

A Simple Client Portal Tutorial – Step 3 Contingency Collections- (Standard)

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 legitimacy of debt like invoice/signed-contract. Either provide these documents now (**recommended**), or later when requested by us.

Click on **+Add Accounts** on the top. For regular consumer debt select **Standard Consumer** on left hand side. (For B2B debts select "Standard Commercial". For medical debts select "Medical Consumer". For medical debts, if your patient is a minor, enter his parent's/guarantor's name as the debtor name.). Select product as **Step 3**. Fields marked with a "*" are mandatory. 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 to amount due. **SSN** and **Date of Birth** are optional fields, but they are very useful for us, give us if you have them. Finally, click the **"Create"** button.

KINUM + Add Accounts Accounts Reports Tools Action Needed! Search

Consumer Non-Medical Product: DEMO Step 3 *Select the right product*

Standard Consumer **Account Information**

Standard Commercial Debtor First Name: John Debtor Last Name: Doe Ini: Doe

Alternate ID: 776456 *Alternate ID is your own internal account number to help you locate the debtor (optional)*

SSN: 111223333 *SSN and DOB are helpful for Skip Tracing purpose and Credit Bureau Reporting (optional)*

Birthdate (MM-DD-YYYY): 01/15/1990

Addresses

Street Address 1: 123 Main Street

Zip: 94928 City: Rohnert Park Country: USA State: CA

Debt Information

Description of Service: Fixed Railing *A brief description of service that was provided to the debtor. Our debt collectors will need it if questioned by the debtor.*

Account Number: *Your internal account number, you can leave this blank.*

As of: [Debtor Name] owed: *Date on which you provided service to the debtor.*

Between 04/01/2021 and today: *Amount that was owed on the Date of Service. Do not include any payments here, we will ask for that below.*

The debtor was charged this amount in interest: 1000

The debtor was charged this much in fees: 0

The debtor paid or was credited this amount: 200 *Total payments they have made till now*

The total amount of the debt is now: 800 *Kinum will perform debt collection on this amount.*

Same as date of service

Date of Delinquency: 09/01/2021 *Delinquency date is when they defaulted, or missed the payment*

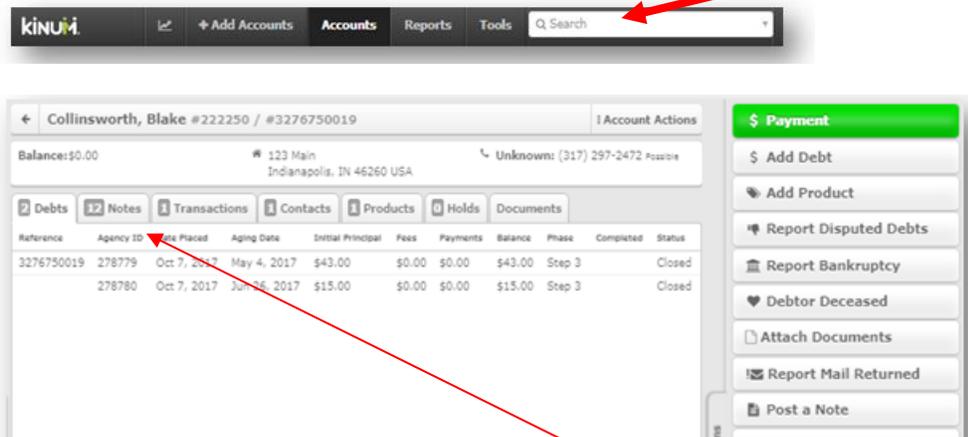
Attach Documents? *Attach documents which prove that debtor owes you money. (Signed document, invoice, etc.)*

Select files to attach

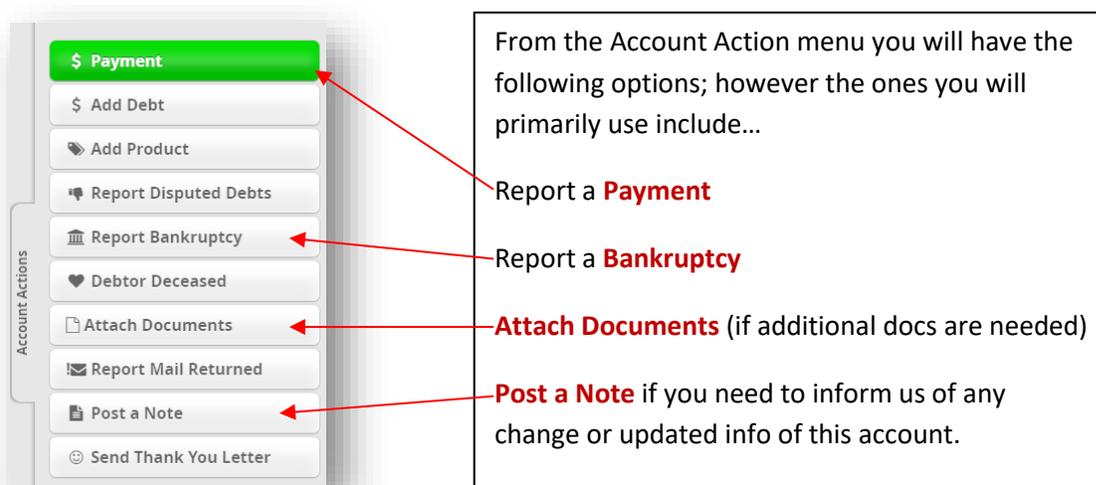
Create *Once all required fields / other information is filled, press the create button*

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.**

ACCESS MONTHLY COLLECT STATEMENT

- Click **Reports** top left
- Click **Statements and Invoices** on the left panel
- Click on the most recent month at the top right with **Month name** and **\$XX,XXX.00**
- A panel on the right appears, *only* click on Download or View

- Collection Statement - NET
 - [Download](#) [View](#)
- Payments collected by Kinum from debtors are sent to you around 15th of the following month (minus the Kinum's contingency fee). If you received any payments directly from the debtors, Kinum will send invoices to you for our portion. Kindly visit the Statements/Invoices section regularly.

ADD BACK UP DOCUMENTS

- Did you receive an email from Kinum stating: “**Dispute Received - Provide Documents**”. Debt verification documents include signed contracts, scans of ID, itemized statements, and invoices as well as any other documentation to support the identity and current balance for the account.
- Type Kinum number into , give it a moment, click on name in blue background
- Click **Attach Documents** on the right, follow prompts
- Click **Post a Note** on the right and type “**Backup docs uploaded, please continue to Collect**”

ADD ACCOUNTS IN A BATCH - UPLOAD USING EXCEL FILE

Download the following sample excel file depending you are Medical Client or Standard Client. Fields in red are mandatory. Delete the sample data and fill your own. **Contact your Sales Rep before using this feature.**

Standard Clients :	https://kinumorders.com/new/Upload_Step_3_Only_Standard.xlsx
Medical Clients: with patient's information	https://kinumorders.com/new/Upload_Step_3_Only_Medical.xlsx

- Click on **Tools** at the top
- Click on **Files/Documents** on the left.
- Then Click on **New Upload** on the far right
- Click on **Select Files to Upload** , select file with your data, and name it
- Click on **Upload** on the far right. Loading these accounts will take about 1-2 business days.