

6

**STEPS**

**TOWARD**

**SOLID**

**COLLECTIONS**

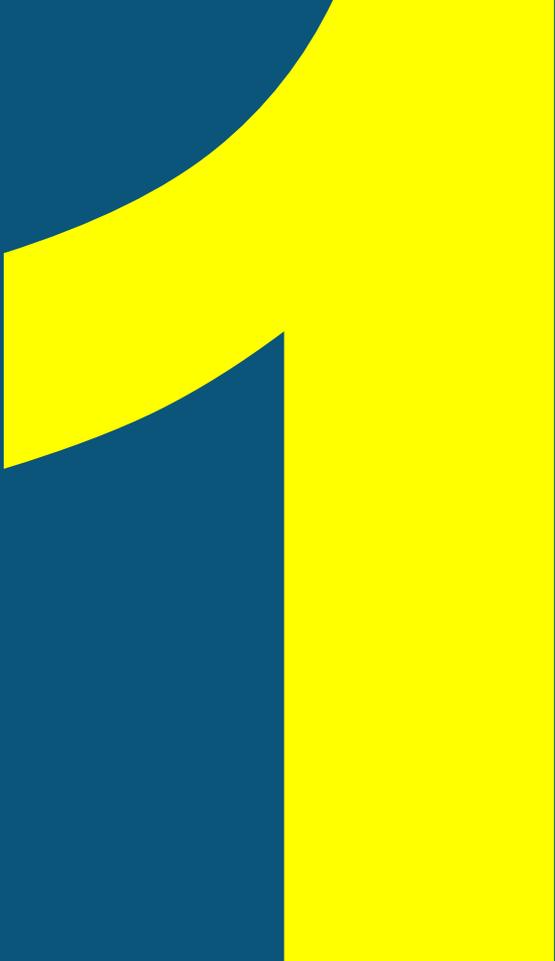
*when considering financial arrangements for dental patients*



**Details, Details,  
Details**



# DETAILS, DETAILS, DETAILS



Verify patient has dental insurance and the specifics of the plan.

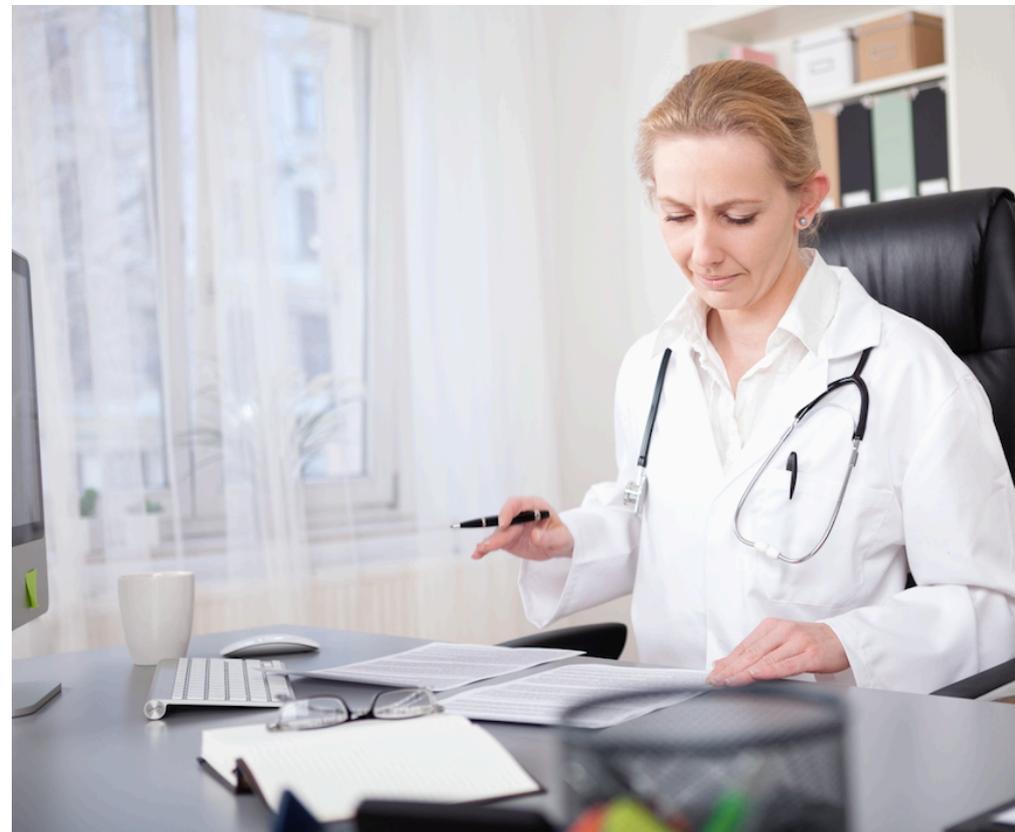
Verify that your patient information is entered accurately.

Verify the details of any secondary insurance.

Ensure that the treatment plan does not violate a condition of the plan.



# Solid Documentation



# Solid Documentation



Do we have a PAX and a BWX, does the PA show the apex of the root.

Do we have probe depths?

Has the dentist explained why the procedure is necessary in the notes?

# Did Insurance Get Everything They Want?



# Did Insurance Get Everything They Want?

# 3

One week after the procedure is complete it would be great to know that the insurance company has every thing that they need.

**Make the Call.**

**B.O.L.O Be On the Look Out**



# **B.O.L.O.**

Be On the Look Out.

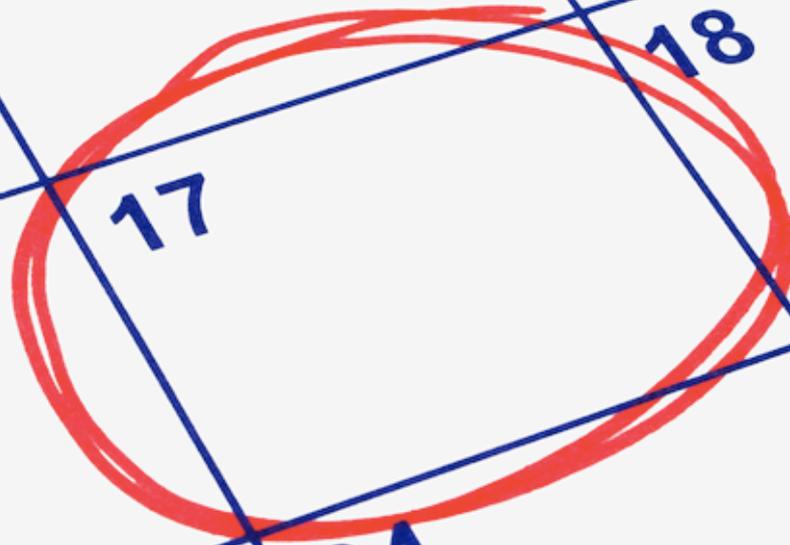
Learn the pattern of insurance companies.

Look for payments and missing payments.

Have a system to track and evaluate your progress

4

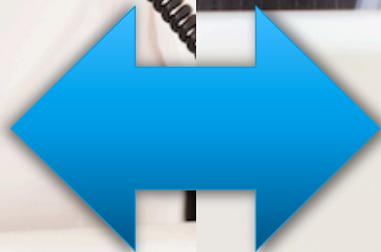
# Have a Drop Dead Date





# Have a Drop Dead Date

Decide in advance when too long is too long. If you haven't been paid by insurance by the drop-dead date, pick-up the phone and call to find out what the heck happened. It is important to keep detailed notes of people with whom you have had conversations.



**Involve the Patient**

# Involve the Patient



You do not have to let the patient know every time you do something with an account, but it is good to send them an email when something weird happens—like the insurance company telling you they lost the claim, etc.

# 6 STEPS TO COLLECT

1. MAKE SURE THE DETAILS ARE CORRECT BEFORE YOU BEGIN.

2. MAKE SURE THE INFORMATION THE INSURANCE COMPANY WILL WANT IS SOLID.

3. MAKE SURE THE INSURANCE COMPANY RECEIVED CLAIM AND SUPPORTING DOCUMENTS THEY WILL NEED.

4. BE ON THE LOOKOUT. ONCE YOU KNOW THE RHYTHM OF THE INSURANCE COMPANIES IT IS EASY TO CHECK AND SEE IF CLAIMS HAVE BEEN PAID.

5. HAVE A DROP DEAD DATE.

6. INVOLVE THE PATIENT.

# COLLECTION PRINCIPLES

1. WE BELIEVE IN FINANCIALLY ARRANGED DENTISTRY.

2. WE COLLECT THE PATIENT PORTION AT THE BEGINNING OF THE CARE.

3. WE ARE PROACTIVE ABOUT INSURANCE.

4. WE DO NOT INFLUENCE FINANCING DECISIONS.

5. THE FINANCIAL COORDINATOR OWNS THE ARRANGEMENT FROM START OF TREATMENT TO PAID IN FULL.