Introducing Attorney Meaningful Review (AMR) in Collection-Master

COLLECTION MASTER

Presented by: John Currey

The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

What is AMR

- Attorney Meaningful Review
- Audit My Records
- A must-have Rocketship
- New tool in Collection-Master
  - Review claim data and media
    - Configured for stages of the claim
    - State-specific configurations
    - Review images and document packages

Why Use AMR

AMR is a dashboard to view the account based on the task at hand

- Increase efficiency in which reviews are performed
- All data points are configurable
- Unlimited configurations
- Consolidated data views

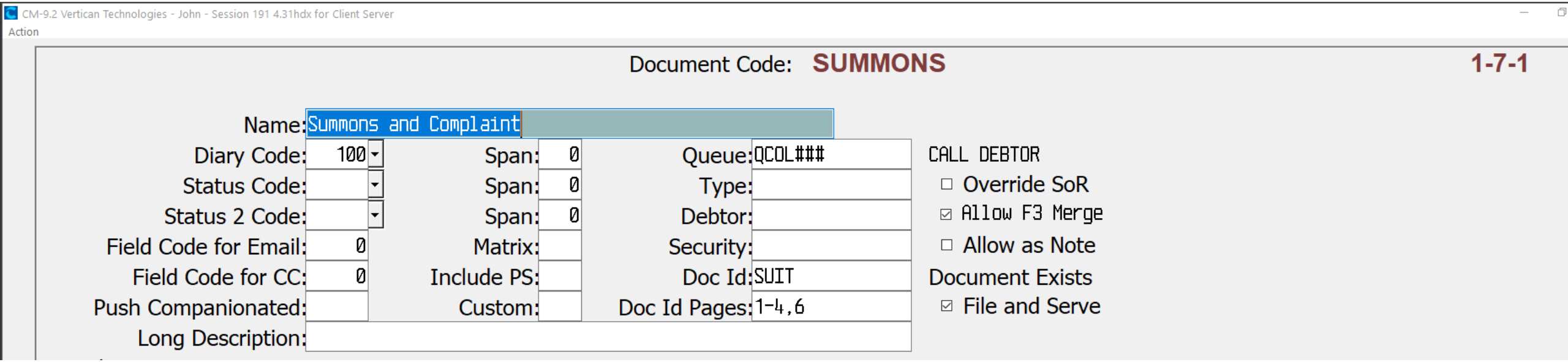
Why Use AMR

AMR is a dashboard to view the account based on the task at hand

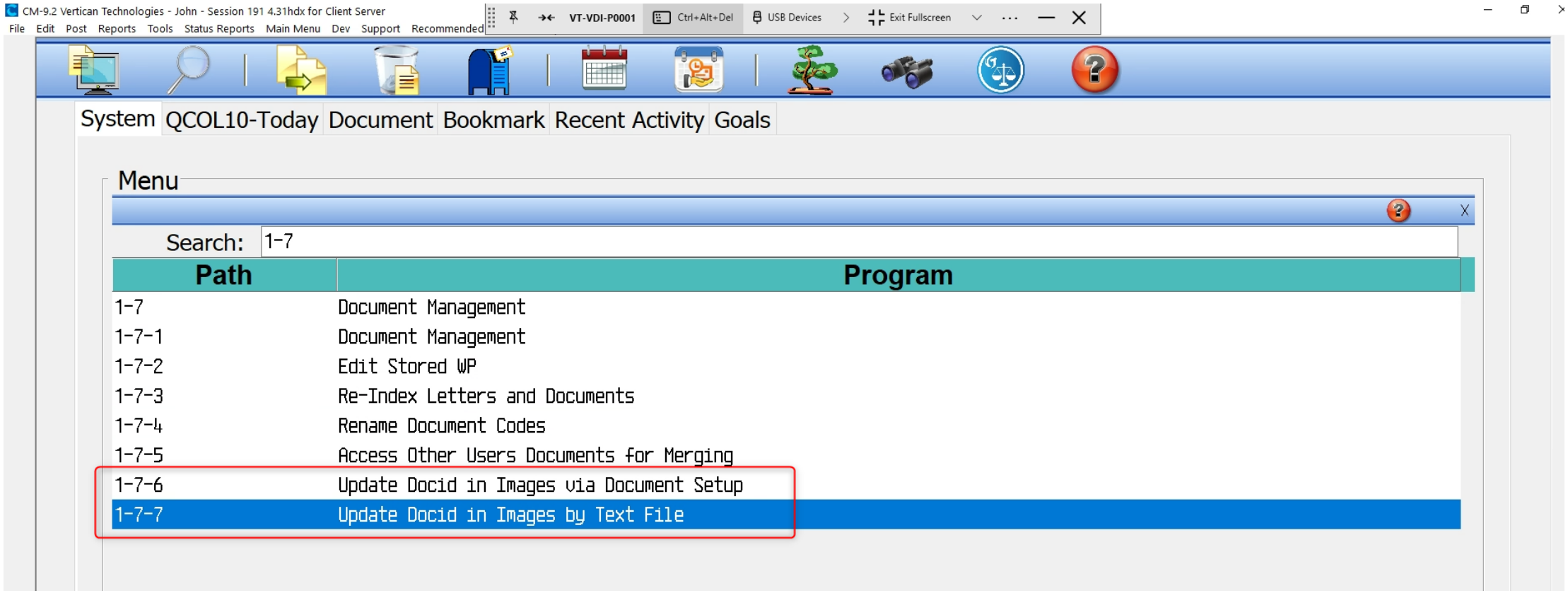
- Record keeping
  - Enhanced logging
    - Records of who did what, and when
  - Detailed AMR PDF report
    - Saved in the Claim Folder
    - Pass/Fail details

New Collection-Master Concepts

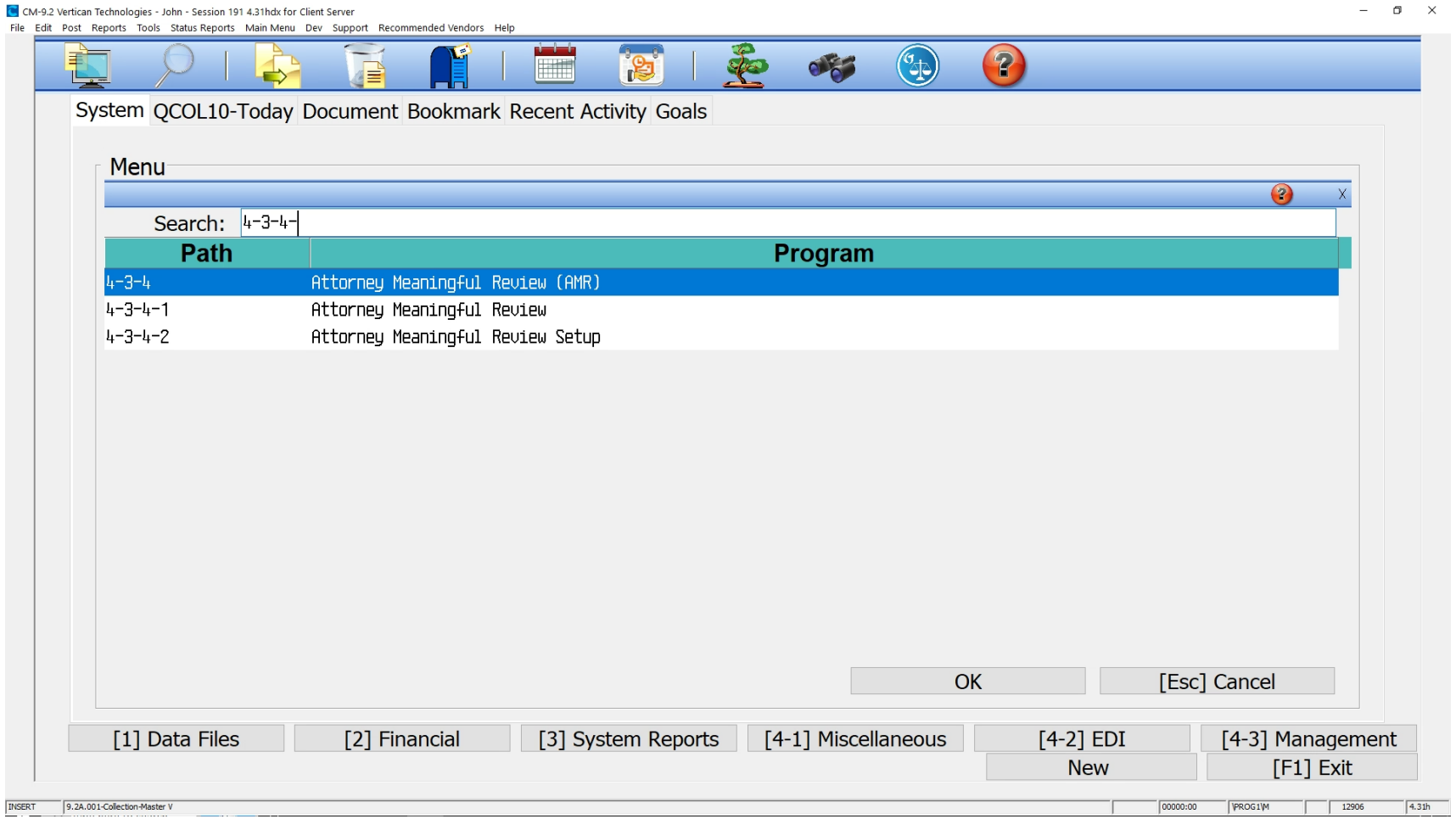
- DOCIDs
  - An identifier or tag to locate specific media



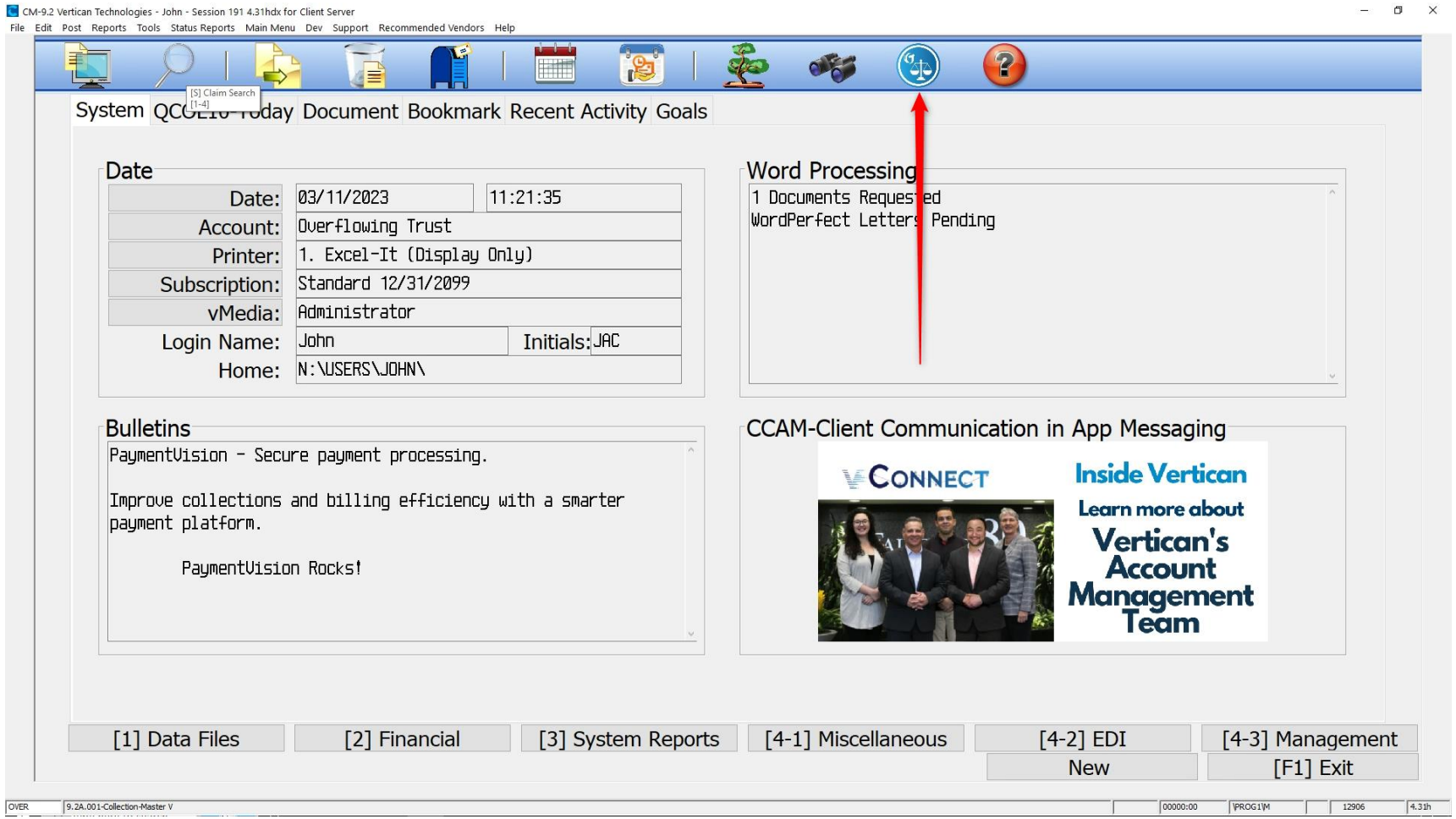
New Collection-Master Concepts



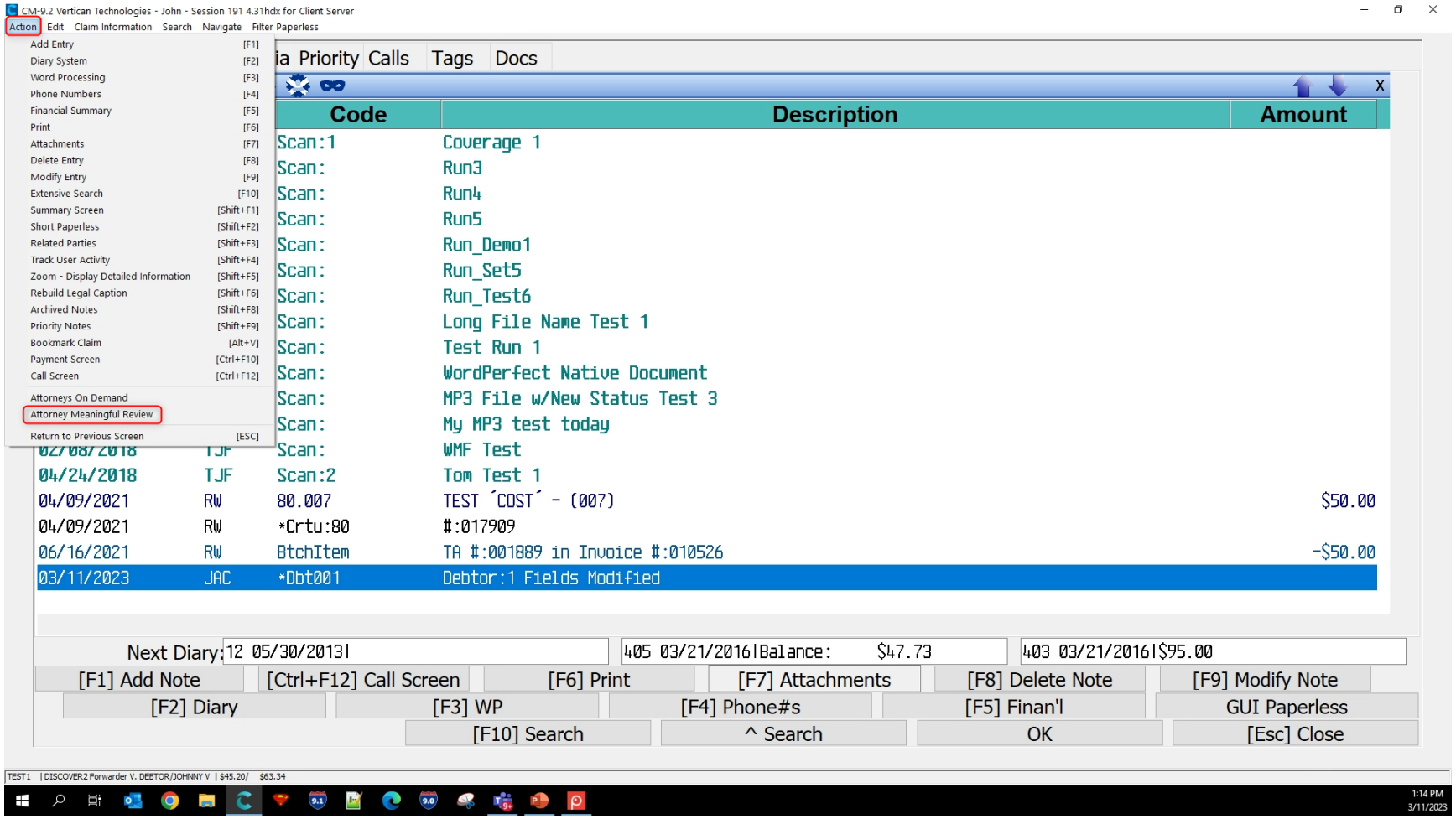
Accessing AMR



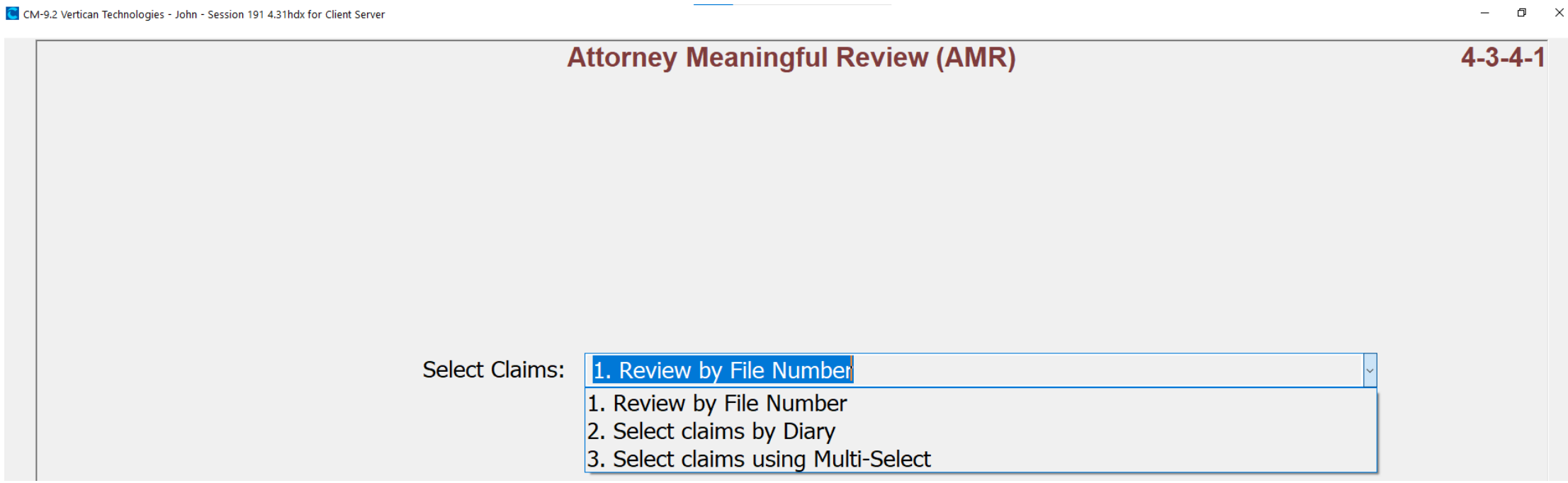
Accessing AMR



Accessing AMR



Accessing AMR



Configuring AMR

AMR Configuration [4-3-4-2]

Groups

- Must be unique
- Consider name groups by Queue

Review type

- Attorney
- Pre-attorney
- Quality control

Staging

- Used to connect Court Documents to stage of claim

Many Uses

- Smart Pre-Filtering by Triggering Smart Documents:
  - So where "this condition" or "that condition", remove any of these QSUIT diaries and add new diaries, send X-codes with elaborate scripts, email someone, etc. to fix whatever is wrong or even close the claim based on circumstance
  - Check the following:
    - Have an affidavit from client
    - No fraud
    - No suit
    - No Payment Plan
    - Last pay date>180
    - Has employer
    - Has bank
    - Owns property

Questions Submitted in Advance

- Is there a template for Default Review?

Q
A

The Mastermind Series

To learn about upcoming trainings:
https://vertican.tech/mastermind/

To view past trainings:
https://vimeo.com/vertican/