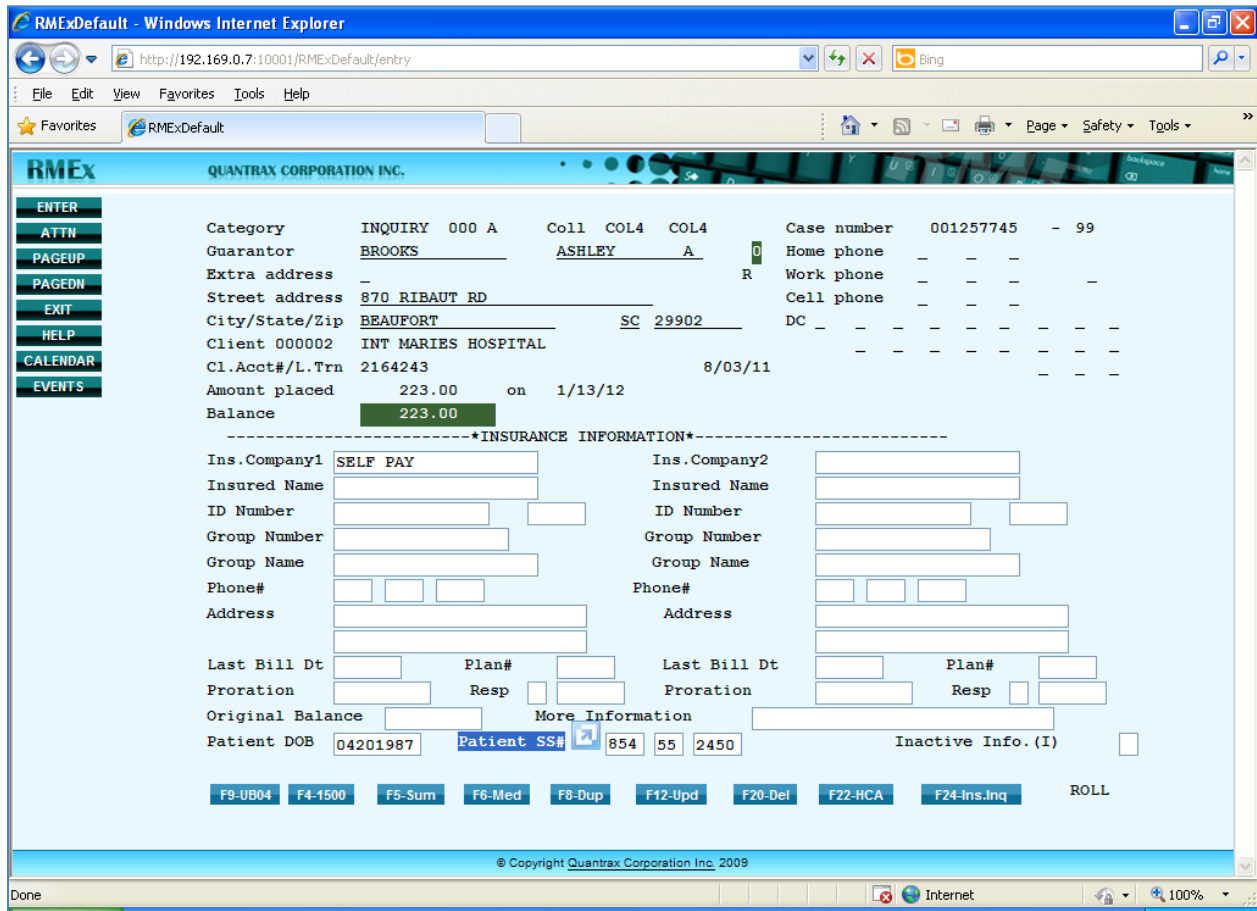
In RMEEx GUI 3.0, from the *Account Inquiry* screen you can the social security # of patient, spouse, co-signer or multiple co-signers.

To search by the social security # of patient, spouse, co-signer or multiple co-signer:

- From the *Main Menu*, select **Inquiry Menu**, select **Account inquiry** screen
- For *Search type* enter **04** for **Social security number**
- For *Search data* enter the social security # X and press **ENTER (854552450X)**



- The account that contains the SSN you searched for will display  
**NOTE:** It could be SSN of patient, spouse, co-signer or multiple co-signer



## Use Court Case Numbers to Search and Analyze Accounts

In RMEEx GUI version 3.0, you can search legal accounts by court case number and analyze linked accounts', Summary by Docket#, Balance Type, Worker Code and QCat Codes.

**To search for an account by court case number (docket number):**

- From the *Main Menu*, select **Inquiry Menu**, select **Account inquiry** screen
- For *Search type* enter **01** for **Case number**
- For *Search data* enter **CC** followed by **your court case number** (CC8896515100)



**RME X QUANTRAX CORPORATION INC.**

**Account Inquiry**

Company name  Owe Us Collections

Search Type	Search Data
1 - Case number	a) Case# b)
2 - Name	Last name First name
3 - Client account number	Account# Account# (Contd)
4 - Social security number	Soc.sec# (or last 4)
5 - Street address	Street address Address (Contd)
6 - Home phone number	Home ph# (xxxxxxxxxx)
7 - Place of employment	POE
8 - Phone numbers	Phone# (xxxxxxxxxx)
9 - Primary balance	Primary balance
10 - Case number with company	Company and case#
11 - Guarantor name	Last name First name
12,13,14,15 - Multi-company search	Guar.Name, Cl.Acct#, Address, Home Ph

Search  Most recently accessed accounts

Company code  99

Search type  1

Search data a)  CC8896515100 b)

Only open (Y)  (Name search)

12,13,14,15-Guar.name, Cl.acct#, Address, Home#

Account#	Name	Address	Phone	Balance	Case#
99-001480228	JOSEPH				
99-001498212	DAVID				
99-000908057	GEORGE				
99-000908069	JOSEPH				
99-000904854	JOSEPH				

4. Press **Enter**

The account will display in the *Account Detail* screen if the court case number entered unique

**NOTE:** The *Account Search Result* screen will display if part of the case number was entered or if it is not a unique number. The court case numbers will display in the position that the *Client Account Number* appears in a normal case number search.

**QUANTRAX CORPORATION INC.**

**Account Inquiry**

Line	Name	Address	Phone	Balance	Case#
1	GEORGE	50 SHOE ROAD	(325) 458-4485		000908057
	SEENA	SAN DIEGO	NY 52632		8896515100
		08/19/11	INT MARIES HOSPITAL	P- 3000.00 B- 2600.00	99
2	PAINTER	681 ELLIOTT DR	402-41-3957		000956379
	MIKE	CINCINNATI	OH 45208		89754468
		12/04/11	INT MARIES HOSPITAL	P- 39510.00 B- 39510.00	99
3	HYATT	403 FLOYD HOLLOW RD	(423) 391-8876		001014407
	ROBERT CLAYTON	PINEY FLATS	TN 37686		24-24
		08/17/11	WELLMONT 450153	P- 1698.20 B- 1698.20	99

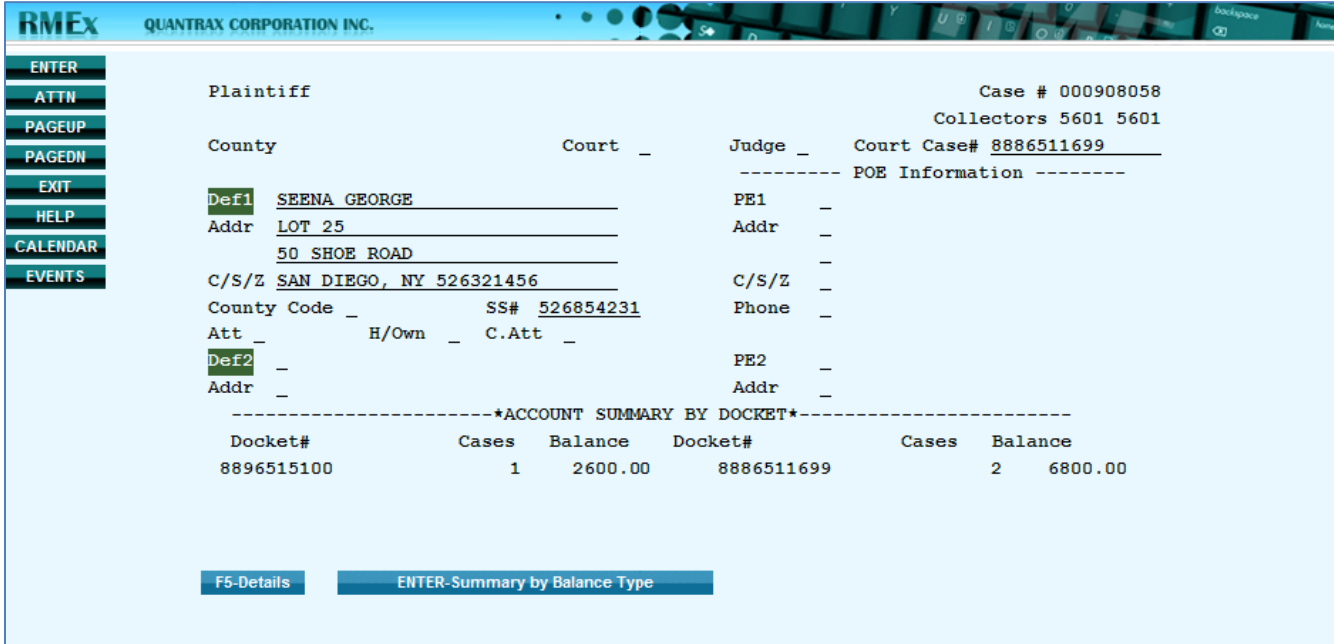
Select line number

### View Balance for Linked Accounts with Different Court Case Numbers

In RMEEx GUI version 3.0 you can view the total balance for linked accounts with different court case numbers via the *Full Legal* screen. Totals can also be viewed by balance types, worker and QCat. The screen is similar to the options from within the linked account summary.

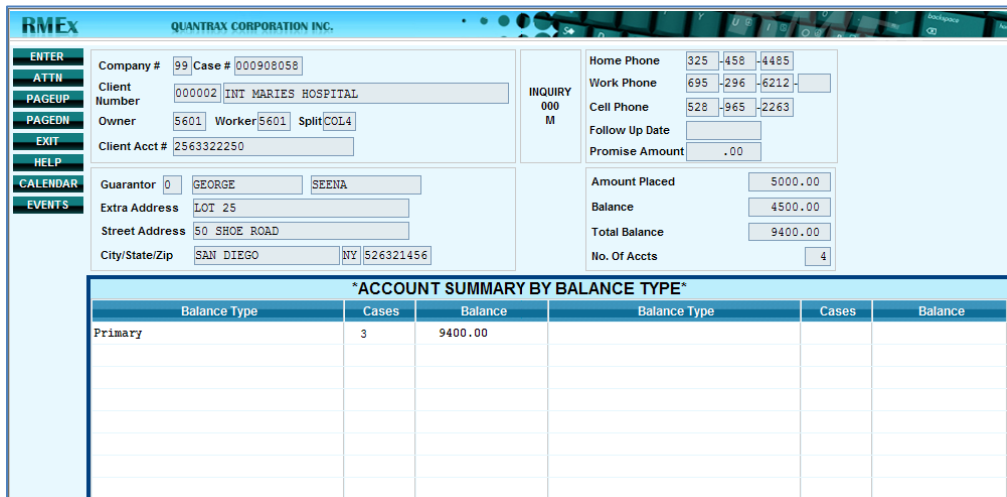
To view a balance for linked accounts with different court case numbers:

1. From the *Account Detail* screen, press **F6** for **Full Legal** screen then click **F5** for **Docket#**



2. Press **ENTER** to view totals by *balance type*, *worker* and *QCat* respectively.

### Account summary by Balance Type



Account summary by Worker Code

Worker	Cases	Balance	Worker	Cases	Balance
CO50	1	2600.00	5601	2	6800.00

Account summary by Qcat Codes

QCat	Cases	Balance	QCat	Cases	Balance
STANDARD	3	9400.00			

Legal Screen Enhancements

New options have been added to the **Update Legal Master Files** menu, **Full Legal Screen** and the addition of new fields within some of the screens. The enhancements are as follows:

- Additional fields in Defendant Attorney Codes
- Additional fields in Court Codes
- Additional fields in County Codes
- New options on Legal Master Files Menu
  - Judge Codes
  - Covering Attorney Codes
- Additional screens in Full Legal Screen
  - New Caption screen
  - New Suit Detail screen
  - New Garnishment screen

### Defendant Attorney Codes

The following new fields have been added to the Defendant Attorney Codes screen:

- Additional name
- Secretary name
- Phone
- Remarks
- E-Mail address

### To access the Defendant Attorney Codes screen:

3. From *Main Menu* select **Management menu** then select **Legal Files and Reports**
4. From *Legal Files and Reports*, select **Defendant Attorney Codes**
5. Type in information and press **ENTER** to save

Defendant Attorney Codes

Attorney code	COOVER
Name	CHIP COOVER
Additional name	
Address	1 MAIN ST
City/State/Zip	COLUMBIA, MD 20804
Phone	3015551212 Ext
Fax number	3016671111
E-Mail address	NEW EMAIL ADDRESS
Secretary name	NEW SECRETARY NAME
Remarks:	REMARK 1
	REMARK 2
	REMARK 3
	REMARK 4
Delete (D)	<input type="checkbox"/>

### Court Codes

The following new fields have been added to the Defendant Attorney Codes screen:

- Description (longer length)
- Courthouse Name
- Phone
- Extension

### To access the Court Codes screen:

1. From *Main Menu* select **Management menu** then select **Legal Files and Reports**
2. From *Legal Files and Reports*, select **Court Codes**
3. Type in information and press **ENTER** to save

Court Codes

Court code: AAAA  
 Description: ABCD COURT - IT IS DEFENETELY BIGGER LINEXX  
 Courthouse Name: NEW COURT HOUSE NAME FOR COURT  
 Clerk name:   
 Address: 123 MAIN   
 City/State/Zip:   
 Phone: 1231541414 Ext: 76151

Do not serve work  Allow multiple complaints  Sue one client only   
 Court cost-one  Court cost-multiple  Maximum allowed   
 Use attorney fee  Use court cost

Balance Attorney

	From	To	Fee \$	Fee %
1				
2				
3				
4				
5				
6				
7				
8				
9				

Delete (D)

F1-New Selection    F3-Search    F7-Exit

**County Codes**

The following new fields have been added to the Defendant Attorney Codes screen:

- Second person
- Phone
- Fax

**To access the County Codes screen:**

1. From *Main Menu* select **Management menu** then select **Legal Files and Reports**
2. From *Legal Files and Reports*, select **County Codes**
3. Type in information and press **ENTER** to save

County Codes

County code: 00000001  
 County: COUNTY 00000001  
 City: STATE DFDFFD  
 State: MD

Sheriff Name: WILLIAM STAUARAT PLLIUYOU  
 Second Person: THOMAS WILLIAM STOUWARD SECOND  
 Address: 87171 EEST ROAD  
 SIDE STORRY FOR  
 C/S/Z: BETHESDA, MD 209181  
 Phone: 3018272616 Ext. 71620  
 Fax#: 3018276122

Delete (D)

F1-New Selection    F3-Search    F7-Exit

### Judge Codes

A new option is available on the **Legal Master Files Menu** called **Judge Codes**. Use the **Judge Codes** screen to enter detailed information about the judge.

#### To access the Judge Codes screen:

1. From *Main Menu* select **Management menu** then select **Legal Files and Reports**
2. From *Legal Files and Reports*, select **Judge Codes**
3. Type in information and press **ENTER** to save

Judge Codes

Judge code      JJJ

Name           

Additional name  

Address          

City/State/Zip   

Phone                  Ext         Fax number  

Court Room                             Court Room Phone#  

E-Mail address   

Judicial Assistant Name         Phone#  

Judicial E-Mail address  

Remarks:       

Delete (D)

### Covering Attorney Codes

A new option is available on the Legal Master Files Menu called **Covering Attorney Codes**. Use the Covering Attorney Codes screen to enter detailed information about the covering attorney.

#### To access the Covering Attorney Codes screen:

1. From *Main Menu* select **Management menu** then select **Legal Files and Reports**
2. From *Legal Files and Reports*, select **Covering Attorney Codes**
3. Type in information and press **ENTER** to save

### Full Legal Screen Enhancements


Additional legal screens are available from the **Full Legal Screen** via the **Account Detail** screen. The new screens are:

- Caption Screen
- Suit Details Screen (by defendant)
- Garnishment Screen

**NOTE:** Only three defendants can be entered (Def1, Def2 and Def3)

There are 2 new files (one for Garnishments and for a second legal screen) stored at the defendant level (DEF1, DEF2 and DEF3)

For letters, there are a set of merge codes for data in each screen. For the Caption and Garnish screens, there are merge codes to indicate these items are for which defendant.

Click on the icon to view the list of merge codes for the **Full Legal** screen enhancements 

### To view the merge codes used for letters:

1. From *Main Menu* select **Letter Format menu** then select **Merge Codes**

### Caption Screen

Use the **Caption Screen** to notate the heading of a motion or other document filed with a court. It typically contains the names of the plaintiff(s) and the defendant(s), the name of the court, the assigned judge, and the case number.

### To access the Caption Screen:

1. From *Main Menu* select **Inquiry menu** then select **Account Inquiry** and bring up an account  
**NOTE:** You can also access **Account processing menu** then select **Account inquiry**
2. From the **Account Detail Screen** press **F6** for the **Full Legal** screen, then **F2** for the **Caption** screen
3. Type in information and press **F12** to update

\*Caption\* \* Def1 \* Case # 001480726

Cap1		Cap21	
Cap2		Cap22	
Cap3		Cap23	
Cap4		Cap24	
Cap5		Cap25	
Cap6		Cap26	
Cap7		Cap27	
Cap8		Cap28	
Cap9		Cap29	
Cap10		Cap30	
Cap11		Cap31	
Cap12		Cap32	
Cap13		Cap33	
Cap14		Cap34	
Cap15		Cap35	
Cap16		Cap36	
Cap17		Cap37	
Cap18		Cap38	
Cap19		Cap39	
Cap20		Cap40	

**F7-Exit** **F12-Update** Up/Down = change defendant

**Suit Detail Screen**

Use the **Suit Detail Screen** to enter detailed information about the law suit.

**To access the Suit Detail Screen:**

1. From *RME X Main Menu* select **Inquiry** menu then select **Account Inquiry** and bring up an account  
**NOTE:** You can also access **Account processing** menu then select **Account inquiry**
2. From the **Account Detail Screen** press **F6** for **Full Legal** screen then **F8** for the **Suit Detail** screen
3. Type in information and press **F12** to update /or go to view info for next defendant

\*Suit Detail\* \* Def1 \* Case # 001480304

----- Defendant Information -----				----- Attorney Information -----			
Name				Name			
Addr				Addr			
County Code		SS#		Ph#		Fax	
Att		H/Own	<input type="checkbox"/>	C.Att		Forwarded to Attorney date	
Suit Filed in Court Code		C.Case#		Filed Date			
Court				Ph#			
Service Type		Answer Filed by (Def/Atty)		Date Served			
Reason:							
Hearing Date		Time		AM/PM	<input type="checkbox"/>	Date Judgement Entered	
Judge Name				Judgement Amount			
Court Room		Ph#		Ext		Judgement Book	
				Page #			
Nulla Bona (Date/Info)							
Deposition Date		Time		AM/PM	<input type="checkbox"/>	Judgement Satisfied Date	
Case Dismissed	<input type="checkbox"/>	Date		Reason			
Fifa Received (Y/N)	<input type="checkbox"/>	Fifa Satisfied (Y/N)	<input type="checkbox"/>	Fifa Vacated (Y/N)	<input type="checkbox"/>		

**F2-Garnishments** **F7-Exit** **F12-Update** Up/Down = change defendant



## Garnishment Screen

Use the **Garnishment Screen** to enter up to 5 garnishments for each defendant.

### To access the Garnishment Screen:

1. From *Main Menu* select **Inquiry menu** then select **Account Inquiry** and bring up an account  
**NOTE:** You can also access **Account processing menu** then select **Account inquiry**
2. From the **Account Detail Screen** press **F6** for **Full Legal** screen, **F8** for the **Suit Detail** screen then press **F2** for **Garnishment** screen
3. Type in information and press **F12** to update and/or go to view info for next defendant

*Garnishment*		* Def1 * Case # 001480304	
Garnishment Type	<input type="text"/>	Sequence#	1
Place	<input type="text"/>	Garnishment Expired	<input type="checkbox"/> Date <input type="text"/>
Addr	<input type="text"/>	Attn	<input type="text"/>
City	<input type="text"/>	Phone Number	<input type="text"/>
Contact	<input type="text"/>	Ext.	<input type="text"/>
Garnishment filed in Court Code	<input type="text"/>	C.Case#	<input type="text"/>
Court	<input type="text"/>	Ph#	<input type="text"/>
Service Type	<input type="text"/>	Answer Filed by (Def/Atty)	<input type="text"/>
Reason:	<input type="text"/>		
Hearing Date	<input type="text"/>	Time	<input type="text"/> AM/PM <input type="checkbox"/>
Judge Name	<input type="text"/>		
Court Room	<input type="text"/>	Ph#	<input type="text"/>
Deposition Date	<input type="text"/>	Time	<input type="text"/> AM/PM <input type="checkbox"/>
Case Dismissed	<input type="checkbox"/>	Date	<input type="text"/>
Fifa Received (Y/N)	<input type="checkbox"/>	Fifa Satisfied (Y/N)	<input type="checkbox"/>
		Fifa Vacated (Y/N)	<input type="checkbox"/>
F2-More Garnishments		F7-Exit	F12-Update
Up/Down = change defendant			

## Clerical Operations Changes

### Additional Account Processing Types

RMEx 3.0 includes two additional Account Processing Types, Cell phone numbers only and Other phone numbers only.



Click icon to listen to examples of how to use the two new *Account Processing Types*!

### To access Account Processing Types:

1. From the *RMEx Main Menu* select **Account Processing Menu**, then select **Display Accounts** to be worked

2. Enter the required *Type of processing* and the necessary details to access the accounts that are to be worked (as if in the previous version)

```

                                Account Processing
Type of processing  9
QCat              000
Time frame (A,M,P) M
User ID          CHAMEE__  Worker code ____
Insurance starting _____
Priority client (Y) -

                                Time 6:36:51
                                Bypass time zone
                                logic (Y) _

                                NUMBER WORKED
PROCESSING-->  1. Broken promises          0
TYPES          2. Follow-up dates         0
               3. New business            0
               4. Work phone numbers      0
               5. Home phone numbers only 0
               6. No phones               0
               7. Hot accounts            0
               8. Non-collector accounts  0
               9. Cell phone numbers only 0
               0. Other phone numbers only 0

                                Total worked through account processing 0
                                Total number of debtors worked          0

F2-Work map F7-Exit F9-Goals  Press ENTER to continue
    
```

## Compliance Changes

### State Compliance

The *State Compliance* module provides users with four key controls to enforce compliance with state regulations. The controls are:

#### Allowable Calling Period

Different states have different *Allowable Calling Periods* by day of the week and by type of call.

**EXAMPLE:** You can start calling California at 8am local time with live agents, but you cannot use virtual agents until 9am.

#### Holidays

There are different rules for calling on holidays; different states and provinces have different holidays in addition to national holidays. The *State Compliance* module contains provision for specifying the holidays for each individual jurisdiction at the state or national level. The *Allowable Calling Period* for holidays is entered onto the system and RMEx will prohibit a call outside that period.

#### Maximum Calls by State

Different states have different rules concerning the volume and frequency of calls to a consumer. The *State Compliance* module allows users to specify the maximum number of calls within a period.

#### The Home before Work Rule

Some states have a *must call home before work* rule. An attempt to contact the consumer at home must be made in good faith prior to calling a work number. The *State Compliance* module allows users to indicate which

states require this rule and prohibits a call to any work numbers for a specified number of days after a call to a home number.

## I-Tel Changes

### Campaign Merging Options

One of the newest features, *Campaign Merging Options* allows the clients to merge the campaigns automatically to reduce the burden of handling them manually. This option is designed to cover the whole area concerned with managing campaigns.

**EXAMPLE:** There are twenty campaigns with a total number of five thousand accounts and five collectors. Assuming that a collector can work a maximum of four hundred accounts per day – that results in a total of two thousand from the five collectors and leaving three thousand accounts behind. The feature can be setup to handle this situation efficient way (the field **Include if not worked for \_\_\_ days**).



Click icon to listen to examples of situations when you should consider using *Campaign Merging Options*!

#### To Run Campaign Merge Options:

1. From the *RME X Main* menu select **I-Tel options** menu
2. Select option **Queue Consolidation** options
3. Select option **Campaign merging** options

4. From the *Campaign merging options* screen, type in **Option code** and press **ENTER**
5. Type a **Description** for the *Option code*
6. Type in the **Campaigns** to be selected

**RMEEx**      **QUANTRAX CORPORATION INC.**

**ENTER**  
**ATTN**  
**PAGEUP**  
**PAGEDN**  
**EXT**  
**HELP**  
**CALENDAR**  
**EVENTS**

Campaign merging options

Company      2 Owe Us Collections  
Option code    GROUP 1  
Description    CAMP. 12345

Campaigns to select

CAMPAGN 1
CAMPAGN 2
CAMPAGN 3
CAMPAGN 4
CAMPAGN 5

Run on days MTWTFSS (Y)            (Leave blank for all)  
Include if not worked for     days      Check no contact (Y)   
Select maximum of           accounts per campaign (blank=ALL)  
Make inactive (D)              
Put into campaign           

**F1-New Selection**    **F3-Search**    **F4-Delete**    **F7-Exit**    **F10-Run now (update first)**

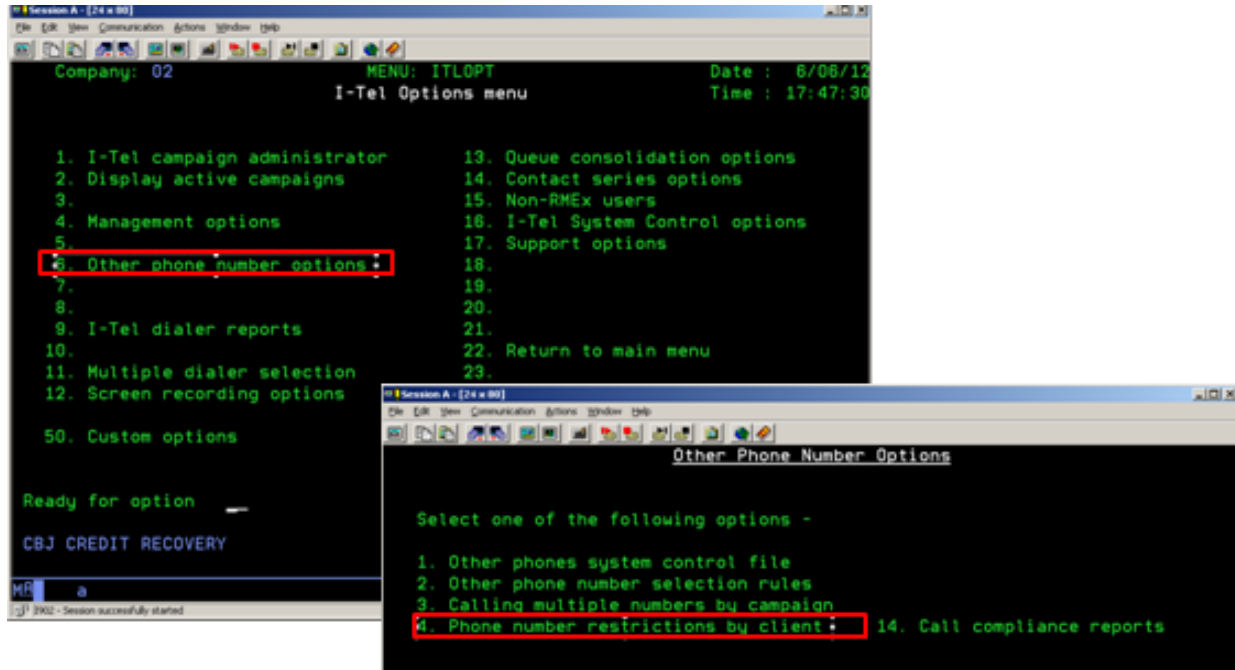
4. Set up the options:
  - **Run on days (Y)** – insert a **Y** in the relevant position to specify on which days of the week (MTWTFSS) you wish to work the accounts
  - **Include if not worked for \_\_\_ days** - giving the priority for the date last worked
  - **Check no contact (Y)** - to select the account even if it has been attempted within the number of days mentioned in the previous option, with no contact
  - **Select maximum of \_\_\_\_\_ accounts per campaign** – the maximum number of accounts that you wish to select/work from each campaign
  - **Make inactive (D)** – in case you wish to de-activate this *Option Code* you can insert a **D** in front of this option
5. When finished press **ENTER** to **Save merge options**
6. Press **F10** to **Run now (update first)** – To execute this merge campaign criteria interactively now

### Controlling Maximum Calls

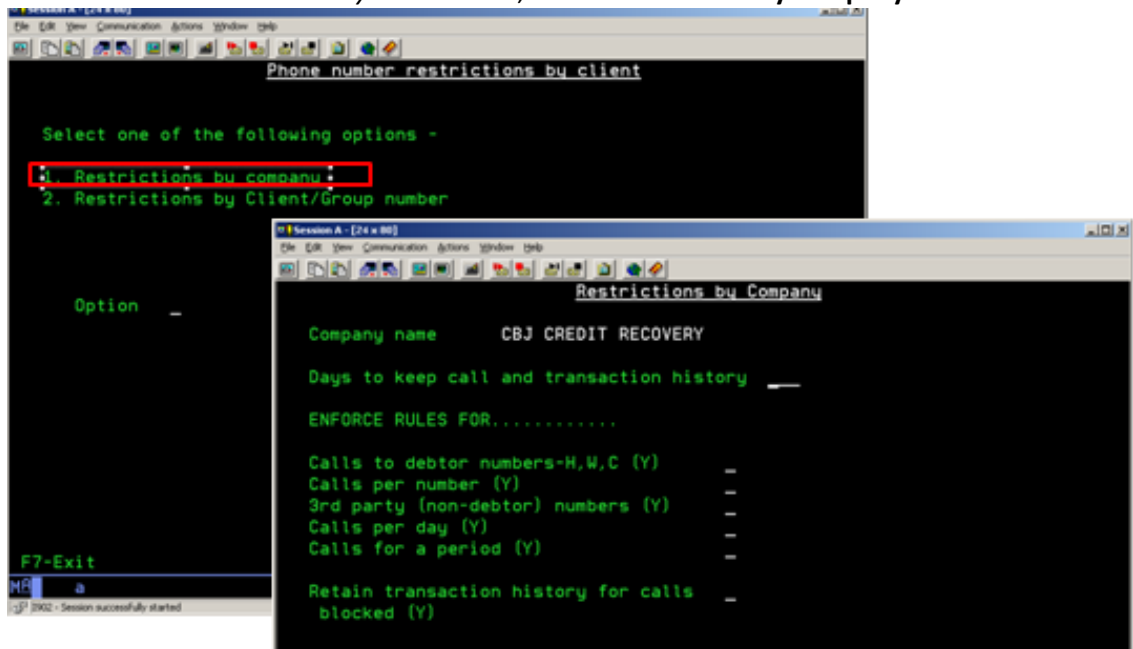
*Controlling Maximum Calls* ensures that an agent(s) cannot launch an excessive number of calls to any number or account. The feature can be turned on and off by company and sets call limits by client group number. Limits can be placed on individual numbers, accounts, debtor numbers and non-debtor numbers, and home numbers, work numbers and cell numbers.

#### To Activate Maximum Calls Controls (Company level):

1. From the *I-Tel Options* menu select **Other phone number options**
2. From the *Other Phone Number Options* menu, select **Phone number restrictions by client**

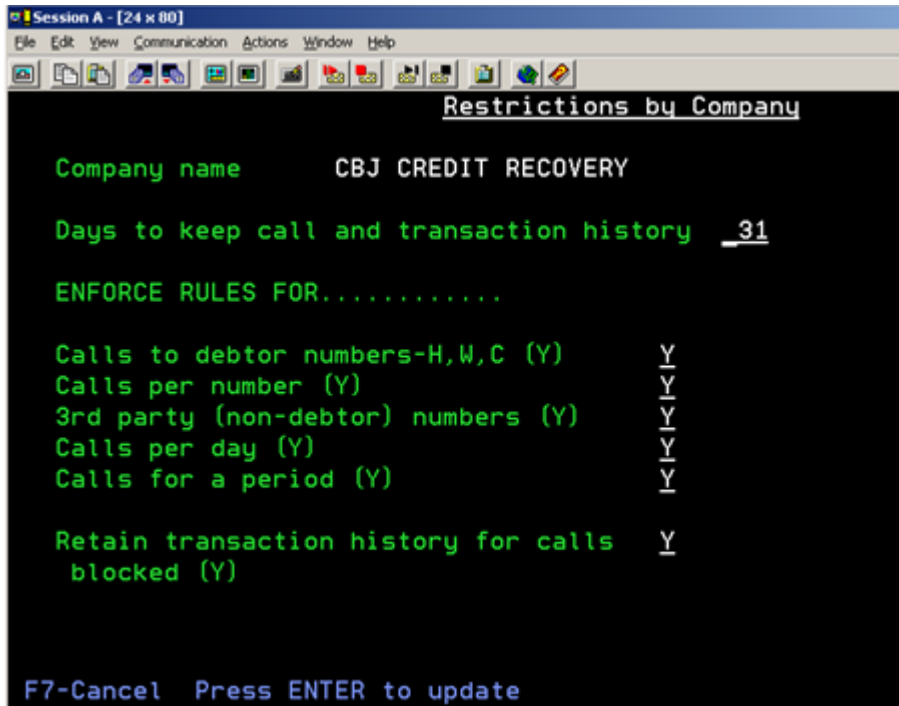


3. From the *Phone Number Restrictions by Client* menu, select **Restrictions by company**



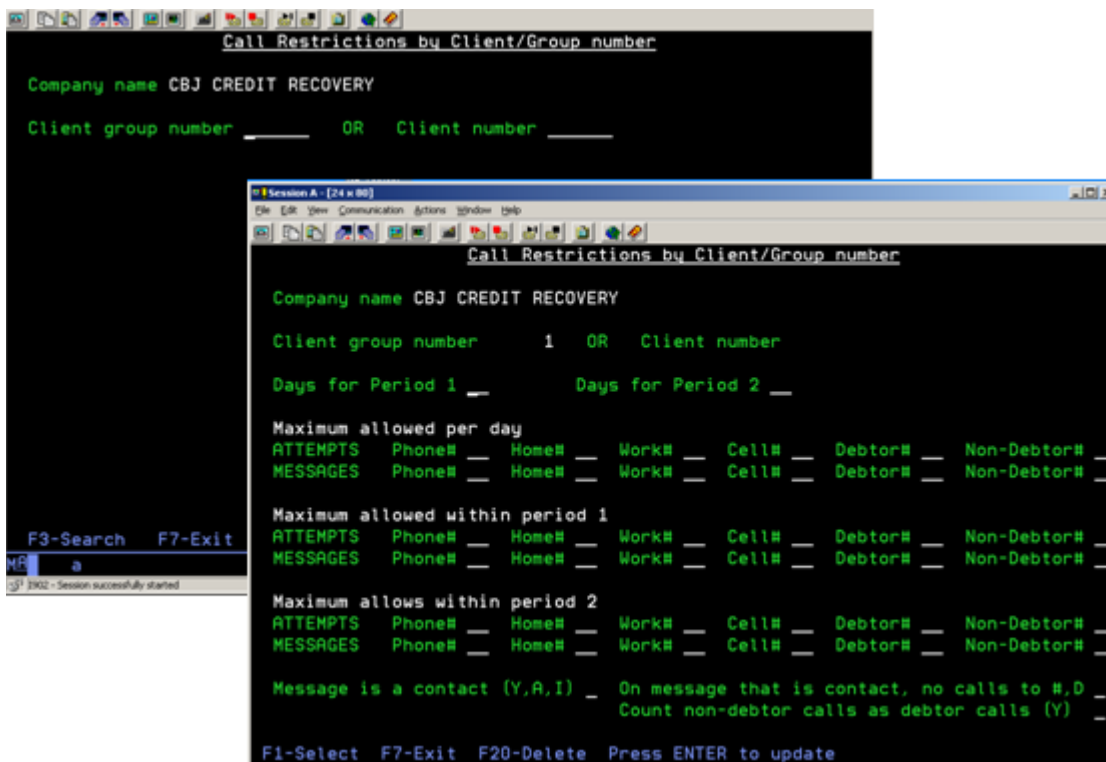
4. The **recommended** values are shown below

**NOTE:** Entering the values shown below turns on *Maximum Calls Processing* for the company you are using. Next you need to enter the call limits for a particular client number or client group number.



**To Specifying the Maximum Number of Calls (by Client):**

1. From *Phone Number Restrictions by Client* menu, select **Restrictions by Client/ Group number**
2. Type a client group number or client number
3. Type the maximum number of calls for different types of numbers (see table below for details)

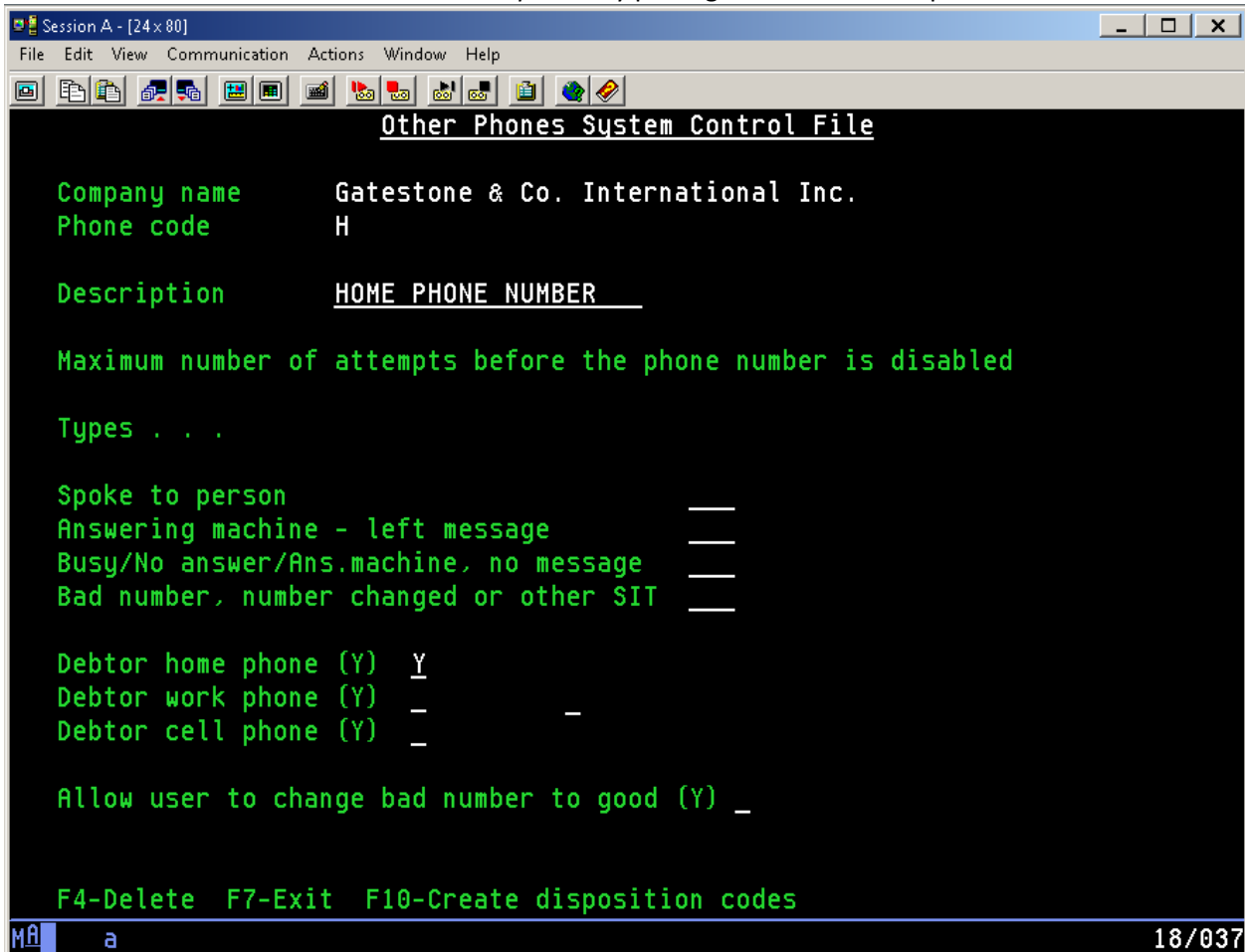


Call Restrictions by Client/Group Number	
<b>Phone#</b>	The maximum number of times a call can be launched to a single phone number
<b>Home#</b>	maximum number of times a call can be launched to a phone number designated as a home number
<b>Work#</b>	The maximum number of times a call can be launched to a phone number designated as a work number

<b>Cell#</b>	The maximum number of times a call can be launched to a phone number designated as a cell number
<b>Debtor#</b>	The maximum number of times a call can be launched to a phone number designated as a debtor number
<b>Non-Debtor#</b>	The maximum number of times a call can be launched to a phone number designated as a non-debtor number

**NOTE:** A number is defined as a *debtor home number* if the phone number has a phone code that is marked as a debtor home phone. This parameter can be changed from the *Other Phone Number Options* menu and selecting **Other phones system control files** then type the relevant phone code. Each phone code that belongs to a debtor should be marked as a debtor home phone, work phone or cell phone. If none of these options is set to Y then the phone code is considered to be non-debtor phone code.

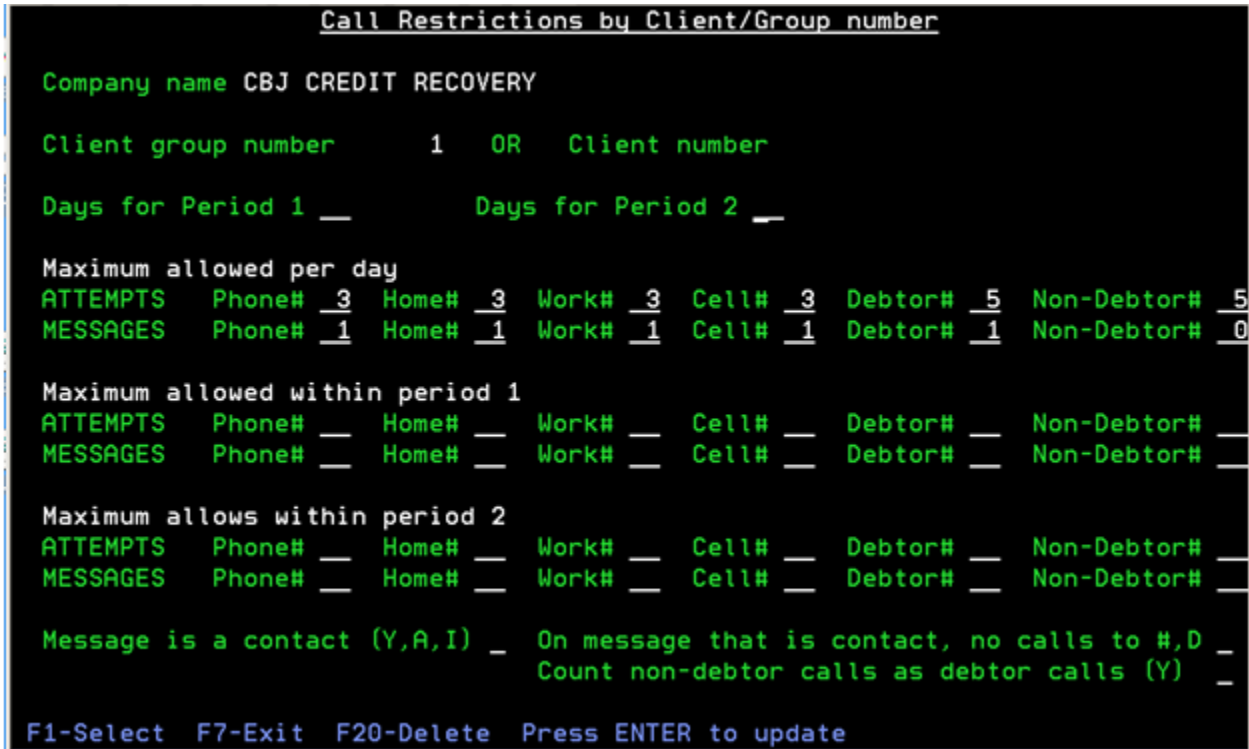
**EXAMPLE:** Phone code H is marked a *Debtor home phone* by placing a Y next to that option



**EXAMPLE:** The following screen has been completed and a description of each specification is below

- A maximum of three calls can be launched to a single number, even though five calls may be made to debtor numbers.
- Three calls may be launched to a phone number with a phone code designated as a debtor home phone, provided that the maximum number of calls to a debtor is not exceeded.
- Three calls may be launched to a phone number with a phone code designated as a debtor work phone, provided that the maximum number of calls to a debtor is not exceeded.
- Three calls may be launched to a phone number with a phone code designated as a debtor cell phone, provided that the maximum number of calls to a debtor is not exceeded.

- Five calls may be launched to a phone number with any phone code designated as a debtor phone, provided that the maximum number of calls to an individual phone number, or a phone type, is not exceeded.
- Five calls may be launched to a phone number with any phone code designated as a non-debtor phone.  
**NOTE:** In this example, these calls are in addition to any calls launched to debtor numbers. This is because the *Count non-debtor calls as debtor calls (Y)* field at the bottom of the screen is set to blank.
- Only one message may be left per day. The message can be left on any type of number belonging to the debtor. No messages can be left on non-debtor phone numbers.



There are three fields at the bottom of the screen:

- ✓ **Message is a contact (Y, A, I):** Allows the user to restrict subsequent calls to a number if the first call resulted in a contact
  - Y** Any message is considered a contact
  - A** Messages left by live agents are considered contacts
  - I** Messages left by IVR agents are considered contacts
- ✓ **On message that is a contact, no calls to #, D:** If a call has been launched to a number and has resulted in a message being left, the user has the option of prohibiting subsequent calls to either that number or to any debtor number
  - #** Prohibit subsequent calls to the number dialed
  - D** Prohibit subsequent calls to any debtor number.
- ✓ **Count non-debtor calls as debtor calls (Y):** Allows you to count any call on an account to be considered a *debtor* call
  - Y** Limit the maximum number of calls on an account to the value specified in the Debtor# field; the value in the 'Non-debtor#' field will be ignored