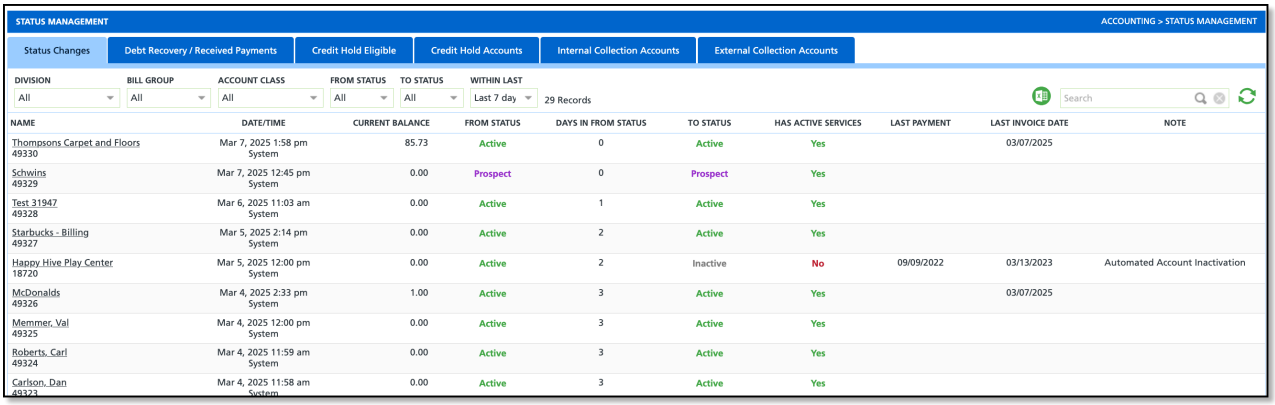
Status Management

Last Modified on 06/25/2026 7:17 am PDT

Pathway: *Accounting > Status Management*

The Status Management screen provides a comprehensive overview of accounts on, or eligible for, credit hold. It includes a series of tabs designed to help you efficiently monitor and manage account statuses, providing better control and decision-making.



Permissions

The following permission is required to view and interact with tabs in the Status Management screen:

Permission ID	Permission Name
263	AR Aging & Status Management

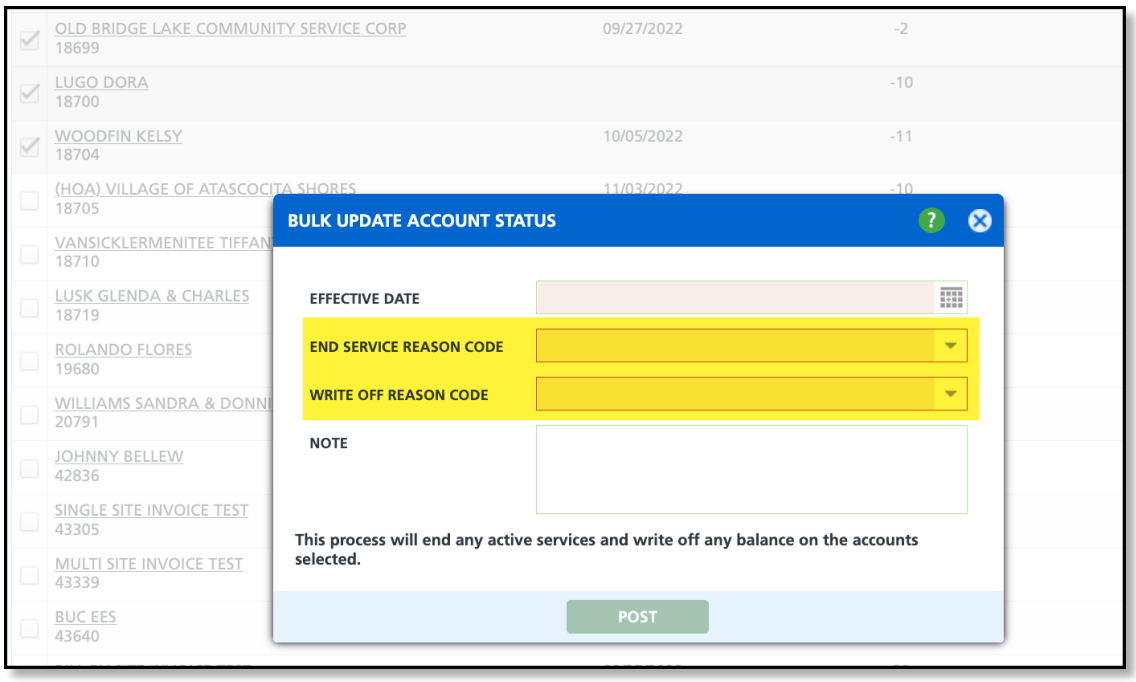
Prerequisites

The following setup requirements are necessary for the status change options:

Reason Code Setup

Pathway: *Setup > System > Reason Code*

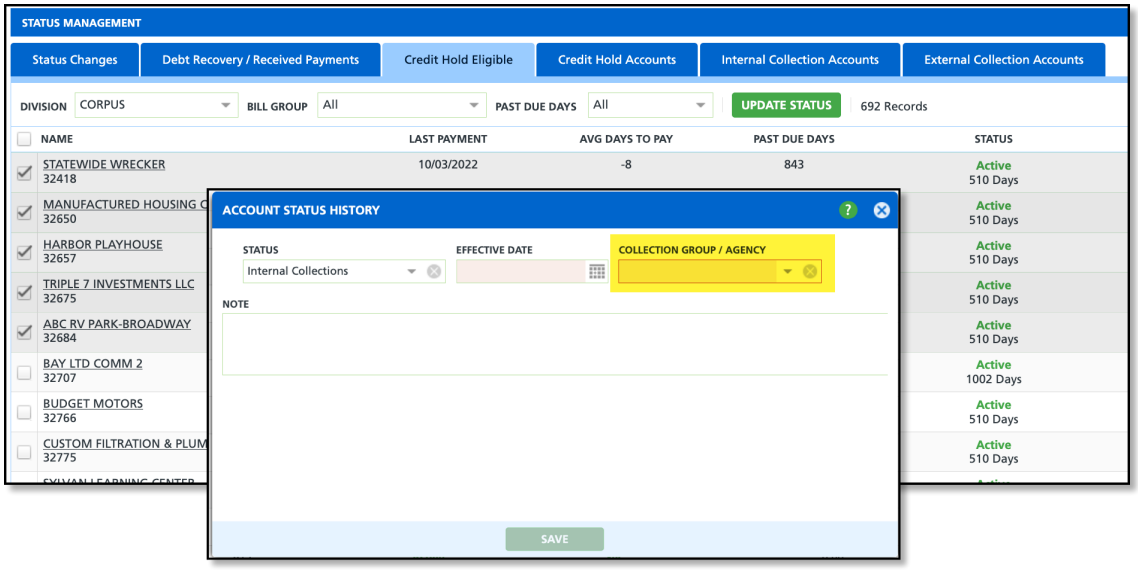
To bulk update statuses, reason codes are required. As shown below, this screen utilizes **End Service** reason codes and **Write-Off** reason codes. For more details about adding and editing reason codes, refer to the Reason Code Setup documentation.



Collection Group / Agency Setup

Pathway: *Setup > Accounting > Collection Group / Agency*

Before assigning an account to an internal or external collection group or agency, review the Collection Group/Agency setup to ensure all available options have been added.



Screen Descriptions

Below are the filters and fields available across the various tabs. Please note that not all filters and fields will be displayed on every tab.

Field	Description	Tabs it Displays On
Filters		
Division	Filters the screen to only display accounts in the selected Division.	All tabs

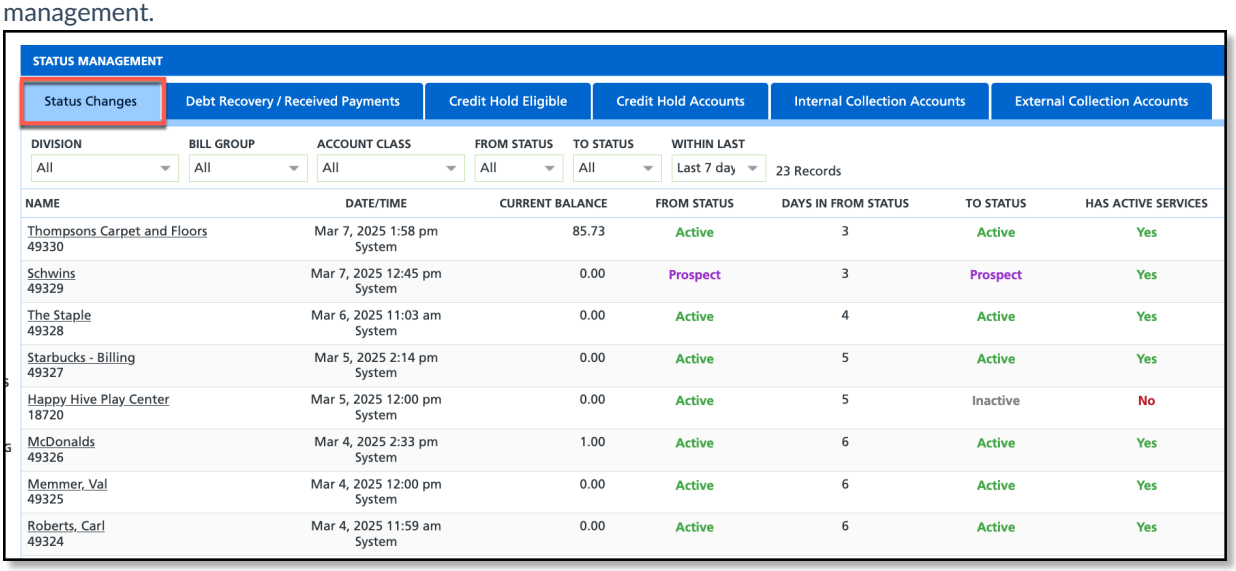
Bill Group	Filters the screen to only display accounts of the selected Bill Group.	All tabs
Account Class	Filters the screen to only display accounts of the selected Account Class.	Status Changes
From Status / To Status	Filters the screen to only display accounts that match the status workflow going from the selected 'From Status' to the selected 'To Status.'	• Status Changes • Debt Recovery / Received Payments,
Within Last	Filters what accounts display on the screen based on the time frame of a qualifying status change.	• Status Changes • Debt Recovery / Received Payments
Collection Group / Agency	Filters the screen to show only accounts for a selected Collection Group or Agency.	• Debt Recovery / Received Payments • Internal Collection • Accounts, External Collection Accounts
Past Due Days	Option to filter the Credit Hold Eligible screen on the aging buckets.	• Credit Hold Eligible
Minimum Days on... (Credit Hold, Internal Collections, External Collections)	Option to filter the screens based on the length of time it has been in a credit hold status.	• Credit Hold Accounts • Internal Collection Accounts • External Collection Accounts
Fields	**Descriptions**	**Screen Tabs**
Name	The name of the account.	• All tabs
Date/Time	The date and time the account's status was changed.	• Status Changes
Current Balance	The current balance on the account.	• Status Changes
From Status	The status the account was in before the most recent status change.	• Status Changes
Days In From Status	Computes the duration, in days, an account has been in the status indicated in the 'From Status' column.	• Status Changes
To Status	The status the account was changed to.	• Status Changes
Status Change Date	The date the account entered its current status.	• Debt Recovery / Received Payments

Status	The current status of the account and the length of time in that status.	• All Tabs excluding Status Changes tab
Has Active Services	Indicates if the account has active services.	• Status Changes • Debt Recovery/Received Payments • Credit Hold Eligible • Credit Hold Accounts
Last Payment	The date of the last payment made on the account.	• All tabs
AVG Days to Pay	Financial metric that measures the average number of days it takes for an account to pay its invoices.	• Credit Hold Eligible • Credit Hold Accounts • Internal Collection Accounts • External Collection Accounts
Past Due Days	The number of days an account has remained in a past due status. An account is considered "Past Due" if it has at least one overdue invoice.	• Credit Hold Eligible
Last Invoice Date	The date of the last invoice.	• Status Changes
Note	The note that was added when the account's status was changed.	• Status Changes
Collection Group / Agency	If a collection agency was assigned to the account, it will display here.	• Debt Recovery / Received Payments
Payments Since Status Change	The total amount of payments received and the number of payment transactions.	• Debt Recovery / Received Payments
Write Off Amount	If a write off amount was applied to the balance, it will display here.	• Debt Recovery / Received Payments
Current	The total deposit balance available.	All Tabs excluding Status Changes tab
Aging Buckets 1-30, 31-60, 61-90, 91-120, Over 120	AR aging buckets categorize an account's outstanding balances by time period.	All Tabs excluding Status Changes tab
Total	The total balance amount across all aging buckets less the current amount.	All tabs excluding Status Changes tab

Status Changes

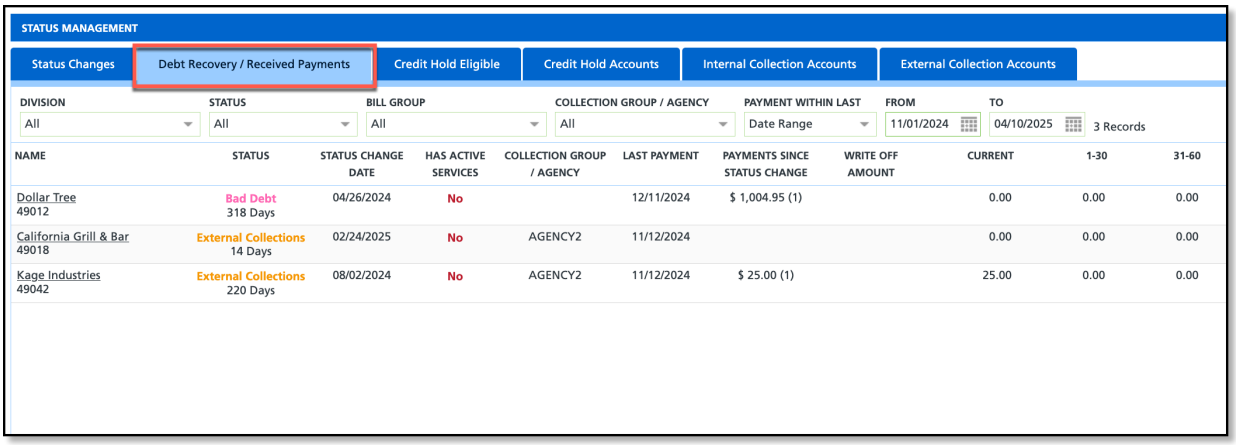
The *Status Changes* tab provides a detailed view of accounts that have undergone any status change. With available filtering options, you can track and review updates to account statuses, ensuring better oversight and

management.



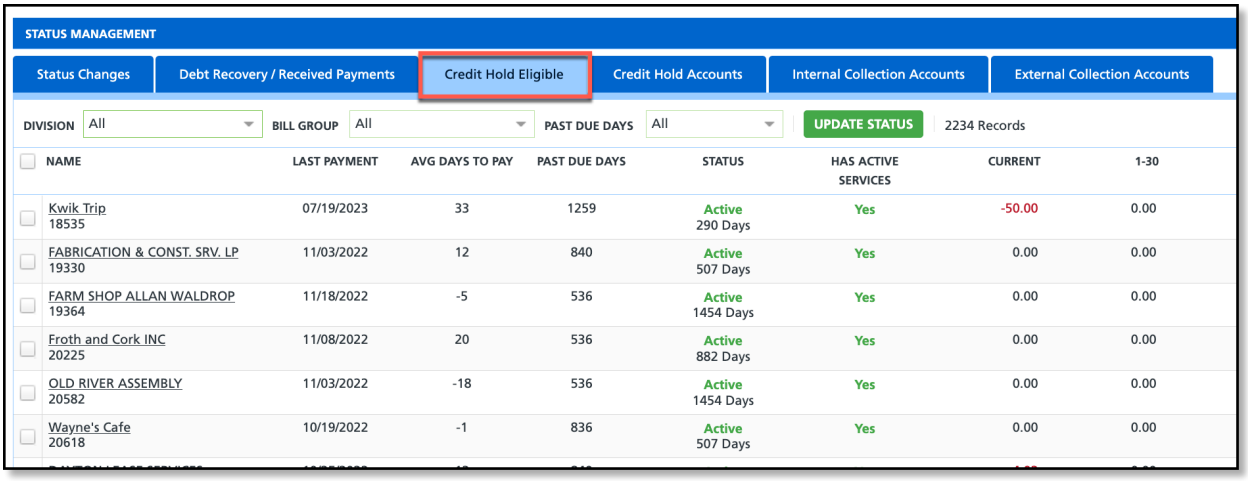
Debt Recovery / Received Payments

The *Debt Recovery / Received Payments* tab provides a centralized view of accounts in bad debt, credit hold, or collection status. This screen displays accounts with a past due balance, allowing for easy monitoring and management. Once a balance is paid or written off, the account will be removed from the list.



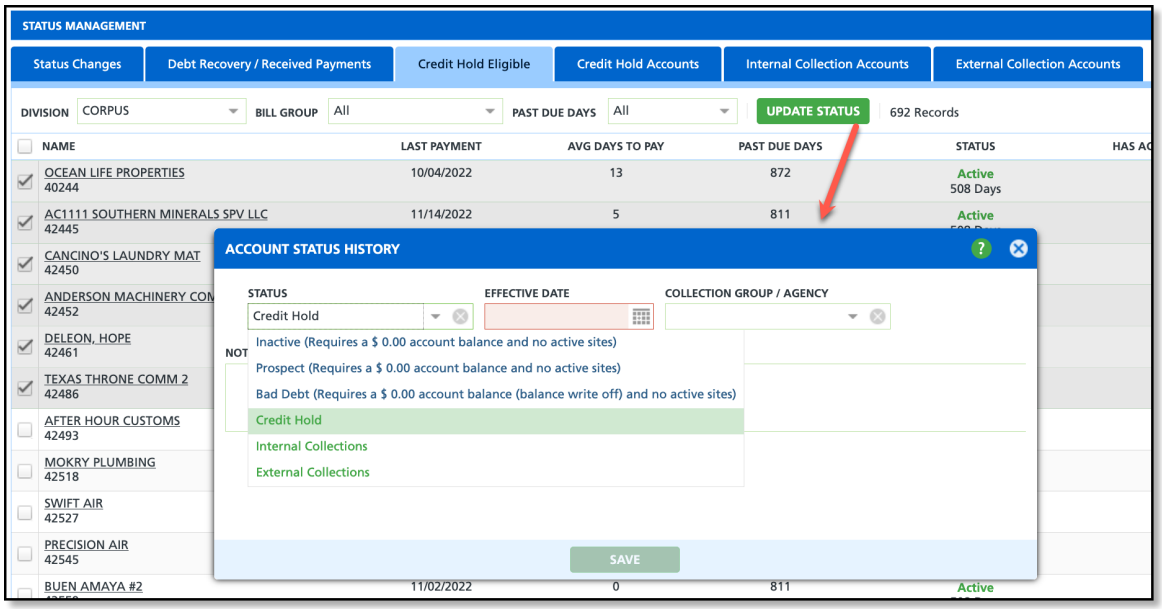
Credit Hold Eligible

The *Credit Hold Review* tab helps identify accounts that meet the criteria for a credit hold. Using the available filters, you can review accounts based on their past due status and other key factors. The **Past Due Days** column clearly shows how long each account has been overdue, allowing for quick assessment and action, including the ability to mass update selected account statuses.



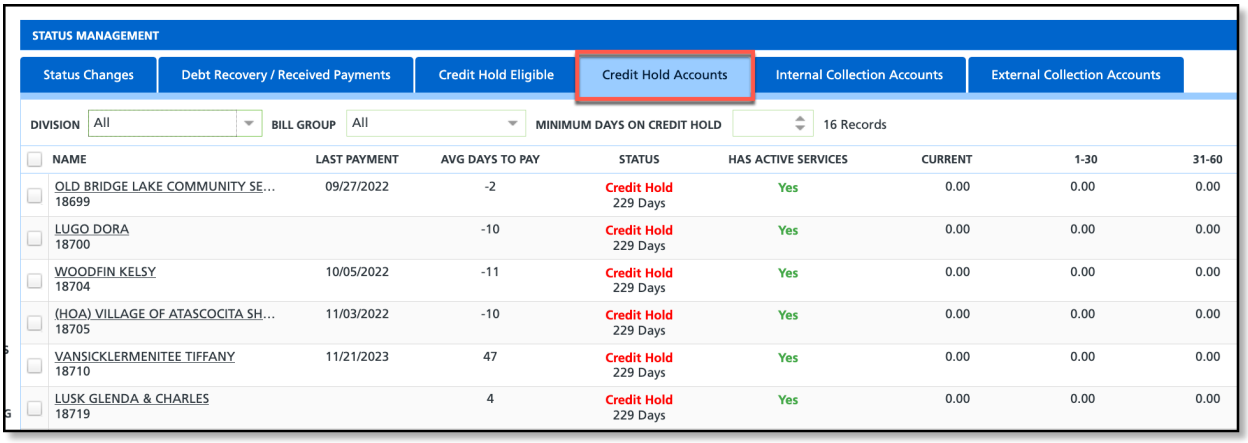
Update Status

The **Update Status** button offers a fast and efficient way to update account statuses from the Status Management screen. Simply select the accounts you want to update, click **Update Status**, and the **Account Status History** screen will open, allowing you to apply a new status.



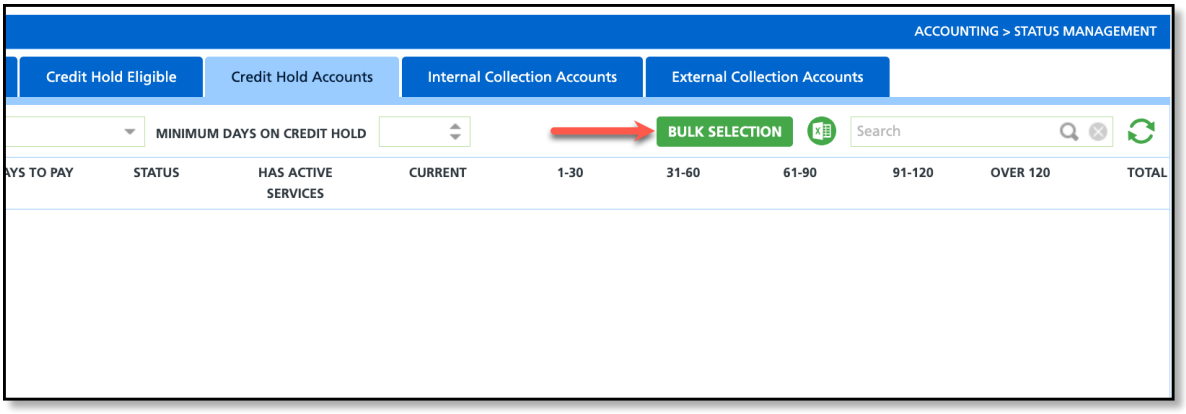
Credit Hold Accounts

The *Credit Hold Accounts* tab allows you to view all accounts that have a credit hold status, based on the selected filter criteria. This screen provides a focused overview of accounts currently on credit hold for efficient management and review.



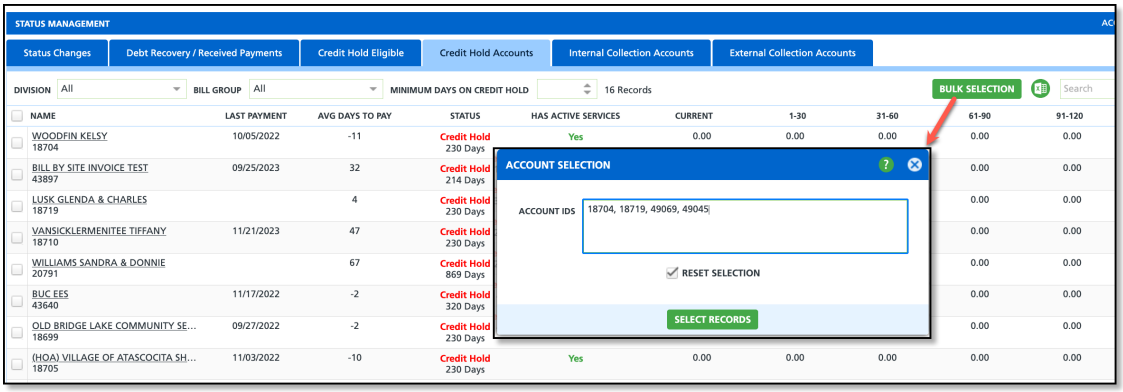
Bulk Selection

In scenarios where the screen returns a high amount of records, use the Bulk Selection button to mass select the accounts a status change applies by entering their account ID. Review the three sections below that outline the process.



Enter Account IDs

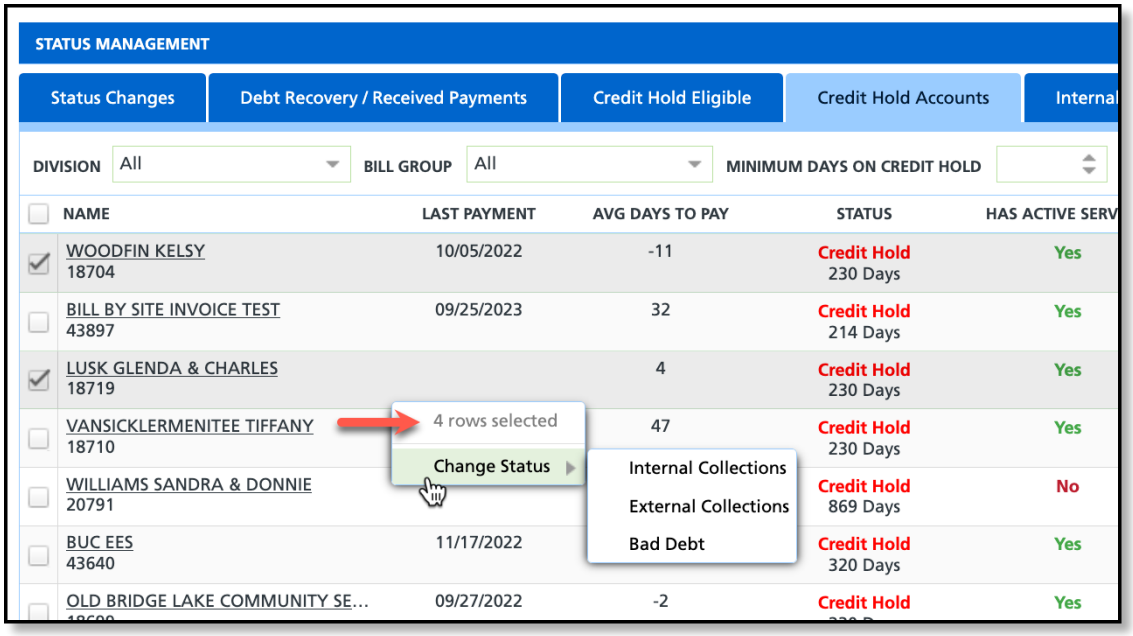
In the **Account Selection** window, enter each account number separated by a comma. Keep the **Reset Selection** box checked to ensure the system removes any previously selected accounts whose IDs were not entered in the text box.



Change Status

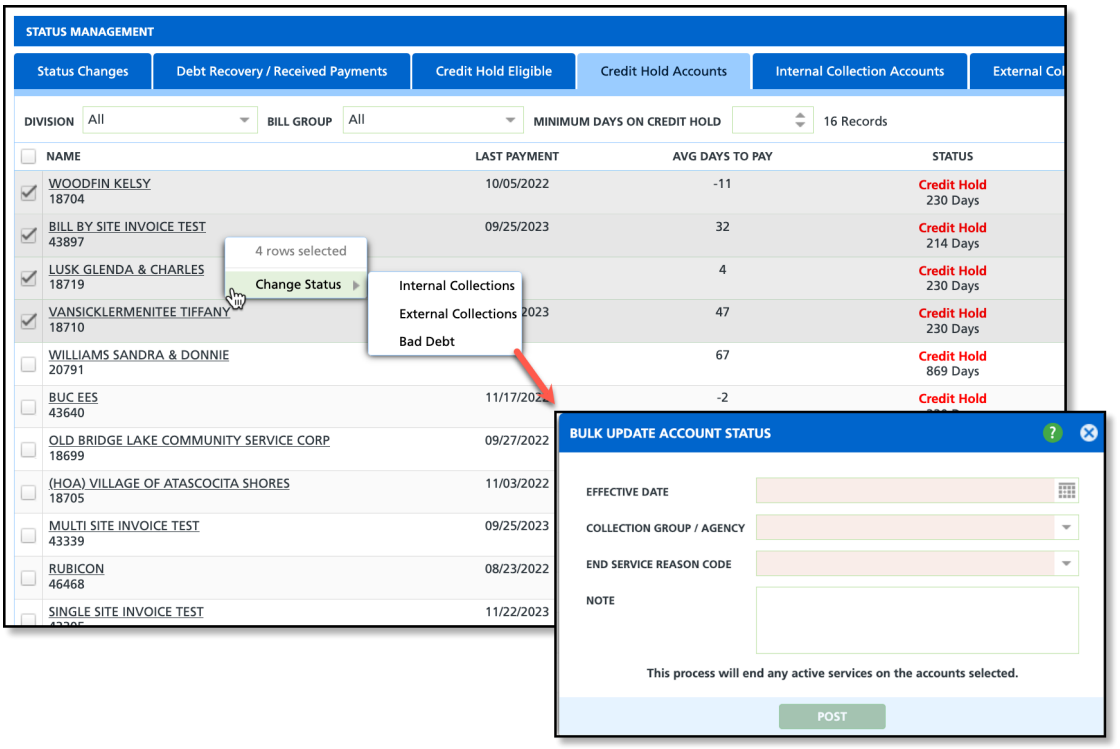
Once the account records are selected, right-click on any row of a selected account to open the **Change Status** popup. If you right-click on a row that is not selected, the system will clear all previous selections and select only that account. The popup will display the total number of selected records at

the top. From there, choose the appropriate status for the accounts.



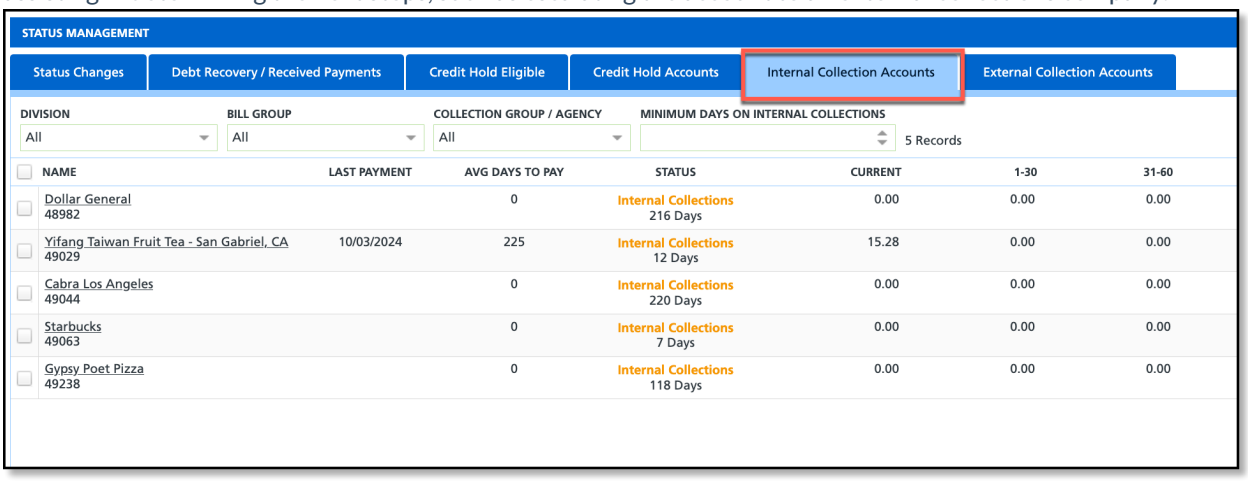
Bulk Update Account Status

After selecting a status, the **Bulk Update Account Status** popup editor will appear, displaying fields based on the chosen status. If an account has any remaining active services, they will be ended upon **Post.**



Internal Collection Accounts

The Internal Collection Accounts tab offers an overview of accounts with an internal collections status, along with the duration they have been in this status. This screen helps monitor and manage accounts in internal collections, assisting in determining the next steps, such as escalating the account to an external collections company.



External Collection Accounts

The External Collection Accounts tab provides an overview of accounts in external collections status, along with the number of days they have been in this status.

