

Introducing Attorney Meaningful Review (AMR) in Collection-Master

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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

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Action

Document Code: **SUMMONS**

1-7-1

Name:	Summons and Complaint					
Diary Code:	100	Span:	0	Queue:	QCOL###	CALL DEBTOR
Status Code:		Span:	0	Type:		<input type="checkbox"/> Override SoR
Status 2 Code:		Span:	0	Debtor:		<input checked="" type="checkbox"/> Allow F3 Merge
Field Code for Email:	0	Matrix:		Security:		<input type="checkbox"/> Allow as Note
Field Code for CC:	0	Include PS:		Doc Id:	SUIT	Document Exists
Push Companiated:		Custom:		Doc Id Pages:	1-4,6	<input checked="" type="checkbox"/> File and Serve
Long Description:						

New Collection-Master Concepts

The screenshot shows a software application window titled 'CM-9.2 Vertican Technologies - John - Session 191 4.31hdx for Client Server'. The window has a menu bar with 'File', 'Edit', 'Post', 'Reports', 'Tools', 'Status Reports', 'Main Menu', 'Dev', 'Support', and 'Recommended'. Below the menu bar is a toolbar with various icons. The main content area has a breadcrumb trail: 'System QCOL10-Today Document Bookmark Recent Activity Goals'. A 'Menu' dialog box is open, showing a search for '1-7'. The search results are displayed in a table with two columns: 'Path' and 'Program'. The table contains the following data:

Path	Program
1-7	Document Management
1-7-1	Document Management
1-7-2	Edit Stored WP
1-7-3	Re-Index Letters and Documents
1-7-4	Rename Document Codes
1-7-5	Access Other Users Documents for Merging
1-7-6	Update Docid in Images via Document Setup
1-7-7	Update Docid in Images by Text File

The row for '1-7-7' is highlighted in blue and enclosed in a red rectangular box.

Accessing AMR

System QCOL10-Today Document Bookmark Recent Activity Goals

Menu

Search: 4-3-4

Path	Program
4-3-4	Attorney Meaningful Review (AMR)
4-3-4-1	Attorney Meaningful Review
4-3-4-2	Attorney Meaningful Review Setup

OK [Esc] Cancel

[1] Data Files [2] Financial [3] System Reports [4-1] Miscellaneous [4-2] EDI [4-3] Management
New [F1] Exit

INSERT 9.2A.001-Collection-Master V 00000:00 | PROG1\M 12906 4.31h

Accessing AMR

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File Edit Post Reports Tools Status Reports Main Menu Dev Support Recommended Vendors Help

System QCC 10 Today Document Bookmark Recent Activity Goals

[S] Claim Search [1-4]

Date

Date:	03/11/2023	11:21:35
Account:	Overflowing Trust	
Printer:	1. Excel-It (Display Only)	
Subscription:	Standard 12/31/2099	
vMedia:	Administrator	
Login Name:	John	Initials: JAC
Home:	N:\USERS\JOHN\	

Word Processing

1 Documents Requested
WordPerfect Letters Pending

Bulletins

PaymentVision - Secure payment processing.

Improve collections and billing efficiency with a smarter payment platform.

PaymentVision Rocks!

CCAM-Client Communication in App Messaging

CONNECT **Inside Vertican**
Learn more about **Vertican's Account Management Team**

[1] Data Files [2] Financial [3] System Reports [4-1] Miscellaneous [4-2] EDI New [4-3] Management [F1] Exit

OVER 9.2A.001-Collection-Master V 00000:00 | PROGRAM 12906 4.31h

Accessing AMR

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Action Edit Claim Information Search Navigate Filter Paperless

Add Entry [F1]
 Diary System [F2]
 Word Processing [F3]
 Phone Numbers [F4]
 Financial Summary [F5]
 Print [F6]
 Attachments [F7]
 Delete Entry [F8]
 Modify Entry [F9]
 Extensive Search [F10]
 Summary Screen [Shift+F1]
 Short Paperless [Shift+F2]
 Related Parties [Shift+F3]
 Track User Activity [Shift+F4]
 Zoom - Display Detailed Information [Shift+F5]
 Rebuild Legal Caption [Shift+F6]
 Archived Notes [Shift+F8]
 Priority Notes [Shift+F9]
 Bookmark Claim [Alt+V]
 Payment Screen [Ctrl+F10]
 Call Screen [Ctrl+F12]

Attorneys On Demand

Attorney Meaningful Review

Return to Previous Screen [ESC]

02/08/2018 T JF
 04/24/2018 T JF
 04/09/2021 RW 80.007
 04/09/2021 RW *Crtu:80
 06/16/2021 RW BtchItem
 03/11/2023 JAC *Dbt001

Code	Description	Amount
Scan:1	Coverage 1	
Scan:	Run3	
Scan:	Run4	
Scan:	Run5	
Scan:	Run_Demo1	
Scan:	Run_Set5	
Scan:	Run_Test6	
Scan:	Long File Name Test 1	
Scan:	Test Run 1	
Scan:	WordPerfect Native Document	
Scan:	MP3 File w/New Status Test 3	
Scan:	My MP3 test today	
Scan:	WMF Test	
Scan:2	Tom Test 1	
80.007	TEST 'COST' - (007)	\$50.00
*Crtu:80	#:017909	
BtchItem	TA #:001889 in Invoice #:010526	-\$50.00
*Dbt001	Debtor:1 Fields Modified	

Next Diary: 12 05/30/2013 | 405 03/21/2016 | Balance: \$47.73 | 403 03/21/2016 | \$95.00

[F1] Add Note [Ctrl+F12] Call Screen [F6] Print [F7] Attachments [F8] Delete Note [F9] Modify Note
 [F2] Diary [F3] WP [F4] Phone#s [F5] Finan'l GUI Paperless
 [F10] Search ^ Search OK [Esc] Close

TEST1 | DISCOVER2 Forwarder V. DEBTOR,JOHNNY V | \$45.20 | \$63.34

1:14 PM 3/11/2023

Accessing AMR

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Attorney Meaningful Review (AMR)

4-3-4-1

Select Claims:

1. Review by File Number

1. Review by File Number

2. Select claims by Diary

3. Select claims using Multi-Select

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?



The Mastermind Series

To learn about upcoming trainings:

<https://vertican.tech/mastermind/>

To view past trainings:

<https://vimeo.com/vertican/>

