

Beyond Green Solutions, LLC

Uniting Collections, Empathy, & Technology

Client Portal

Beyond Green Solutions (BGS) [Client Portal](#) allows businesses to view, modify, and upload account information 24/7. It is fully integrated with the system of records, with changes taking effect almost immediately for our team to react to.

Log In

Your log in will be provided by the BGS team. Please contact your representative for more information.

The Portal can be accessed from the [Beyond Green Solutions Homepage](#) or directly at <https://clients.beyondgreensolutions.com/Consumer>

[Client Login](#)

Consumer Search

The Consumer Search provides you with details on specific accounts/people, and claims. It's best utilized to get information on one person.

- Search using **Your Account Number, Consumer Name, Business Name, Identifier, Consumer Number, or Agency Account Number.**

The screenshot shows the Beyond Green Solutions Client Portal search interface. At the top, the logo and tagline are displayed. Below the logo, a welcome message reads: "Welcome to the Beyond Green Solutions Client Portal! Please contact us at (585) 450-2775 with any questions." The search area features a dropdown menu for "Name" with a search button. Below the search area, a table displays search results with columns for Reference Number, Name, Identifier SSN/EIN, Consumer Number, Account Number, City, State, Zip Code, Email Address, and View Accounts. The first row shows a reference number of 1, a name starting with "Jo", a city of Rochester, and a state of NY.

Reference Number	Name	Identifier SSN/EIN	Consumer Number	Account Number	City	State	Zip Code	Email Address	View Accounts
1	Jo				Rochester	NY	14615		



Quick Tip: Searching Tools

- Use the Wildcard feature to assist with searches. Enter a letter with an asterisk; ex. "b*" in last name to search for all consumers whose last name starts with a "b".



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- View account information, including demographics, paid balances, and outstanding balances

The screenshot displays the account information interface. On the left is a sidebar with options: Consumer Search, Edit Address, Add Phone Number, and Attach Document. Below these are fields for 'Unknown (585) - Valid' and 'Email Address'. The main area features a table with columns: Reference Number, Placement Date, Regarding, Paid Balance, Current Balance, and Status. A 'Show Closed Accounts' toggle is visible. A summary box at the top right indicates 'Schedule created on 04/22/2022' with 'Next Due Date 05/23/2022' and 'Next Due Amount \$50.00'.

Reference Number	Placement Date	Regarding	Paid Balance	Current Balance	Status
	10/25/2021	Patient name:	(\$)		Open
	10/25/2021	Patient name:	(\$)		Open
	10/25/2021	Patient name:	(\$)		Open
	10/25/2021	Patient name:	(\$)		Open

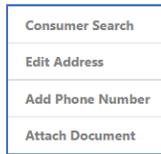
- Turn on the **Show Closed Accounts** button to see additional details.



- Add Transaction, Upload Account Document** to claim, and **View Account Details**



- Edit Address, Add Phone Number, Attach Document** to client/person



- Return to the Main Screen using the Beyond Green Solutions button



Quick Tip: Document Attachments

- Attach to Client/Person/Patient – Use **Attach Document** in left-side menu
- Attached to specific claim/encounter/occurrence – Use **Upload Account Document** on Consumer screen

New Business Upload

The **Documents Upload** section allows client to share any type of account file with the Beyond Green Solutions team and provide details on the files being uploaded (type of account, age of the account).



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Reporting

The Reporting tool provides you with details for your organization across many accounts, claims, and timeframes.

1. Select the report
2. Enter in **Parameter Values** if needed
3. Chose the file type
4. **Download Report**
5. A downloaded file will appear in your browser to open and save

Parameter	Value
Start Date	<input type="text"/>
End Date (Optional)	<input type="text"/>
Excel <input type="button" value="v"/>	<input type="button" value="Download Report"/>

Available reports

- **Address Update Report** details new addresses entered by the Beyond Green Solutions team.
- **Client Inventory Report** details active clients, by claim, at Beyond Green Solutions. Details include current balance, last letter sent, last contact date, and payment schedule information
- **Monthly Close Report** details clients, by claim, which have been closed by Beyond Green Solutions. Details include closed reason and closed date.
- **Placement Acknowledgement Report** details newly placed accounts, by claim, which Beyond Green Solutions has begun servicing. Details include the claim balance.

Client Resources

Learn more about how you can improve your past due communications and workflows through our **Blog** and **Community Events**.

Contact Us

Provides information at your fingertips for the Beyond Green Solutions team and allows you to send electronic messages.



Quick Tip: Document Attachments

- Use the Attach File feature in the Contact Us section to send files on multiple accounts

