



## **Monthly / Daily Instructions for using Medent interface for Transworld Systems**

**Follow these steps weekly, 1-2 days before running statements.**

### **Step 1 Run the collection report to identify who needs to be sent to TSI**

From the Medent main menu...

Select - Day sheet + Reports

Select - Collection Report

Follow the prompt to set parameters for the report. You do not need addresses on this report, as this will waste paper & take more time to print. (See enclosed specs)

### **Step 2 Assign the selected patients to TSI**

- a) From the Medent main menu lookup the patient using patient name or number from report
- b) Add TSI as a new insurance on the patients account.
- c) When it asks "Do you want to move open non assigned charges to Transworld?" say yes.
- d) When it asks "Do you still want to allow appointments to be scheduled?" say yes.
- e) Click back to the patient lookup and repeat for all patients you wish to assign.
- f) Go through the delinquency report & assign TSI to all accounts to be sent.

### **Step 3 Run the interface to prepare accounts to be sent to TSI**

From the Medent main menu...

Select office tools> interfaces > Export to collection agency >

Then select the second option to "search for all records", this will pick up all the accounts you selected in step 2 and assign a claim date.

**NOTE:** If for any reason you need to resubmit claims here's the process: Go to Billing, Choose Resubmit Options, Resubmit Collection Agency Interfaces, Resubmit Transworld. When it asks if you want to resubmit all claims say NO, then select a date range for Transworld for the claims you want to resubmit. This process will remove claim dates for all accounts found so you can then repeat the "search all" process and create a new file.

### **Step 4 Transferring the file to your PC for upload to TSI**

From the Transworld menu, select the option "Transfer collection file to your PC Hard Disk".

When saving the file you will be asked to choose an encryption method. You MUST choose the last option for uncompressed / unencrypted. This is the only format that will work, as we do not use Medent's encryption method. We automatically encrypt the file when it is uploaded through our client portal.

Next you will need to specify where you want to save the file, we recommend saving it to the desktop. By default it will save the file as credit.txt for new accounts. The system will overwrite your old file every time you create a new file by default; however you have the option to rename the file to preserve it if desired. If you wish to do so, simply use the date at the beginning of the file name. For example, rename credit.txt as "tsi081115.txt" or the file name of your choice.

When it asks if you want to "Remove Collection file?" Say Yes.

### **Step 5 Uploading your files to Transworld**

**Note: Your browser must ALLOW popups to be able to access this feature.**

- a) Login to MyTSI at [my.tsico.com](http://my.tsico.com) with your user id and password. If you don't have this info, contact your TSI representative.
- b) Select "**Profit Recovery or Accelerator**" from the left menu.
- c) Next click "Upload Debtors" and a new window will appear.
- d) Click the "browse" button (called "Choose File" on a Mac) - and select the file from your hard disk. Start files are credit.txt by default.
- e) Click the upload button (to the right of the browse button) to move file to TSI for secure handling and the first few records will be displayed.
- f) Click the Blue Continue button.
- g) Click the Blue Validate button.
- h) Click the Blue Submit button and your done!

### **Step 6 Posting payments & Notifying TSI to stop service.**

Post your payments to Medent as usual, making note of accounts that are out to TSI and what action you wish for us to take on the account. (Paid in full, partial, suspend, etc.)

### **Enter payments directly on the Transworld Website (OCP)**

You can post payments online at [my.tsico.com](http://my.tsico.com) if have a user name and pass code. After logging in, click View/Stop debtors from the main menu and select the account you wish to update. Scroll down to the bottom and choose the appropriate payment option. Contact your TSI rep for details, or call TSI client support at 888-446-4733 x1 (10am-8pm EST) for help with the OCP.

If you have any problems with this process call Medent support at 315-255-0900, or contact your TSI Representative for help.

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# Medent collection report parameters for "Profit Recovery"

## Reports> #4 collection report> #1 Collection report

(Please run exactly as indicated in these specs)

From date personal	yes	Print or Display	P
More than how old	60	Insert 5 blank lines	N
Less than how old	MAX	Include RP address	N
Minimum amount del.	30	All Acct types	Y
Maximum amt del.	MAX	By location	N
Create dunn letters	NO	By doctors	N
Print in dunn order	NO	Print notes	N
Skip if letter in	Skip	Note cat.	
Personal chg + pay	Yes	Types of notes	
Skip if payment in	60	Num notes	
Report or labels	R	Show only accounts with notes?	No

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