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October 29, 2014 – Client names for IVR.

In 4.1, we created a new field for client name in the queue file. This field was not being updated using mixed case, which produces better results. This has been changed.

Note : This new field must be used in IVR scripts when updating from RMEEx 4.0, which uses a different field for client name. Clients must contact Quantrax if this field is used in scripts.

October 29, 2014 – User defined windows

The client override is now active for electronic loads. The client template will be used if it has been set up.

October 30, 2014 – New UB04 and 1500 screens.

Changes were made to handle problems with updating of data.

October 30, 2014 – Preview/Power calls.

An issue with current time calculation was handled. You could get a message that it was too late to call when this was not the case. This only affected users who were hosted.

November 01, 2014 – New fields for debt purchasing or billing company collections.

Two fields, 'Date opened' and 'Charge off date' have been added to the "Additional acct. info" on the Tab-Q option. These fields are stored on the account master. There is no way to add these through electronic loads or I-Load at this time. This will be available in a future release. We will need custom code to add this data to new accounts.

November 03, 2014 – Additional phones (Tab+)

A rare problem with changing the Tab+ information on an account (disabling the number) and the account detail information on a link not being removed, was addressed. This is a very rare situation that was not reported by a user but discovered at Quantrax and addressed. The circumstances are as follows. You are on an account that has a phone number in Tab+. That number is not on the account detail screen. There is a second linked account with the same number in the account detail screen and Tab+. You disable the phone on the first account from the Tab+ screen. The Tab+ on the second account will go to lower case, but the phone number does not get deleted from the account detail screen.

November 03, 2014 – Phone number 555-888-8888.

This is a special number that indicates that the consumer should not be called at the home, work or cell. The special number was designed to stop the introduction of new numbers into those specific phone numbers. To further support those objectives, users defined as collectors, will not be able to remove these special numbers from an account.

November 04, 2014 – Create a new company

The below has been added as a 1 time program to create a new company:

It is accessed by going to a command line from ANY company and menu and keying in CALL COPYMX

You will be prompted to key in:

the company code that you want to copy the system controls from and the company code you want the system controls to be copied to

All the following System controls will be copied:

- Client master
- Collector master
- Legal files
- Special letter formats
- Collector work groups
- Letter translation tables
- Account linking parameters
- Medical billing options
- Balance types
- Payment arrangements
- Adjustment Codes
- QCat codes
- Account status codes
- ACat codes
- Smart Code Series
- State options
- Rules for duplicate accounts
- Location codes

NOTE: Use this feature with extreme caution as it will overwrite (replace) ALL of the above System controls within the new company.

November 04, 2014 – Abnormal exit note

This has been moved to the audit notes screen for new notes added.

November 25, 2014 – New fields to write off balance

The system has allowed you to write off a balance at the system control level for adjustment codes for some time now, however this was only designed for manual payment entry. We have added a new feature to page 6 of the smart code that will allow a user to automatically adjust off all existing balances on an open account, closing it with a close code 1 (Paid in Full). To use this feature go to page 6 of the smart code and enter a "Y" to Write off balance and select the balance adjustment code that you want the system to use for the transaction (41-49). The system will use this adjustment code to create a separate transaction in the payment history file for each balance type.

Write off bal-Y	<input checked="" type="checkbox"/>	Code (41-49)	<input type="text" value="42"/>				
Add payment code	<input type="checkbox"/>	Balance type	<input type="text"/>	Adj.code	<input type="checkbox"/>	Amount (optional)	<input type="text" value=".00"/>

Please use this feature with CAUTION!

Quantrax recommends you use selection criteria within the Smart code to select the accounts based on current account balance and use the feature "Do not allow if no decisions are met (Y)". This is especially important if the Smart code duplicates.

December 02, 2014 – Smart code program terminating during the day

From within I-Tel's campaign manager, when you selected the configuration option and then the rebuild feature, it is possible that the smart code program would be canceled. This has been addressed.

December 02, 2014 – RMEEx refresh

A new refresh of SAVFRMXB and SAVFRMXF has been loaded to the FTP for RMEEx 4.1

December 15, 2014 – Smart code - Percentage of primary

You have been able to add a payment transaction (balance adjustment or other codes) though a smart code. We can bill a client too. You can specify an amount in the smart code. What if you want to bill a percentage of primary? This is now accommodated. There is a new "Percentage of primary" on the same screen. If you enter a number, it will be used to compute the amount of the transaction. If you enter an amount AND a percentage, the amount will be treated as a "maximum". You can use this to say, "Charge the client 3% of the primary balance, but charge no more than \$10".

Note: For this option to work you should not apply the smart code through the smart code window or events. Instead, this smart code should be applied by the system.

December 17, 2014 – Tab+ masking

In some cases when a number was masked, numbers following that number were incorrectly masked. This has been addressed.

December 17, 2014 – Merge code

Merge code A93 (CLIENT ACCOUNT NUMBER (ALL 25 CHARACTERS)) was printing the last 7 characters incorrectly. This was corrected.

December 18, 2014 – New refresh for 4.1

A new version of RMEEx 4.1 SAVFRMXF has been loaded to the FTP from today.

December 19, 2014 – Data extract - Payment

We had recently provided a 'frequency' option to make data extract even more flexible. The data extract for accounts and payments can be run on a specific date that is given in the first screen, and it will automatically change the next run date according to the frequency.

What about monthly and annual payment options?

To run the data extract process for these you still needed to update the payment date range every month. This needed to be done automatically so we have now addressed the issue.

We have added a new field 'Use calendar for freq. M,A (Y)'.

A 'Y' in this field will calculate the payment date range for the monthly and annual options.

The date range selected is always the start day for the period (the 1st of the month or year) and the end date of the period (the last day of the month or year).

Example:

You want to produce a file at the beginning of each month and include payments from the previous month.

Let us assume that you are setting up the payment extract on the 15th of July and you want the first payment extract created for July (070115 to 073115). Even though the month is over on July 31st you would want to run this option during nightly processing, the first time that the next work date was on or after August 1st.

Put an "M" in the field "Special frequency (D,M,A)"

Put a "Y" in the field "Use calendar for freq. M,A (Y)"

Put a start date of "073115" in the field "Start date". Note that the start date should always be the last day of the month and not the beginning of the month.

When the next work date is on or after 08/01/15 the nightly will run the process and include payments for the period 07/01/15 through 07/31/15.

On the next work date of 09/01/15 the nightly will run the process and include accounts for 08/01/15 through 08/31/15 etc.....

The system will keep changing the payment date range each time the next run date is updated.

December 20, 2014 – Change to Account processing

We have made changes to the launching of phone calls from accounts where numbers are masked. Calls can now be launched from the account detail screen or from the other phones screen (green screens or GUI). If a number on the account detail screen is attempted, and it is masked, the user will get a message:

SC-4041 Phone Number restricted-no calls

On the other phones window, the field that is used to initiate a call (using a .) will be protected. If you use the option where you can key in a number to be dialed, that number will be checked against the home, work or cell. If the number is on the other phones list, the user will get the message:

SC-4054 Number is on other phones

and will have to dial the number from that screen.

December 23, 2014 – Account inquiry

For the name search, you could further narrow the search by specifying a client code, group code or balance in the field titled X). We have added a new option to narrow the search by consumer DOB. Use D-xxxxxx (e.g. D-010465) to search for a specific DOB. As with the other searches, you may not get the desired results if the search is too broad. If you are searching for Jason Smith with a DOB of 010465, searching for Smith Jason, with D-010465 is better than looking for only the last name Smith with D-010465. The latter may not find the accounts.

December 28, 2014 – Direct checks

An issue with the direct check extension was recently reported. We have been able to identify an issue with the direct check extension.

Currently: When a user takes the option of extended direct checks past the 11 we currently allow, the system will calculate the remaining balance and add the payments required to pay in full the account. This has been in use for many years, without a single complaint. Through detailed research we have discovered that an extra payment may be included in the extension. The system looks at the remaining balance, but does not include the pending payment when calculating the extensions.

We believe this issue has gone undetected for many years because of one or all of the reasons listed below.

- Clients are not allowing extended payment arrangements to be auto set up.
- Account balances are ending in rounded number – ie: 200.00 balance, 10 payments of 20.00 pays the account off. Nightly will then remove the additional payment and close the account PIF
- Possible custom mods and/or direct check interfaces

We have identified the issue and have made changes to consider pending postdates, when extensions are calculated. The previous extensions will continue using the same code.

The changes have been completed for v4.1. You will need a refresh/upgrade to receive these changes.

If you have custom code for your direct checks, you will need to send in a project request to have your custom code updated with these latest changes.

It's important to note that we process thousands and thousands of payments daily, don't panic, we believe this issue to be very infrequent and will address timely. Please check the PTF log (current version) for updates.

January 13, 2015 – Bankruptcy Date

The following dates were stored with the incorrect century when the date year was before 2000. Eg: 1998 was stored as 2098.

Date filed
Notification date
Bankruptcy date

We have corrected this and going forward the century will be stored in the proper format when date year is before 2000.

January 16, 2015 – Account load edit for electronic loads

We have modified the calculation for consumer age when 'Consumer is younger than 18 years'.

January 21, 2015 – Collector Comparison - Monthly New Business

We have discovered a problem in the new business numbers month and year to date on the collector comparison report. (Collector Comparison - Monthly new business) This is not a report that is widely used and should not affect most of you. These numbers are not getting reset at the end of each month and year, and may show very high numbers based on a recent change to accommodate larger numbers. We have corrected the code. The problem is corrected by downloading the latest changes for RMEEx 4.1. After the changes have been installed you can do the following from a command line. It will correct the data. If you are hosted, we will run this for you.

Key in

CALL ZFIXNB#

Press ENTER.

When the job has completed, the data will be corrected.

January 24, 2015 – Smart Codes.

Smart codes can remove phone numbers (Clear phones (H,W,C,B,O,A)). We believe that the number was being removed from the account detail screen, but not the other phones screen (Tab+). As a result, these disabled numbers would re-appear on the account detail screen. This has been addressed in RMEx 4.1 and 4.0. (ACTCO1)

January 28, 2015 – Changes made to Smart Codes needed for both Smart Code and account audit

There are two places within the system that allow you to check for the existence of a Smart Code by reading the account history notes.

- The Smart code (page 5) feature "Smart Codes needed"
- The Display accounts for audit features on the second screen, "Smart Codes needed" and "Smart Codes NOT needed"

This change will allow these features to also check the archive notes for the selected Smart Code(s).

January 29, 2015 – Scripting

There is a method of allowing the user to use command keys 1 through 6 to within a script. This can apply other smart codes and display additional screens. We have added a field to the company options – 'No ENTER or F7 if special smart codes exist (N,B)'

If any of the 6 smart codes are defined on the script, you have the option of saying "the user cannot use ENTER or F7 and get out of the script." They MUST use one of the function keys. Use "N" to disallow the ENTER key and "B" to disallow both the ENTER and F7 keys. If the user presses those keys when they are not allowed, the same screen will be displayed.

February 12, 2015 – Description codes "Allow access if special authority is at least"

Access to accounts can be restricted based on description codes. You go into the system control file for description codes and set up the "Special warning message". At the user level (system security), the field "Allow access-special desc.code (Y)" allows you to grant access to these accounts, based on the user. We have added greater flexibility to this option. We have added a new field "Allow access if special authority is at least". This relates to special authority on the system security and allows you to set up user levels (e.g. management) that can access accounts that are usually protected based on description codes.

February 24, 2015 – Purge by client

On the client purge, the payment date from system controls was not being displayed. This was corrected.

February 25, 2015 – Calling cell phones and other numbers in I-Tel

You can load cells and other numbers into phones 3, 4 and 5 in the queue file for use with I-Tel. In some cases, available numbers were not loaded. The reasons are not easily explained because the problem was random. This has been corrected.

March 02, 2015 – Enhancement to smart codes!

There are instances where a client will place multiple accounts with an agency. You are then allowed to "work" one account and duplicate information across the links. If the user enters a note on one of the links, it must be reflected on the linked accounts too. This can be done by specifying an "A" in the field Duplicate notes (Y,P,A) within the smart codes set up. What if a consumer promises to pay a specific account in full, and the agent keys in "Promised to pay after pay day". This could go on all of the accounts, but it will not be clear as to which account is being paid, if one of the links is viewed. Solution? When user notes are duplicated (Option "A" above), you now have the option to show which account the original notes were entered on! A new field has been added just under the field Duplicate notes (Y,P,A). It is "Show account worked (Y)". When this flag is on, user notes added will be preceded on the linked (duplicated) accounts with a comment in the following format.

Notes added on 000908849

March 02, 2015 – Possible bankruptcy message

When there is an entry in the bankruptcy database and a debtor matches the record we used to present the message "Possible bankruptcy exists". We will now check the multiple 'Co-signer' fields and 'Spouse' fields also.

We have made the following changes. The possible bankruptcy message to the user will now appear as follows. This will tell the user which responsible party was a match:

POSSIBLE BANKRUPTCY (Guarantor)
POSSIBLE BANKRUPTCY (Spouse)
POSSIBLE BANKRUPTCY (Co-signer 1)
POSSIBLE BANKRUPTCY (Co-signer 2)
POSSIBLE BANKRUPTCY (Co-signer 3)

NOTE: The Patient was not included as a responsible party, since Patients can be minors.

This will give you the ability to set up Events (or Smart codes) used by your staff to handle bankruptcies more efficiently.

March 04, 2015 – Changes to Credit Cards processing

There is an option to release payments for future post dates. This had been done for credit cards too. During the process that prints and deletes credit card information, you will be prompted for date. The system date will be displayed in this field. You can leave that date and press F7 to continue. Or change the date and press ENTER. You will then be presented with a screen where you will be asked to re-enter the date. If the dates entered match, this new date will be used for selecting payments. Canceling will use the system date.

March 09, 2015 – Company search

We have added a new feature on the Company Information System Controls to allow you to view a complete list of all companies that have been set up on your database. This option will show the company code, company name and the delete code if one exists.

March 12, 2015 – End sessions for Users

We have a new feature that will end/reset all sessions for collectors. If a user is in the Account Processing menu and takes the option to signoff, they will now be presented with an additional screen titled

Reset an agent

If the agent is experiencing connection issues he only needs to enter a "Y" in the prompt and hit enter

If the agent is NOT experiencing connection issues he only needs to hit exit (F7)

March 17, 2015 – RPC console

In a predictive campaign, we display the number and phone type, if the number is not the home phone. What about preview calls? How does an agent know what number should be called? In an RPC preview campaign, we will perform a similar screen pop with a message that displays the "Number to be dialed" along with the phone code!

March 19, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

March 26, 2015 – Location codes

When there were more than twenty entries the system was displaying the entries incorrectly from the 21st entry for options 3 and 4 (Location code by zip codes and Location code by Area code & NPX respectively). This has been addressed.

March 27, 2015 – Client access by User ID

There was an issue where the system did not pick the value in the third field in 'Client profiles' under Client access by User ID. This was addressed.

March 27, 2015 – Client inquiry screen

The client update screen has always showed all 10 client overrides on page 5 but the client inquiry screen only showed the first 3 client overrides. We have now changed client inquiry to show all 10 client overrides.

March 30, 2015 – Metro2 Credit Reporting

As all of you know when you process your credit reporting files the system will overwrite the existing files. Recently, we have had several incidents where users accidentally took the option twice (maybe they got busy and forgot they had already processed it, etc). If the first file had not been moved, renamed, sent to the credit bureau, etc, the data was being overwritten by the second processing. It is time consuming to try to recover this data.

Even though we have always had a message telling you when the last file was created, many users were not noticing the message.

We have now added an additional warning when processing your credit reporting files. This warning cannot be missed as it prompts you to continue. If in doubt whether it has been processed, just F7-Exit to stop the processing.

We recommend that you always check the option "Credit reporting history" before processing your credit reporting file.

March 30, 2015 – New option for linking

Characters for Cl.Acct# 1-9

This field is ONLY used in conjunction with the field "Client account number" to assign points for linking.

By entering a number 1 through 9 in this field, you can now limit the number of characters the system looks for when assigning points for the Client account number feature.

Ex. Let's say your client is a rehab doctor and only assigns one account number to all of the patient's accounts (acct# 123456), you may be appending the date of service to the client account number to make the number unique. Therefore, the client account number field would not allow these accounts to link because the appended date is not considered a match. But if you put a 6 in this field, the system would only check the 123456 and consider ANY account with the first 6 characters of 123456 as a match, allowing the points to be assigned.

NOTE : The system will only assign points if the accounts have the same client number or client group number.

April 02, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

April 06, 2015 – Data extract

We have changed the selection criteria option 'Phone exists Y,N', the system will now check for the existence of home, work OR cell.

We also added a field for cell phone under 'Field Selection for Data Extract'.

April 08, 2015 – Letters (when promise is greater than linked balance)

When a letter is requested in an account where a promise is greater than the linked balance in standard P/A, non-linear P/A, direct check installments or credit card series the letter will fail with a message 'Prom. or P/A exceeds bal'.

April 08, 2015 – Legal Balance

If a user has no access to legals, legal accounts will not be included in the total eligible balance when a single credit card payment or credit card series is set up.

April 11, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

April 14, 2015 – Nightly Letter Failed Report and Letter Printed Report

The "Run date" has now been changed to reflect the date the nightly was run.
The "Work date" has now been changed to reflect the date last worked.

April 22, 2015 – Linking

A problem with linking when "Description codes to not link" was specified on System Parameters was addressed. The linking program would go into a loop and not complete. This has been addressed.

April 28, 2015 – Changing collector credit

Originally, in order for a user to be allowed to update the F23/F24 option "Change credit (Y)" they needed access to the Payment menu in System Security.

We have changed this. Now the user will only need access to the Payment entry option within the "Areas" section of system security. Payment menu access is no longer required.

April 30, 2015 – Credit Reporting Minors

We have now added an option to the Metro2 system controls to allow you to stop reporting minors "Report minors? (N=No)".

The system will check the consumers' date of birth on the account detail screen and compare it to the last transaction date on the account detail screen. If the age is less than 18 years, the system will flag the account as a "Do not report" on the second detail screen when credit reporting is processed.

NOTE: This only affects accounts that have not yet been reported to the credit bureaus. If the account has already been reported, you will need to withdraw it from the credit bureaus.

NOTE: If the account does not have a consumers' date of birth on the account detail screen, the account will be reported.

May 15, 2015 – On-line Clients

When On-line clients enter Payments these transactions are posted immediately. The system was generating a posting sheet for each transaction. To save paper cost, we have stopped printing these posting sheets and have added a new entry line to the Daily Payment and Payment Summary for Period reports. The line item is - Payments entered by on-line clients

Acknowledgements were not being printed or e-mailed for accounts entered by On-line clients, this has been corrected.

Accounts entered through On-line client were not getting the correct calculation for the Credit reporting eligibility date, this has been corrected.

May 20, 2015 – LetterLogic NCOA Upload

We have added a new field to the LetterLogic NCOA upload interface to handle any special suppression rules you may have with LetterLogic.

Ex. If letter generates on RMEx because the system has a non-restricted state on the account but LetterLogic processes the NCOA scrub and discovers the consumer has now moved to a restricted state. If you have told them to suppress letters based on this circumstance, they will notify us in the file and we will add an "S" to the Return mail flag and allow you to apply a Smart Code/override.

The field is:

Letter did not mail - address suppressed ____ ____

May 21, 2015 – New refresh for 4.1

A new version of RMEx 4.1 has been loaded to the FTP.

May 29, 2015 – Nightly

We have added logic to stop nightly from being scheduled for the future if "Auto-start" is specified, and there is no start time for the night processing. This is not allowed, but we have added the code to handle such a situation.

May 29, 2015 – Payments from all linked accounts

This option is available if you use F20 from the payment history on the account details. This program was designed to display one line per payment type per date, by combining information from all of the linked accounts. We should not have been displaying secondary balance codes on each line (since they could have been combined), and we should not have been displaying totals by secondary balance. These changes have been made. The program summarizes each payment type per day, trying to give you a picture of the payments and adjustments for each day, based on all of the consumer's accounts.

June 05, 2015 – Stop calls based on the consumer's state

There are features in the system to stop calls based on the consumer's state. These features would remove phone numbers from I-Tel dialer campaigns, based on the rules. There was a bug that would remove those numbers (in the queues only) when an account was in a specific state, and then continue to change accounts that should not be changed. This has been corrected. (Program ITMAXCE)

June 10, 2015 – Data Extract – Account master

When selecting accounts from the Account master using Data Extract you are required to enter either a client, owner or worker selection criteria. When creating Forwarding agency files you may not need any of these three required fields. We have now added the ability to select accounts based on a Forwarding agency code without requiring a client code, owner or worker code to be entered.

June 20, 2015 – I-Tel hunt groups

Hunt Group Copy option

When you copy a Hunt Group the system will now also copy all the associated members. Please remember to check the members for any changes you may need for the new Hunt Group.

Hunt Group Members change option

You now have the ability to change any and all fields on this screen before update.

July 02, 2015 – Smart code feature - Transfer to company ___ Transfer to client _____

There was a very unusual issue discovered and resolved:

If you are transferring an account from one client code to another, the century on the consumer's date of birth was sometimes changing from 2000 to 1900. The reason this could happen was:

- The century is stored in the Insurance screen
- The century was not transferring ONLY in the case where insurance information did NOT exist in the insurance screen

If you use the Smart code transfer features, we recommend you do a refresh of or upgrade to RMEx v4.1

July 03, 2015 – Purge

A rare problem with the purge was resolved. If a selected account had exactly 999 notes, the purge would go into a loop and stay indefinitely "suspended". This was resolved.

July 07, 2015 – Dashboard

We have made a change to the GUI executive dashboard to show Fees. The dashboard will display the column for 'Fees' unless the field 'Omit comm% from coll.screens (Y)' is set as 'Y' under system parameters.

July 10, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 11, 2015 – Bankruptcy Warning Message

If a match was found in the bankruptcy database for an account, the warning message was NOT appearing to the User in account processing. This has been resolved.

NOTE: This did not affect account inquiry. The warning was appearing if the account was accessed through account inquiry.

July 13, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 14, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 15, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 20, 2015 – RPC Console

The RPC console gets the next number to call as soon as the current call is completed. After a RPC, we stop the process of getting more numbers to be called for the rest of the day. How do we know there was a RPC? The agent must tell us that. Typically, with a RPC, the agent would enter at least ONE smart code that is defined as an RPC, before the call ended. What if the agent waits until the call is over to enter that smart code, or the consumer hangs up before any smart codes are entered? The system would immediately fetch the next number and the consumer could receive another call in the next few minutes! We have added code to intelligently delay the number being called and give the agent time to enter a RPC smart code.

July 20, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 22, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

July 23, 2015 – On-line client

We have made a change to not display or allow input to the "Collection Costs" field on account entry for on-line clients, if the field on the on-line client set up 'Balance type for costs 1-9,0' is not 1-9 or 0, the collection costs option is not displayed or allowed to be accessed.

July 23, 2015 – Data Extract

We had recently provided an option to update the payment date range every month automatically and now we have added this feature to update 'Closed date range' automatically for accounts (Data Extract Options Menu > Opt 1. Create or update data extract selection).

We have added a new field 'Use calendar for freq. M,A (Y)'.

A 'Y' in this field will calculate the closed date range for the monthly and annual options.

The date range selected is always the start day for the period (the 1st of the month or year) and the end date of the period (the last day of the month or year).

EXIT

Data Extract Process - Set Up Selection Criteria

Extract name : AUTOMATIC-MONTHLY

Set up to run in the nightly processing

Daily	(Y)	<input type="checkbox"/>	Special frequency (D,M,A)	M
Monday	(Y)	<input type="checkbox"/>	Number of days for frequency D	<input type="checkbox"/>
Tuesday	(Y)	<input type="checkbox"/>	Start date	073115
Wednesday	(Y)	<input type="checkbox"/>	Use calendar for freq. M,A (Y)	Y
Thursday	(Y)	<input type="checkbox"/>	Next scheduled date	
Friday	(Y)	<input type="checkbox"/>		
Saturday	(Y)	<input type="checkbox"/>		
Sunday	(Y)	<input type="checkbox"/>		

Primary E-mail address

Secondary E-mail address

NOTE: When you are setting up an extract for the first time you will need to update the closed date range in the setup.

Closed date range 070115 to 073115

Example:

You want to produce a file at the beginning of each month and include closed account information from the previous month.

Let us assume that you are setting up the extract on the 15th of July and you want the first extract created for July (070115 to 073115). Even though the month is over on July 31st you would want to run this option during nightly processing, the first time that the next work date was on or after August 1st.

Put an "M" in the field "Special frequency (D,M,A)"

Put a "Y" in the field "Use calendar for freq. M,A (Y)"

Put a start date of "073115" in the field "Start date". Note that the start date should always be the last day of the month and not the beginning of the month.

When the next work date is on or after 08/01/15 the nightly will run the process and include closed account information for the period 07/01/15 through 07/31/15.

On the next work date of 09/01/15 the nightly will run the process and include accounts for 08/01/15 through 08/31/15 etc.....

The system will keep changing the closed date range each time the next run date is updated.

July 27, 2015 – Smart codes

An issue in smart codes setup was recently reported.

In '+' additional actions if you hit F22 and view additional smart codes to apply and once back to the prior screen and then hit F12 to update it gave an array index error. This has been addressed in RMEEx 4.1.

July 30, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

August 05, 2015 – RPC

We have had an issue before where the same number was dialed multiple times in predictive campaign and it was fixed. It seems that this occurs in progressive campaign as well. We have addressed this issue in both predictive and progressive campaigns.

August 14, 2015 – Data Extract

We have added a copy feature to data extract. If you need to create a new data extract similar to an existing one, you can simply copy the information from the existing data extract and then make the necessary changes to the new one.

We have made another change. You cannot create a data extract with same name in both normal and payment extracts.

August 14, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

August 17, 2015 – I-Load

We have added a new warning for users when processing I-Load new business formats. If the user has an unposted I-Load batch and they try to process a different new business format (3. Load New Business), they will now see the following warning:

'A batch exists with unposted records. Post or clear the batch before proceeding'

User will have to post or clear the batch before they can proceed.

Account Load Posting:

If a file contains the same phone number to be loaded into more than one of the phone fields on the account detail screen, the system will now delete all but one of the numbers. The numbers that get deleted will be determined in this manner:

- If same number is loading to the home number field and any of the other 2 fields, we will retain the number in the home number field and delete the number from the work and/or cell phone fields.
- If same number is loading to the work number field and the cell number field, we will retain the number in the work number field and delete the number from the cell phone field.

Your cell scrub will handle cells from there

August 18, 2015 – Letters

From the Sys Control Menu, option 11 “Letter Codes” - when you exit, the system presents a screen “Letter request options”. This is where you can tell the system to send a first letter on an attempt, contact, or other action. This option allows you to check up to 5 letter codes. It is very possible that you could have many more letters that are first letters.

We will also check the Letter Codes file to determine if a letter that is designated as a “First letter” has been sent. We will check the letters codes for first letter Y or L. a "Y" means this is a first letter. If one of those letters has gone out on the account, we will not request a letter. For “L”, we check the links and see if one of those letters went out on that or a linked account placed on the same date for the same client. If so, nothing goes out.

August 19, 2015 – Special financial information supplied by clients and needed on letters in certain states

Some states (New York needs some of this today) require some special financial information on letters. This is information supplied by your client at time of placement, but not usually required for collection activity. You can now load this data into a User-defined window. The window is specially formatted; because, we want to always load the same information in the same place, to help with letter-generation and decision-making. As a start, we have added the following fields:

- (Line 1) Charge off amount
- (Line 2) Charge off principal
- (Line 3) Charge off interest
- (Line 4) Charge off late fees
- (Line 5) Charge off Other fees
- (Line 6) Charge off court costs
- (Line 7) Int accrued since charge Off
- (Line 8) Fees accrued since charge off
- (Line 9) Post charge Off interest rate
- (Line 10) Total post charge Off Pmts
- (Line 11) First Pay default typeID
- (Line 12) Total credits since charge off
- (Line 13) Total debits since charge off
- (Line 14) Total Fin,Charges since C/Off
- (Line 15) Settlement amount
- (Line 16) Settlement date
- (Line 17) Original creditor
- (Line 18) Open creditor
- (Line 19) Charge off creditor
- (Line 20) Charge off from date
- (Line 21) Charge off to date
- (Line 22) Original creditor Address 1
- (Line 23) Original creditor Address 2
- (Line 24) Original creditor C/S/Z

If you need to load any of the above given data through a new business load, you need the following.

Step 1: Create a UDW code and add that code in field ‘User-defined window code for financial information’ under System Parameters.

Step 2: Provide us the fields that’s needs to be loaded to the UDW through the NB load.

NOTE: We recommend creating a UDW code between 51 – 99 since these windows cannot be edited by users.

Our programmers will check the fields in the new business file, and match them to a specific line item on the field list. We will then format the title and amount, with the amounts (or dates) always being in the same positions on the screen.

In most cases you will not get all the fields mentioned above in the file... As stated before, we will only write the available fields into the UDW based on the order given above. For instance if the input file contains only the first four and the last two titles in the file, we will write the first four and leave the next 15 lines blank and write the last two in the 20th and 21st lines of the UDW respectively. This is done for consistence, and purposes of saving space. Note that this data will DISPLAY on consecutive lines on the UDW screens, even though they are stored on specific lines and there are gaps in the record sequence.

The following points needs to be considered when you consider the information being added to the UDW.

1. The titles will be loaded from position 1 - 30.
2. The data will be loaded from position 32 (right justified for numeric fields and left justified for alphanumeric fields).
 - a. Amounts - Right justified (no commas). Loaded from position 32 - 42 (Position 42 is for minus sign (-) for negative balance.).
 - b. Dates - Will be loaded in MM/DD/CCYY format.
 - c. Interest Rates – Will be loaded with decimal in positions 37-41

NOTE: If you collect in the state of NY AND your client furnishes you with this data, the new business load will have to be custom code. I-Load does not include these features.

We have also given the users the ability to load the Original creditor address using manual accounts entry. The original creditor address that is entered during manual account entry will be automatically stored in the UDW (line 22, 23 and 24 as mentioned above) defined in the system parameter.

August 19, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

August 19, 2015 – Home before work rule

A decimal data error in the mini-server has been addressed. The error would have referred to ITMAXHW1. This program has been changed.

August 21, 2015 – Account list for audit

We have addressed a problem where the account audit, that checks for smart code decisions, was not looking at the decision line for "Phones" correctly. Phones, means home work OR cell. The documentation on the smart codes said home or work. We have changed that to include cell. The audit was not looking for cells, and this has been addressed.

August 25, 2015 – Disaster areas by state and area code

We have a feature in our system to hold the processing of any calls on accounts (home or cell) where the debtor resides in any of the states or area codes that are entered under Disaster areas by state and Disaster areas by area code (Option 4 and 5 respectively when you exit from the state options). We stop the call by not adding these accounts to the work queues.

But how do you verify that the accounts are not in the queue file?

We have added a new option (option 7. Print disaster exceptions from queues) under the State/Area Code Warnings to print a list of accounts that are in the queue file and have a state or area code that is on the disaster definition. Once you run this option a report will be created in the spool with the following information:

Case #

Name (last name of the consumer)

State

Phones (Home and Cell)

August 26, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

September 01, 2015 – Smart Codes

Stopping use of a smart code. There are different methods of stopping a user from applying a smart code on an account. We have added one more. On Page 5 of the smart codes, there is an option

Not allowed (Y,C) To the right of that, we have added a field "D/C".

Entering a description code in that field will tell the system not to allow a user to enter that smart code (through the account inquiry and account processing screens) if that description code exists on ANY of the linked accounts. This could be used to stop a smart code from being applied, if, as an example, the consumer was disputing any accounts or was represented by an attorney on any of their accounts.

In addition to this you can display a special message to the user who is trying to enter the smart code by adding a note using the F6 (SC/Seq Message) and setting up that smart code with an override of *STP (for Stop!) and a sequence of 99.

September 02, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.

September 11, 2015 – Other phones

We have made changes to the other phones screen and account inquiry to delete phone numbers from the account detail screen, when numbers are marked with an "N" for no permission. Setting the permission flag to N will disable a phone number on the "Other phones" screen. When permission codes are changed, accounts are automatically documented.

September 26, 2015 – Medical insurance billing (New ICD-10 coding)

We have updated the 1500 and UB04 entry programs. For discharge dates on or after 10/01/15, you will be forced to use the old programs (ICD-9). After that date, the new programs (ICD-10) will have to be used. For the 1500 screens, the discharge date is taken from the "Discharge date" field. For the UB04, it is taken from the "Statement to" date.

We have also changed Block 38 of the UB04 to print the name and address of the applicable insurance company being billed.

September 28, 2015 – System Note Dates are out of Sequence

There are a few programs in Nightly, that use the time from when the process runs... but uses the "System date" which is the date the nightly was STARTED. Therefore it put in a time of 1 AM for example... with the DATE of the prior day. To handle this, we do offset and make the time 10 PM and reduce 1 from the date!

October 09, 2015 – New refresh for 4.1

A new version of RMEEx 4.1 has been loaded to the FTP.