

Kinum Client Portal Quick Reference Guide – Step 2 Connect (Flat Fee Svc)

Kinum’s secure client portal can be accessed at this location: <https://kinum.lariatcentral.net/login>
Your **username** and **password** for the portal will be provided by a Kinum representative.

How to Submit Accounts (One by One)

The screenshot shows the Kinum Client Portal interface. At the top, there is a navigation bar with the Kinum logo, a '+ Add Accounts' button (highlighted with a red arrow), and other menu items like 'Accounts', 'Reports', 'Tools', and 'Action Needed!'. Below the navigation bar, there is a sidebar with account type options: 'Medical Consumer', 'Standard Commercial', 'Medical Insurance', and 'Standard Consumer' (highlighted with a white arrow). The main content area shows the 'Standard Consumer Standard Consumer Form' with a 'Cancel' button. The form has two main sections: 'Account Options' and 'Account Information'. In the 'Account Options' section, there is a 'Debt Type' dropdown set to 'Consumer Non-Medical' and a 'Product' dropdown set to 'STEP 2 STANDARD AUTHORIZED' (highlighted with a white arrow). The 'Account Information' section has fields for 'Debtor First Name', 'Ini', 'Debtor Last Name', and 'Alternate ID'.

To send a new account to Kinum click the “+Add Accounts” button on the black tool bar.

In the top left corner, you **may** see an option to choose “Standard Consumer” (Individuals) or “Standard Commercial” (business accounts). If so, click on the type of account & you will see the corresponding data entry form. Enter the debtor information. (Medical clients will see “Medical Consumer” in that section)

Important: Select the correct product from the dropdown on right. Select **STEP 2** for Flat fee collections

Step 2 (Connect) Service - This includes 5 Collection Demands from Kinum. Step 2 is most beneficial for mid level accounts (60 – 180 days past due). 100% of what is recovered is paid directly to you.

Accounts which remain uncollected after Step 2 service, can me moved to Step 3 service.

Step 3 (Collect) is the traditional Collection service. There is no cost to send the account, but if we collect we get a % and you keep the rest. In this phase, all communications and payments should be referred back to us. If a debtor in Step 3 calls you, simply tell them they need to reach out to us to resolve the account. They can call us at **(888) 281-1750**. Our Step 3 tutorial is very similar to Step 2 tutorial, just that you cannot pause/stop accounts yourself, but you can request Kinum to do it.

Step 3 Tutorial link : https://kinumorders.com/new/Client_Portal_Tutorial_Step_3_Collect_Only_Contingency.pdf

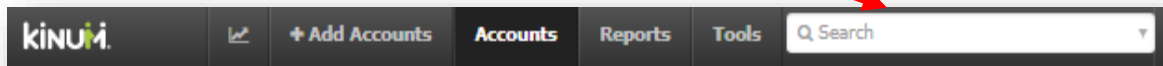
The items marked with a “*” are mandatory. All other items are optional, but recommended. Give us as much info as you have readily available. Once complete simply scroll to the bottom of the page and Click the “Create” button. That’s it. (Screenshot with sample data: [Standard Clients](#) | [Medical Clients](#))

What is “Date of Service” (or “Date of Treatment”) on the form? The date when they received the service last time from you. (To do a proper Bankruptcy scrub and for Statute of Limitations check).

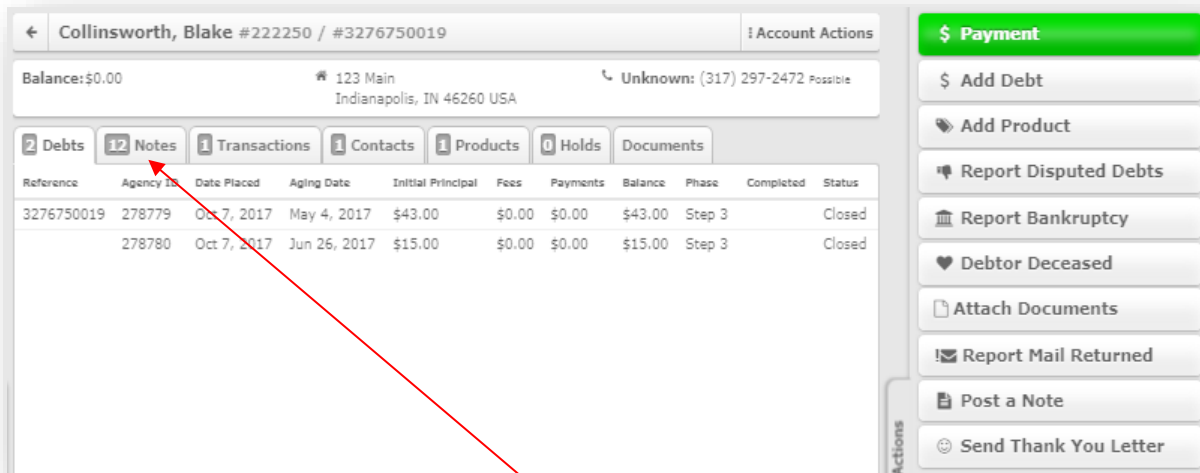
(**Note:** You can submit a batch of accounts using **Excel Spreadsheet** also. Refer [Page 6](#) for that.)

Updating Accounts and Reporting Payments

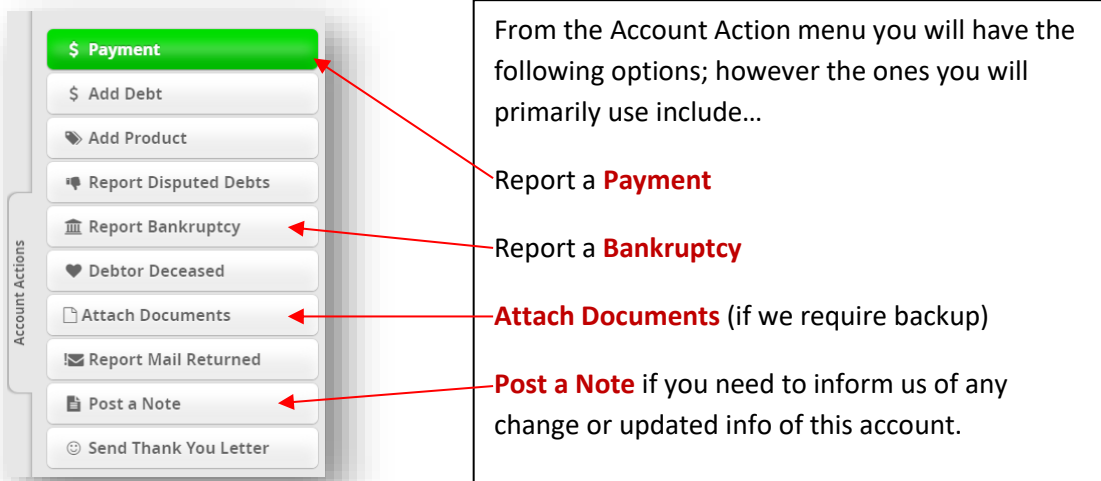
The easiest way to View, Update or Report Payments on accounts is to use the Search feature on the black toolbar.



Simply enter the account # or (first or last) name and the account will appear. Click the name to view.



The details of the account will appear. You can click "Notes" to see the activity on the account, or choose an action item from the **Account Actions** menu (located on the right-hand side).



Pausing or Stopping Collections

There will be times where you may need to place a temporary hold on accounts (Payment arrangement, Billing mistake, Reviewing a debtor's account, etc.) When you pull up an account on the portal you can click the **Products** tab to see their active Product with Kinum. If you want to **Pause** (⏸) the account or maybe you just need to **Stop** (⊘) it altogether you can click the appropriate button.

If you click to "Stop" button, this simply stops the Product but does not close the balance. If you want the balance completely removed you will need to Stop the account and then "Post a Note" to inform us to "Close" the account. For reporting a payments, use Payments button shown on Page 2, not the stop button.

The screenshot displays the Kinum portal interface. At the top, there are navigation tabs: Debts, Notes, Transactions, Contacts, Products, and Documents. The 'Products' tab is selected. Below the tabs, the account details for '- HYBRID MEDICAL AUTOMATIC' are shown, including Batch: 138039 and Associated Debts: #279398. The status is 'Running'. To the right of the status, there are two buttons: a pause button (⏸) and a stop button (⊘). Below the account details, there are two collection steps: 'STEP 1 HYBRID MEDICAL' and 'STEP 2 MEDICAL HYBRID AUTOMATIC'. Each step has a progress bar and a list of letters. Step 1 shows 'Letter 1/1' and 'Transfer to Step 2'. Step 2 shows 'Letter 1/4', 'Letter 2/4', 'Letter 3/4', 'Letter 4/4', 'Step 2 Completed', and 'Transfer to Step 3'. The process launch and complete dates are also displayed for each step.

When you click the pause button a window will appear...

The dialog box contains the following text and fields:

Warning: You have changed the status of this product and its processes to "paused". Continue?

Pause Reason: * [dropdown menu]

Days to Pause: * [input field]

Note: [text area]

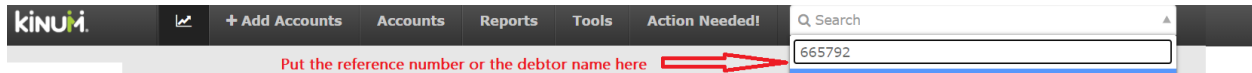
Buttons: [Close (X)] [Confirm (checkmark)]

Simply drop down "Pause Reason" and select Paused By Client, Payment Arrangement or Insurance and then click the check mark. Paused By Client will place the account in a pause status that can ONLY be resumed if you go to the Products tab and click Resume. Payment Arrangement and Insurance allows you to choose the **number of days** you want to pause an account for and it will **automatically resume** at the end of that time period, unless the account is Stopped or marked Paid in Full. We would also advise

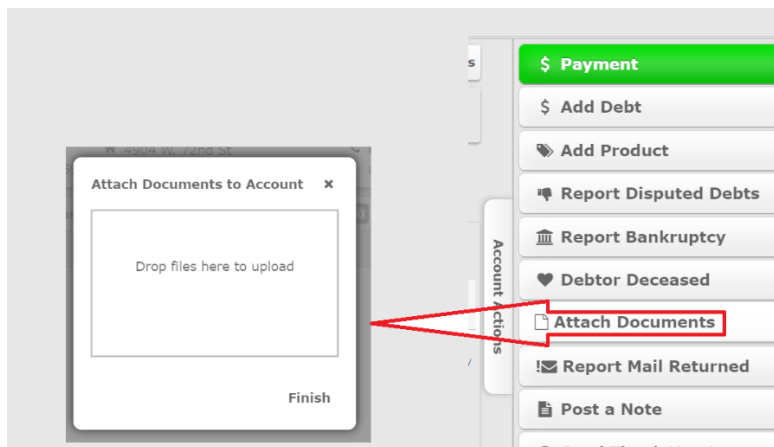
that you enter a note in the pause box to remind you of why the account was paused. Once an account has been paused the pause button will change to a **“Play” button** (▶) and you can simply click that to resume the account and we will pick up where we left off.

Providing us Backup Documentation for Disputed accounts

For compliance purpose, it is important that you possess relevant documents proving how much amount the debtor owes and when the payment was due. **For security reasons Kinum representatives usually do not mention debtor name in the email, they just provide a reference number** (like 665792)



When asked by a Kinum representative to provide the documentation regarding an account, kindly locate the debtor using the Search box (located on the black bar). You can **put the reference number provided by the representative**, select the debtor, and upload documents for that account using the **“Attach Documents”** button. Drop the relevant files from your computer and press the **“Finish”** button. Send a reply to the Kinum representative that you have uploaded the documentation now.



Transfer Accounts to Step 3 collections – You have to do it Manually

When accounts cycle through Step 2 and have not paid you will receive an Alert email explaining you have accounts pending transfer to Step 3. On the **black toolbar** at the top of the portal click **“Action Needed”** and you will be taken to a list of accounts that are ready to transfer to Step 3. Your **Transfer preference** mentioned in your Kinum’s contract agreement is **AUTHORIZE/MANUAL** Transfer. It means

- Your accounts never go to Step 3 unless you manually select specific accounts and Resume them for Step 3.
- Next to the Pause Reason you will see “awaiting user action.” Nothing will happen to these accounts until you either Stop them or Resume them.

Sample Screenshot of AUTHORIZED/ MANUAL Transfer: (“Action Needed” Page)

Holds						
▶ Resume Selected ◊ Stop Selected ◊ Advanced						
<input type="checkbox"/>	Batch	Debtor Name †	Product †	Paused	Reason	Status
<input type="checkbox"/>	373514	GEORGE GRAHAM	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 14, 2019 1:19 AM	Infinite Pause	Awaiting User Action
<input type="checkbox"/>	373508	VIRGINIA JOHN	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	August 7, 2019 10:45 AM	Paused By Client	Awaiting User Action
<input type="checkbox"/>	370568	SHERYL WOODS	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370567	SHERI VINSON	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370566	NAKEA VINSON COX	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370565	STACIE WRIGHT	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370564	LETICIA VASQUEZ	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370562	YESENIA RODRIGUEZ	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action
<input type="checkbox"/>	370561	DORIS WAGNER WEBB	- HYBRID MEDICAL (WITH 2 CALLS) AUTHORIZED	September 17, 2019 1:12 AM	PENDING STEP 3 TRANSFER	Awaiting User Action

OTHER “REASONS”:

Paused By Client – These are accounts you manually paused during Step 2. These will remain paused until you decide you want the account Resumed or Stopped.

Payment Arrangements/Insurance – These are accounts that you have paused for a payment plan or insurance issue and set a defined # of days for the account to Auto-Resume if that arrangement is not met. When that time expires, and if the account has not been marked Paid-in-Full, it will Auto-Resume from where it left off.

How to Manually Transfer an Account to Step 3 – Simply check the box to the left of their name and click the **“Resume Selected”** button at the top of the list.

Cleanup unwanted records: To remove some debtors from the list without moving to Step 3 & **CLOSE** the balance: Check the box, click **Stop Selected**, then click **Post a Note** & request the balance be **CLOSED**

How to Submit Multiple Accounts at once using Microsoft Excel Spreadsheet

Kinum also has the provision to submit accounts by uploading an XLS Sheet containing your debtors.

Please use one of these templates depending if you are a Standard or Medical client. Remove the dummy data (as it is for demonstration purpose only) and fill your own data. Fields in red are mandatory. However, we suggest providing maximum information for the optional fields as well.

Standard Clients :	https://kinumorders.com/new/Upload_Step_2_Standard.xlsx
Medical Clients : (with patient's information)	https://kinumorders.com/new/Upload_Step_2_Medical.xlsx

What about the Address field: Whatever is the last known address/phone of the debtor, that comes in the Address fields. We run USPS Change of address check to find the latest contact information anyway.

What is "Date of Debt" field: The date when they received the service last time from you. (To do a proper Bankruptcy scrub and for Statute of Limitations check).

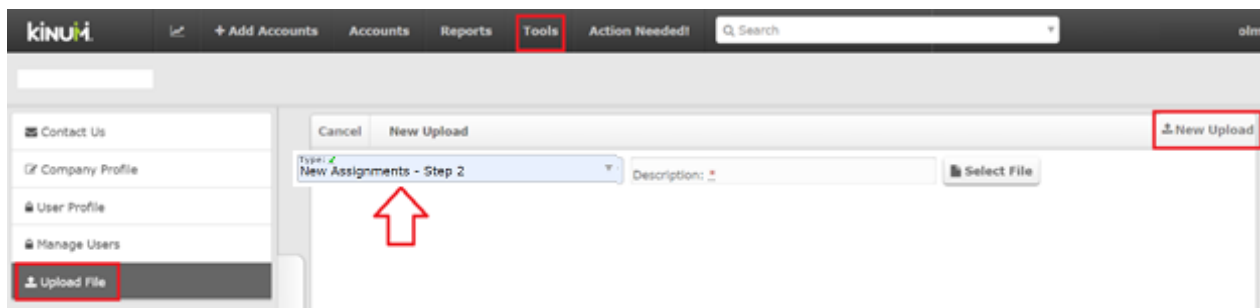
The "Contact 2" fields are for the Cosigner / Guarantor's information, it is optional.

Notes field is used to briefly explain us the nature of debt, say 1-3 lines for each debtor. If needed, our debt collector should be able to understand your notes, and briefly explain the case while making phone calls to the debtor/ guarantor / patient. This field is optional.

Once your file is ready, upload it on our client portal:

Tools >> Upload File > New Upload >> Select "New Assignments – Step 2" (Important) >>

Type something like this in Description box - "20 accounts for Step 2" >> **Select your XLS file & Upload**



Any doubts regarding Kinum's Client Portal?

For any questions, please contact your Sales Representative or

Reach out **Kinum's Central Client Support Phone: (888) 471-0280 x 4**

Fax: (877) 504-3190