CMvX: All the Claims Overview

- Vertican has built a new paradigm where each firm has a single interface to vExchange.
- CMvX was custom designed around Collection-Master.
- The goal is to include ALL of the fields for ALL of the claims.
- Other than setting up *VX:#### codes, there is no need to create or setup action codes.
  - The information is automatically uploaded to vExchange because it exists.
- One daily upload includes all of the claims for all of the DTPs.
- vExchange is expanding its list of DTPs.
  - The plan is to have all of the DTPs hosted by vExchange.

CMvX - Benefits

- Single Export
  - With a growing list of Custom DTPs the processing window was getting tight!
- Reduced human errors and setup requirements.
  - Only *vX: codes need be setup relevant CM information is uploaded.
- Required changes to Collection-Master are infrequent.
  - 99 percent of the time DTP changes do not require updating to a new release.
  - New *vX: codes and infinity fields address most of the requirements.
- Centralized DTP at vExchange means that every firm will comply.

CMvX – Matrix Setup

- [4-2-1-6-6-3] – Copy YGC "*CC:" Codes to CvCX "*vX:" Codes
  - As an existing YGC User, your YGC Matrix will be copied to CMvX.
  - You can run it more than once, new/missing codes will be added.
- [4-2-1-6-6-1] – CMvX Updates
  - Enhance CMvX matrix here.
  - Action Codes – Setup additional *vX: codes, 1 paperless entry may trigger 1 EDI code + 10 additional action codes for a total of 11 *vX: codes.
- [4-2-1-6-6-2] – CMvX Financial Matrix
  - Setup *vX: to map for financial codes.
  - Remember to map Subcodes

4

CMvX – Onboarding

- Onboarding is one of the most difficult tasks in deploying an EDI.
- CMvX & vExchange license fees are included with your CM subscription.
- Analytics Dashboard is included and will report on all your claims!
- The first time you export will take a very long time!
  - [4-2-1-V-3] – Report All Records
  - The system will automatically pick 1/1/1931 as the starting date.
  - You may run Open & Closed Claims Separately (A good idea).
  - The export will create a giant zip file with each record as a separate file.
  - The vExchange team will import the Giant file during off peak hours.
  - Onboard Now! Don't wait for your client.

CMvX – Onboarding

CMvX File Export

Processing All Eligible Claims

Processing Open		15192
File #		RSNS0783
Time Spent		00:06:39
Estimated Remaining		00:01:48

Enter Starting Date: 01/01/1940
Open[O]/Closed[C]/All[A]: A

○ Report Changed Records Only
◉ Report All Records

Drive	Full Path	Free Space (GB)
[TEMP]	F:\CLSINC\TEMP\6011	660
N:	N:\USERS\LUIS.GOMEZ	379
[WRKDRV]	F:\CLSINC\TEMP\VT-VDI-P0016_LUIS.GOMEZ	660

78%

It's all about the Changes

- Collection-Master updates "Changes" when a value is changed.
- Each field is mapped to a CMvX Record.
- Fields may be updated any way.
  - EDI
  - Merge Pop
  - User Interface
- If it's in Changes, then CMvX Will Report it!
  - There may be some fields that do not update Changes. If so, please report these fields to Client Success, it is our goal for every field to update changes.

It's all about the Changes

Dbt #	Rel	Type	Table	Field	CMvX #	Old Value	Changed To	Current Value	User	Time
1	0	MAIN	DEBTOR	STREET	211	12 Twelve St	55 N Main St	50 E GLENN AVE	JAC	01/28/2021-08:36:26
0	0		MASTER	D1_STREET		12 Twelve St	55 N Main St	50 E GLENN AVE	JAC	01/28/2021-08:38:32
0	0		MASTER	PER_DIEM_RATE		5.5554	5.5554	5.5562593	JAC	01/28/2021-08:38:32
1	0	MAIN	DEBTOR	RET_MAIL	211	N	Y	Y	JAC	01/28/2021-08:41:52
1	0	MAIN	DEBTOR	STREET	211	55 N Main St	50 E GLENN AVE	50 E GLENN AVE	JAC	01/28/2021-08:41:52
1	0	MAIN	DEBTOR	STREET2	211		CONE ST	CONE ST.	JAC	01/28/2021-08:41:52
1	0	MAIN	DEBTOR	CITY	211	Montville	Auburn	Auburn	JAC	01/28/2021-08:41:52
1	0	MAIN	DEBTOR	ST	211	NJ	AL	AL	JAC	01/28/2021-08:41:52
1	0	MAIN	DEBTOR	ZIP	211	07045	36830-0000	36830-0000	JAC	01/28/2021-08:41:52
0	0		MASTER	D1_STREET		55 N Main St	50 E GLENN AVE	50 E GLENN AVE	LIG	02/17/2021-12:36:57
0	0		MASTER	D1_CS		Montville NJ	Auburn AL	Auburn AL	LIG	02/17/2021-12:36:57
0	0		MASTER	D1_ZIP		07045	368300000	368300000	LIG	02/17/2021-12:36:57
0	0		MASTER	D1_RETURNED		N	Y	Y	LIG	02/17/2021-12:36:57
0	0		MASTER	PER_DIEM_RATE		5.5554	5.5554	5.5562593	LIG	02/17/2021-12:36:57
0	0		MASTER	PER_DIEM_RATE		5.5554	5.5554	5.5562593	LIG	02/17/2021-13:45:36
0	0		MASTER	STATUTE_DATE	204	03/15/2015	2021/08/10	2021/08/10	LIG	02/18/2021-14:57:38
0	0		MASTER	PER_DIEM_RATE		5.5554	5.5554206	5.5562593	LIG	02/18/2021-14:57:38
0	0		MASTER	INT_DATE		2018/11/09	2021/04/07	2021/04/07	RW	03/04/2021-20:11:59
0	0		MASTER	STORED_INT		2144.4	3243.96	3243.96	RW	03/04/2021-20:11:59
0	0		MASTER	PER_DIEM_AMT		1.2495039	1.2497779	1.0822421	RW	03/04/2021-20:11:59
0	0		MASTER	PER_DIEM_RATE		5.5554206	5.5566387	5.5562593	RW	03/04/2021-20:11:59
0	0		MASTER	I_3100_IR_J	241	10	11	10	RW	03/04/2021-20:11:59
0	0		MASTER	PER_DIEM_AMT		1.2497779	1.0822421	1.0822421	RW	03/04/2021-20:12:32
0	0		MASTER	PER_DIEM_RATE		5.5566387	5.5562593	5.5562593	RW	03/04/2021-20:12:32
0	0		MASTER	I_3100_IR_J	241	11	10	10	RW	03/04/2021-20:12:32
0	0		EXTRA	MISC_AMT1	231	222.22	900	900	RW	03/04/2021-20:13:38
1	0	MAIN	DEBTOR	STREET2	211	CONE ST	CONE ST.	CONE ST.	LIG	03/26/2021-12:30:53
1	4	2nd	INTERNAL	*NEWREC	244				HA	05/24/2021-17:30:26
1	5	Main	INTERNAL	*NEWREC	245				HA	05/24/2021-18:49:37
0	0		MASTER	BANK_NO		0	3	3	HA	05/24/2021-18:49:43
1	0	MAIN	DEBTOR	LANGUAGE		8224	99.00	99.00	LIG	06/11/2021-09:02:16

Other CMvX Records

While Changes determine most of the updates, there are other ways to send information to vExchange.

- Paperless Files Notes (with or without *vX: code matrix)
- Documents Merged
- Financial Transactions
- Finalized Costbill & Remittance Reports
- Tags
- Payment Arrangements

CMvX Matrix – *vX: Codes

CMvX Matrix for SAMPLE1 Re:ABC CORPORATION   Vs. ALLEN/JOHN Ö $7,109.43/ $10,469.19

Sort: [Status ▼]   Filter: [(All) ▼]

Status	Date	Age	*vX Code:	Code	Description	Comment	Received	Disbursed	Balance
ack	04/30/19	7365	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	05/06/19	7371	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	05/06/19	7371	*vX:I104	*DBT001	Debtor:1 Fields Modified				$8,209.44
ack	05/07/19	7372	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	05/07/19	7372	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	05/07/19	7372	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	05/08/19	7373	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	08/22/19	7479	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	12/12/19	7591	*vX:L501	*Extra	Extra:1 Fields Added				$8,209.44
ack	12/13/19	7592	*vX:L501	*Extra	Extra:1 Fields Modified				$8,209.44
ack	01/13/20	7623	*vX:A100	*PROP001	Property:1 Fields Modified				$8,209.44
ack	04/06/20	7707	*vX:A090	90.00091	Interest Time Stamp - (00091)	COCO_EDI			$8,209.44
ack	01/14/21	7990	*vX:B001	*VX:B001	Cease & Desist				$8,209.44
ack	01/28/21	8004	*vX:I104	*DBT001	Debtor:1 Fields Added				$8,209.44
ack	02/17/21	8024	*vX:A107	*D1_CSZ	Montville NJ 07045				$8,209.44
ack	02/17/21	8024	*vX:S122	*D1_M/R	N				$8,209.44
ack	03/04/21	8039	*vX:A090	90.003	Interest Base or Perdiem Changed (003)				$8,209.44
ack	03/04/21	8039	*vX:A090	90.003	Interest Base or Perdiem Changed (003)				$8,209.44
ack	03/04/21	8039	*vX:L501	*Extra	Extra:1 Fields Modified				$8,209.44
ack	01/16/21	7992	*vX:I104	*DBT001	Debtor:1 Fields Modified				$8,209.44
ack	03/26/21	8061	*vX:I104	*DBT001	Debtor:1 Fields Modified				$8,209.44
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent	.00		$970.00	$8,209.44
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent	.00			$8,209.44
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent	.00			$8,209.44
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent		$.01		$8,209.43
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent		$100.00		$8,109.43
ack	04/07/21	8073	*vX:A020	20.0001	Collection (1) Cash or Cash Equivalent		$1,000.00		$7,109.43
ack	06/11/21	8138	*vX:I104	*DBT001	Debtor:1 Fields Modified				$7,109.43
===	07/23/21	8180	TODAY	========	============================	==============			

Related Party Changes [1-2-2-#]

- Employers, Banks, Adversary Attorney, and DSC
  - Update data in 1-2-2-#
  - Included in IChanges
- CMvX Update will scan any claims assigned to the related party.
- Updated CMvX records will be automatically created for any claim that was assigned to that related party.

Pre-Closed Claims

- Custom\PreClosedQueue.ini
  - [Pre-Closed]
    - Pre-Closed Queues=
    - [Tab] or [Comma] delimited list
- Matching Diary Queues are considered "Pre-Closed"
- Diary Date is the "Pre-Closed Date"
- A Pre-Closed Claim is "Open" and included with Open Claims.
- R271 will use the "Pre-Closed Date"

CMvX – Client Updates – [4-2-1-V-3]

- Daily Export
- Automatically picks the appropriate starting date
- (O)pen (C)losed (A)ll.
  - You can run Open & Closed in separate sessions concurrently.
- Report Changed Records Only
- Index (Automatic)
  - The first step will create fresh indexes to quickly extract the data.
  - This process improves performance and ensures that all the data is included.

N:CMvX.log

- Created every time you run an export
  - If Open or Closed runs, see CMvX_O.log or CMvX_C.log
- Keep a copy for "Baseline performance results"
- Provides details about the export
  - Record Count & Time Spent for each record
  - Total Elapsed Time & Claims Processed
  - Breakdown for various components of conversion
- Identify
  - Performance problems by comparing logs over times
  - Specific components / records that are taking a long time.

Generate Automation INI Settings

AUTOMATION SETTINGS - CMVX File Export

Based on the inputs provided by you on the screen, we have generated the INI settings.
Copy and paste the text in the shaded box into your .ini file.

```
||MENUPATH:4-2-1-V-3
DATE START=[AUTO]
CHANGED ONLY=Y
OPEN/CLOSED=A
```

*Note: Removing a parameter and the value will pull the default value for that parameter.
Leaving the parameter, but removing the value will pull a blank value for that parameter.*

15

CMvX – Clear Cache [4-2-1-V-9-1]

- **Rarely required!**
- Resends ALL of the Claim information.
- Resetting Cache on many claims will delay vExchange processing.
- vExchange will automatically trigger CM "Clear Cache" as required.
  - Trigger CM / vExchange Record (R196)
  - Change Key in CM (R197)
  - Reset the cache on an individual claim if it's missing (R198).

CMvX Re-Export [4-2-1-V-9-#]

- Re-Export CMvX Financial Information [4-2-1-V-9-2]
- Re-Export CMvX Remittance Information [4-2-1-V-9-3]
- Coming Soon
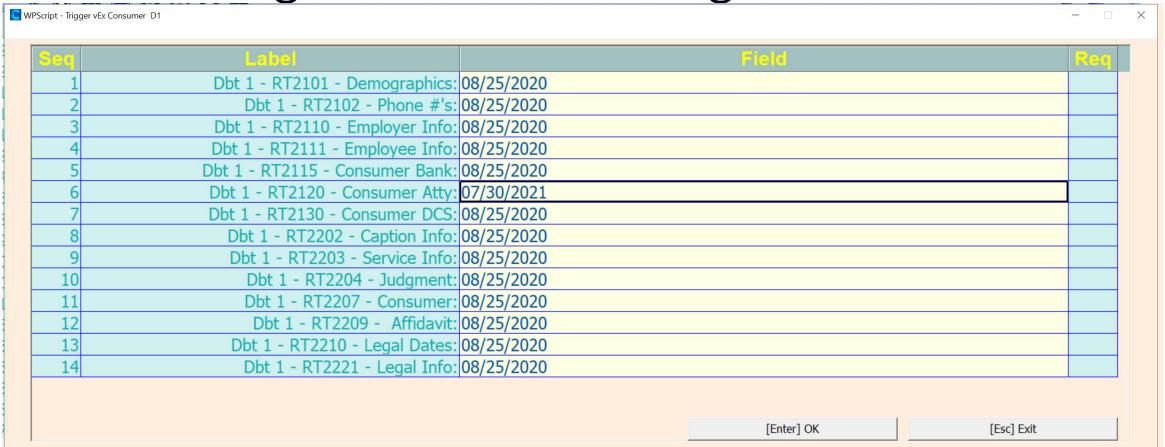 - Re-Export CMvX Claim Information [4-2-1-V-9-4]

Resending CMvX & vExchange Records.

- CMvX_R2##_DATE – Fields in Master, Debtor, & Property
  - Update the field with a "New Date" to trigger CMvX records.
  - Use "0" to specify today, that will always trigger a new CMvX record.
- VEX_R2### - Fields in Master, Debtor, & Property
  - Update the field with a "New Date" to trigger vExchange records.
  - Use "0" to specify today, that will always trigger a new CMvX record.
  - vExchange Records will trigger all the related CMvX Records including Infinity fields.
- Request new Records
  - WP Scripts
  - Merge Pop
  - CM EDI
  - CMvX

18

Resending CMvX & vExchange Records.

WPScript - Trigger vEx Consumer D1

Seq	Label	Field	Req
1	Dbt 1 - RT2101 - Demographics:	08/25/2020	
2	Dbt 1 - RT2102 - Phone #'s:	08/25/2020	
3	Dbt 1 - RT2110 - Employer Info:	08/25/2020	
4	Dbt 1 - RT2111 - Employee Info:	08/25/2020	
5	Dbt 1 - RT2115 - Consumer Bank:	08/25/2020	
6	Dbt 1 - RT2120 - Consumer Atty:	07/30/2021	
7	Dbt 1 - RT2130 - Consumer DCS:	08/25/2020	
8	Dbt 1 - RT2202 - Caption Info:	08/25/2020	
9	Dbt 1 - RT2203 - Service Info:	08/25/2020	
10	Dbt 1 - RT2204 - Judgment:	08/25/2020	
11	Dbt 1 - RT2207 - Consumer:	08/25/2020	
12	Dbt 1 - RT2209 - Affidavit:	08/25/2020	
13	Dbt 1 - RT2210 - Legal Dates:	08/25/2020	
14	Dbt 1 - RT2221 - Legal Info:	08/25/2020	

[Enter] OK   [Esc] Exit

19

Resending CMvX Records

- Master Fields
    - CMVX_R201_DATE |Trigger RT201 - Placement
    - CMVX_R202_DATE |Trigger RT202 - Placement (2)
    - CMVX_R203_DATE |Trigger RT203 - Creditor/Plaintiff
    - CMVX_R204_DATE |Trigger RT204 - Claim Dates
    - CMVX_R205_DATE |Trigger RT205 – Court/Legal
    - CMVX_R231_DATE |Trigger RT231 - Miscellaneous Fields
    - CMVX_R241_DATE |Trigger RT241 - Legal

Resending CMvX Records

- Debtor Fields
  - CMVX_R211_DATE |Trigger RT211- Consumer Demographics
  - CMVX_R212_DATE |Trigger RT212- Consumer Bankruptcy
  - CMVX_R213_DATE |Trigger RT213- Consumer Legal
  - CMVX_R214_DATE |Trigger RT214- Consumer Defendant
  - CMVX_R215_DATE |Trigger RT215- Consumer Phones
  - CMVX_R244_DATE |Trigger RT244- Consumer Employer
  - CMVX_R245_DATE |Trigger RT245- Consumer Bank
  - CMVX_R246_DATE |Trigger RT246- Consumer Adversary Atty
  - CMVX_R247_DATE |Trigger RT247- Consumer CCCS Record

Resending CMvX Records

- Property Fields
  - CMVX_R221_DATE |Trigger RT221 - Property

Resending vExchange Records

- Master Fields
  - VEX_R2001_DATE |Trigger RT2001- Account Placement
  - VEX_R2002_DATE |Trigger RT2002- Creditor Information
  - VEX_R2003_DATE |Trigger RT2003- Primary Balance
  - VEX_R2190_DATE |Trigger RT2190- Misc Information
  - VEX_R2205_DATE |Trigger RT2205- Probate Information

Resending vExchange Records

- Debtor Fields
  - VEX_R2101_DATE |Trigger RT2101 - Consumer Demographics
  - VEX_R2102_DATE |Trigger RT2102 - Consumer Phone #'s
  - VEX_R2110_DATE |Trigger RT2110 - Consumer Employer
  - VEX_R2111_DATE |Trigger RT2111 - Consumer Employers
  - VEX_R2115_DATE |Trigger RT2115 - Consumer Employee
  - VEX_R2120_DATE |Trigger RT2120 - Consumer Bank
  - VEX_R2130_DATE |Trigger RT2130 - Consumer Debt Settlement
  - VEX_R2202_DATE |Trigger RT2202 - Caption Information
  - VEX_R2203_DATE |Trigger RT2203 - Service Information
  - VEX_R2204_DATE |Trigger RT2204 - Judgment Info
  - VEX_R2207_DATE |Trigger RT2207 - Consumer Bankruptcy
  - VEX_R2209_DATE |Trigger RT2209 - Affidavit Info
  - VEX_R2210_DATE |Trigger RT2210 - Service Information
  - VEX_R2221_DATE |Trigger RT2221 - Consumer Legal Info (Court Dates)

Resending vExchange Records

- Property Fields
  - VEX_R2125_DATE |Trigger RT2125 - Property

Resending *vX Codes

- Setup Document in 1-7
  - Add PS Comments:
    - PCODE - *vX:#### Required
    - PDATE – Optional
    - Add the new fields at the End, leaving room for other PS Comments.
- Request Document (Paperless or X-Letter Merge)
  - Enter the desired *vX:#### code.
  - Optionally, include a Date.
- Optionally, leave the document description blank.

Costbills & Remittances

- CMvX Record 253 – Live Remittance
- Created Automatically
  - F:\CLSINC\EDI_FILES\CMVX[Forw #]_[Date/Time].CST
  - F:\CLSINC\EDI_FILES\CMVX[Forw #]_[Date/Time].RMT
- In addition to the daily "UPD" file, you should also upload the "CST & RMT" files.
- The ".CS_ & .RM_" files are costbills and remittance reports that were not made permanent (Don't upload these).

Costbills & Remittances

- CMvX Records
  - 210
    - Pulls from "FINAN" and includes any transaction that is posted in CM.
    - Is reported the "Next Day" after posting.
  - 250
    - Pulls from "COLBILLS" and includes any Remittance that is finalized in CM.
    - Is Reported the "Next Day" after remitting.
    - If you reverse a remittance, a (-) R250 will be created, so a single transaction could have multiple R250
  - 253
    - Is created by the process of finalizing the Costbill or Remittance.
    - Is created Immediately and available to be uploaded
    - Similar to R30 on YGC

Gates & Remediation

- Don't Shoot the Messenger!
  - Gates are defined by your Client.
  - Sometimes Gate Rules need to be Refined.
  - Reach out to your client Account Manager and share why you think the rule should be changed.
- Data With Integrity
  - With YGC, you got Garbage In, Garbage Out.
  - vExchange is intended to ensure that that data is correct and complete.
  - Remediation should be performed at the System of Record.
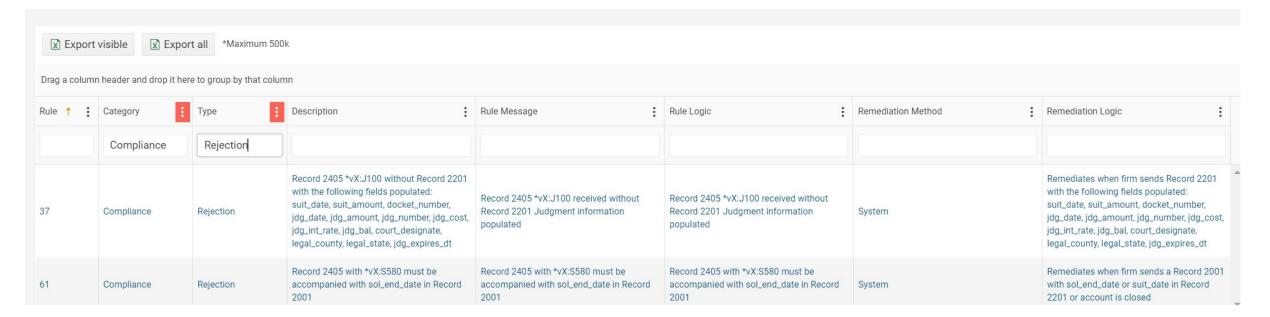
Gates & Remediation

- Remediation Methods
  - Missing Fields:
    - Update or add the fields in CM.
  - CM Data exists, but is missing on vExchange:
    - Use Re-Send or Trigger records to send to vExchange again.
  - Bad Financial Transactions:
    - Reverse & Re-Post the financial transaction.
  - Manual Remediation:
    - Some things may only be remediated manually.

Gates & Remediation

- Online Remediation Instructions
  - The Gate Rules, Descriptions, and remediation instructions are now being maintained in a database with an interface on the analytics web site.
  - Over time, this feature will be enhanced to include specific notes for your CMvX or QvX interfaces.
  - https://vexchange-development.azurewebsites.net/home/dashboard
    - Note: This is testing only ← Replace with Live Site
  - Gate Reports – Tools Gate Logic Report

Gates & Remediation

≡ Gate Logic Report

[x] Export visible   [x] Export all   *Maximum 500k

Drag a column header and drop it here to group by that column

Rule ↑	Category	Type	Description	Rule Message	Rule Logic	Remediation Method	Remediation Logic
	Compliance	Rejection					
37	Compliance	Rejection	Record 2405 *vX:J100 without Record 2201 with the following fields populated: suit_date, suit_amount, docket_number, jdg_date, jdg_amount, jdg_number, jdg_cost, jdg_int_rate, jdg_bal, court_designate, legal_county, legal_state, jdg_expires_dt	Record 2405 *vX:J100 received without Record 2201 Judgment information populated	Record 2405 *vX:J100 received without Record 2201 Judgment information populated	System	Remediates when firm sends Record 2201 with the following fields populated: suit_date, suit_amount, docket_number, jdg_date, jdg_amount, jdg_number, jdg_cost, jdg_int_rate, jdg_bal, court_designate, legal_county, legal_state, jdg_expires_dt
61	Compliance	Rejection	Record 2405 with *vX:S580 must be accompanied with sol_end_date in Record 2001	Record 2405 with *vX:S580 must be accompanied with sol_end_date in Record 2001	Record 2405 with *vX:S580 must be accompanied with sol_end_date in Record 2001	System	Remediates when firm sends a Record 2001 with sol_end_date or suit_date in Record 2201 or account is closed

Gates & Remediation

How to Troubleshoot CMvX

- How to Troubleshot vExchange / CMvX
  - https://vertican.tech/cm/pdr/how-to-troubleshoot-vexchange-cmvx/
  - https://vertican.tech/wp-content/uploads/2021/05/TroubleshootMCMvExchange.pdf
    - Note: Password Required and available to MCM firms.
- Gate Rules:
  - https://analytics.vertican.com/home/gatelogic
  - Coming Soon: CMvX / Collection-Master Specific translations of logic.
- vExchange Record Layouts
  - https://vportal.vertican.com/Help/vExchangeRecords.aspx?r=2405

The Mastermind Series

To learn about upcoming trainings:
https://vertican.tech/mastermind/

To view past trainings:
https://vimeo.com/vertican/