

## A Simple Client Portal Tutorial – Step 3 Contingency Collections – (Medical)

Kinum's secure client portal is located at: <https://kinum.lariatcentral.net/login>

Login credentials are provided by your representative after your account setup is complete.

### Submit New Account:

**Debt Authenticity Proof:** You should have documents to prove the authenticity of debt like invoice/signed-contract. Either provide these documents now (**recommended**), or later when requested by Kinum.

Click on **+Add Accounts** on the black tool bar. For regular consumer debt select **Medical Consumer** on left hand side. (For B2B-Business debt select "Standard Commercial"). Select product as **Step 3**. Fields marked with a "\*" are mandatory. All other items are optional, but recommended. Put **Debtor Name**, **Phone**, **Address**, **Amount Due**, **Payments received**, **Date of Service**, a brief **Description of debt** and **Attach relevant documents**. Do not add any collection agency fees. **SSN** and **Date of Birth** are optional fields, but they are very useful in collections, give us if you have them. Finally, click the **"Create"** button.

The screenshot shows the Kinum client portal interface for adding a new account. The top navigation bar includes 'Add Accounts', 'Accounts', 'Reports', 'Tools', and 'Action Needed!'. The left sidebar shows account types: 'Standard Commercial', 'Medical Consumer', and 'Standard Consumer'. The main form is titled 'Account Information' and includes the following sections:

- Product:** A dropdown menu set to 'Step 3' with a red arrow pointing to it and the text 'Select the right product'.
- Debtor Information:** Fields for Debtor First Name (John), Debtor Last Name (Doe), Alternate ID (776456), SSN (111223333), and Birthdate (01/15/1990). Red text explains that the Alternate ID is for locating the debtor and that SSN/DOB are helpful for skip tracing.
- Addresses:** Fields for Street Address (123 Main Street), Zip (94928), City (Rohnert Park), Country (USA), and State (CA).
- Debt Information:** A detailed section for patient and treatment information.
  - Patient Information:** Patient First Name (Jane), Patient Last Name (Doe), Name of Provider (Paincare Meta Associates), and Description of Treatment (Treatment for pain and numbness in right foot).
  - Account Number:** A field for the account number.
  - As of:** A field for the date of treatment (06/01/2021).
  - Amount:** A field for the amount owed (1000).
  - Interest Charged:** 0
  - Fees Charged:** 0
  - Payments:** 200
  - Am't-Int+Fee-Credits:** 800
  - Date of Delinquency:** 09/01/2021

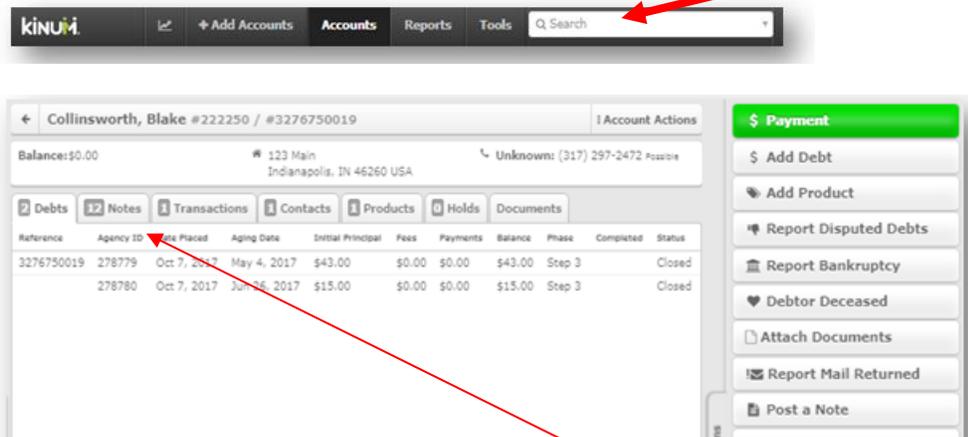
Red annotations provide additional instructions:

- A red box around the 'The total amount of the debt is now:' field is labeled 'Payments they made to you.' with an arrow pointing to the 'Payments' field.
- Text next to the 'Date of Treatment' field states: 'Date of treatment and the amount they were supposed to pay you. (Do not include any payments they made you in this box. That will be entered below.)'
- Text next to the 'Date of Delinquency' field states: 'Date on which you were supposed to get paid, but they did not pay you.'
- Text next to the 'Description of Treatment' field states: 'A brief description of the service provided. Our debt collectors may need it if questioned by the debtor. Any insurance payment, or if it was declined?'
- Text next to the 'Patient First Name' field states: 'If patient name is different from debtor name. Ex if patient is minor'

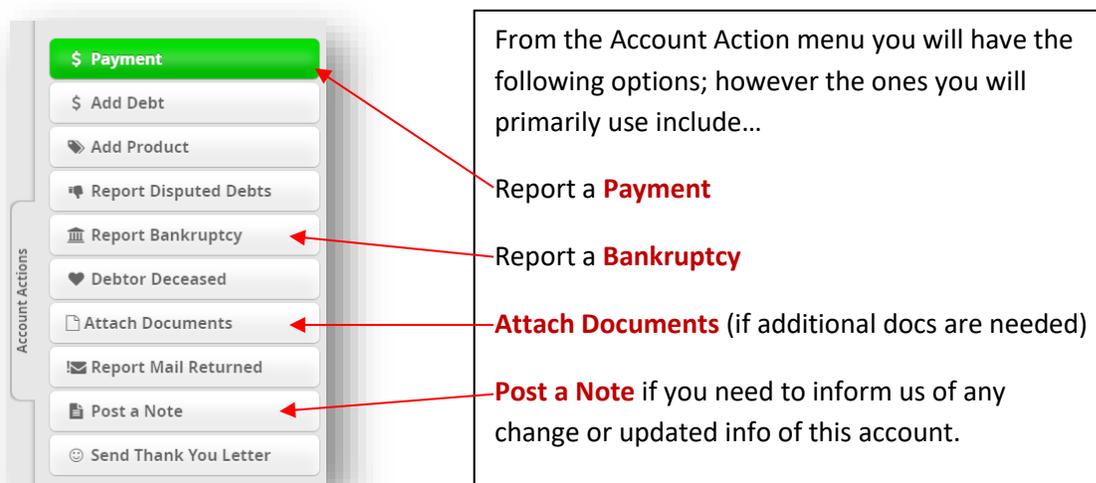
At the bottom of the form, there is an 'Attach Documents?' section with a 'Select files to attach' button. A red box around this section is labeled 'Attach documents which prove that debtor owes you money. (Signed document, invoice, etc.)'. Below this is a 'Create' button with a red arrow pointing to it and the text 'Once all required fields / other information is filled, press the create button'.

## Reporting Payments or Adding Notes for an account

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 debtor first name and the account will appear. Click on it.



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).



Once an account is assigned to Kinum, if a debtor contacts you directly, they should be referred back to Kinum at **1-888-281-1750**, even they agree to make payments. However, if you still receive a payment directly from the debtor then inform us promptly, use the green **“Payment”** button. Otherwise, our demands to the debtor will continue. To inform us about anything else regarding an account (like Disputes, Bankruptcy, Contacts made by debtor with you, etc.) use the **“Post a note”** button mentioned above. Accounts that are in submitted for Step 3 Contingency service cannot be self-stopped by you as Kinum controls the process. However, you must keep us informed about all updates regarding these accounts, and we will take the appropriate action. Kinum is legally entitled to their share of all payments received when the account is in Step 3 contingency collections, even if the debtor pays you directly.