

## Kinum Online Client Portal Quick Reference Guide – Step 3 Collect Only

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)

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” or “Standard Commercial” for business accounts. If so, click the type of account and you will be taken to the corresponding data entry form. Enter the debtor information. (Medical clients will see “Medical Consumer” in that section). Ensure that the “Product” is selected as **STEP 3** collections.

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](#) )

( **Note:** You can submit a batch of accounts using [Excel Spreadsheet](#) also. Refer [Page 4](#) for that.)

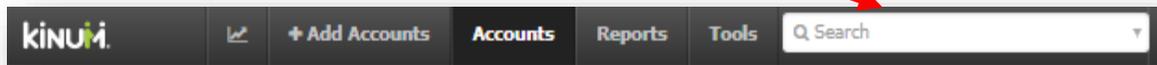
**What is “Date of Service” ( or “Date of Treatment”) on the form?** The date when they received the service last time from you. ( To do a proper Bankruptcy scrub and for Statute of Limitations check).

#### ***You are submitting accounts in Step 3 (Collect) Service***

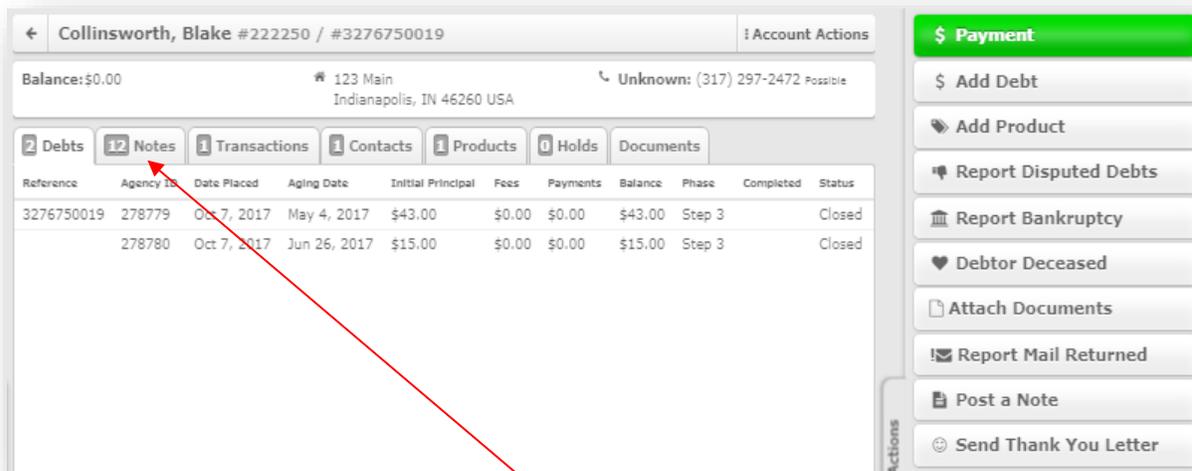
*Step 3 is the traditional Collection division. There is no cost to send the account, but if we collect we get a % and you keep the rest. In this phase, all communications and payments should be referred back to us. If a debtor in Step 3 calls you, simply tell them they need to reach out to us to resolve the account. They can call us at (888) 281-1750.*

## Updating Accounts and Reporting Payments

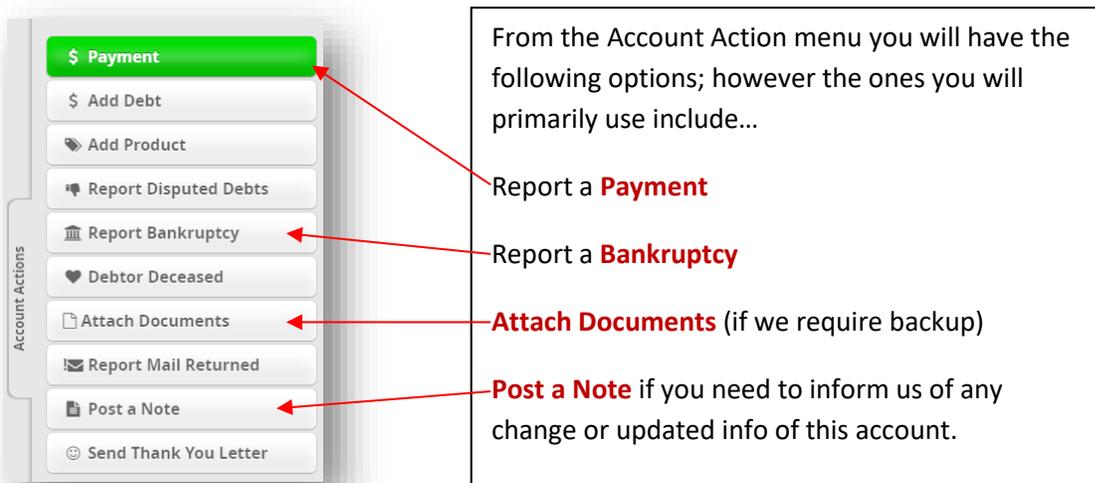
The easiest way to View, Update or Report Payments on accounts is to use the Search feature on the black toolbar.



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

Accounts that are in Step 3 Collect service cannot be self-paused (or self-stopped) by you instantly. We do the updates based on the information provided by you. However, you must keep us informed about all updates regarding these accounts, and we will take the required action.

### How to inform Kinum about any updates/payments received for an account?

If you have received the payment from the debtor directly, then use the green “**Payment**” button as described on Page 2 to inform Kinum of the amount you have received, otherwise our collection demands to the debtor from our debt collectors will continue. Kinum is legally entitled to their share of all payments received when the account is in Step 3, even if the debtor pays you directly.

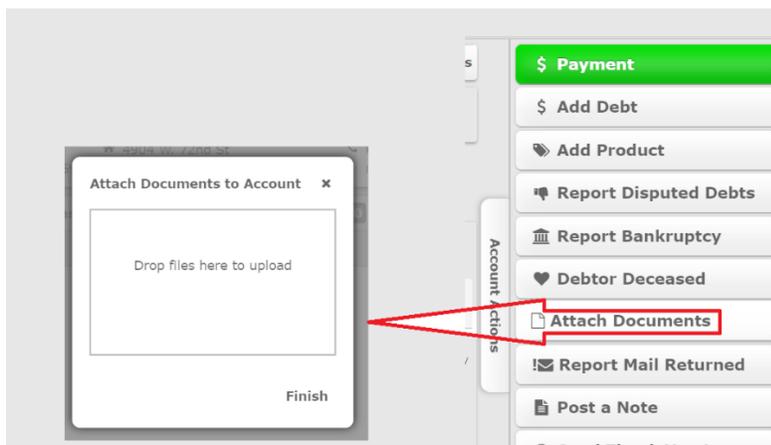
To inform us about anything else regarding an account (like Payment plan, Disputes, Bankruptcy, Contacts made by debtor with you, etc.) use the “**Post a note**” button mentioned above (on Page 2).

## 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.



## **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.

<b>Standard Clients :</b>	<a href="https://kinumorders.com/new/Upload_Step_3_Only_Standard.xlsx">https://kinumorders.com/new/Upload_Step_3_Only_Standard.xlsx</a>
<b>Medical Clients :</b> ( with patient's information)	<a href="https://kinumorders.com/new/Upload_Step_3_Only_Medical.xlsx">https://kinumorders.com/new/Upload_Step_3_Only_Medical.xlsx</a>

**What about the Address field:** Whatever is the last known address/phone of the debtor, that comes in the Address fields. We run a Skip Trace to find the latest contact information of the debtor 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).

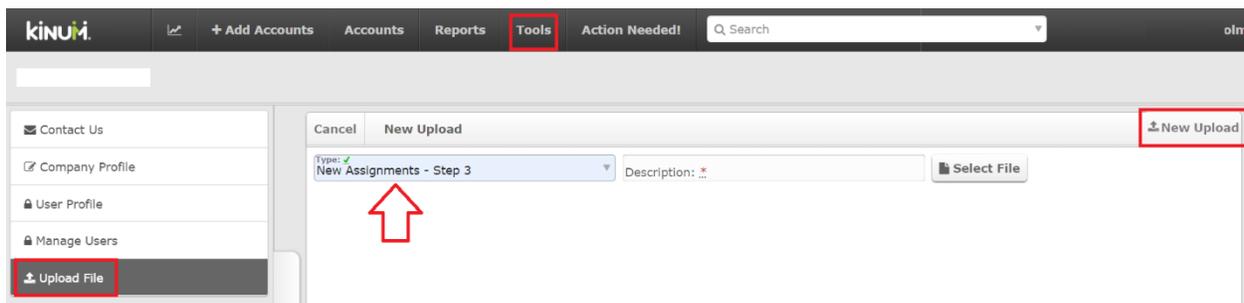
**The "Contact 2" fields** are for the Cosigner / Guarantor's information, it is optional.

**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 3" (Important) >>**

Type something like this in Description box - "20 accounts for Step 3" >> **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