



# Communicate Financially with Your Patients

Educating Patients on Their Financial Responsibilities

**Jennifer de St. Georges, FPSA**

*“The lecturer drawing the largest crowd was, as expect, JdSG on Communication Financially and Accounts Receivable Management”*

*– Connecticut State Annual Meeting*

## Program Overview

The confidence, manner and specificity with which you communicate your financial policies and payment options to your patients dictates how they respect your fees and pay their bill. It is harder to collect money from patients with dental insurance than patients without coverage! Jenny covers philosophies, tools, and techniques to start off on the right foot—and enjoy faster cash flow.

## Promised Outcomes

Attendees elevate their practice/patient financial communication and increase cash flow. Educate 3rd party covered patients re their financial responsibilities and how written Financial Agreements eliminate surprises. Maximize opportunities Telephone Shoppers and 2nd opinion callers offer a practice. Enjoy lower Accounts Receivables.

## Program Areas

### A. Websites, Telephones

### B. Financial Discussion: Everything Happens Before Treatment is Scheduled

1. Financial Reception signs can support or sabotage your financial communications-get it right!
2. Your Financial Agreement: 10 essential financial/management points must include to prevent surprises
3. Financial Options: the 3 best Payment options for your practice/patients
4. ‘Outside patient financing’ programs. Look at them as an option which is free to you!
5. Cons of ‘Pay as you go’ usually outweighs the Pros’
6. Dos and don’ts of charging for Missed appointments.
7. Front desk collections should be fun! Do it well and enjoy a 105% collection ratio.

Patients to Their Total Financial Responsibility

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**Error! Reference source not found.:** The Devil is in the Details in Handling

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## A. Websites, Telephones Etiquette and Financial Communication

1. Website: Professionally state your financial philosophies and policies and remain welcoming!
2. Telephones and the New Patient: how to discuss, fees, charges, third party and deliver great customer service

3. Telephone Shoppers: 7 rules to make this your favorite phone call! Convert the doubter to a fan
4. Second Opinion patients: usually are not driven by money! Tap into this neglected patient

## B. The Financial Discussion: Everything Happens Before Treatment is Scheduled

8. Financial Reception signs can support or sabotage your financial communications-get it right!
9. Your Financial Agreement: 10 essential financial/management points must include to prevent surprises
10. Financial Options: the 3 best Payment options for your practice/patients
11. 'Outside patient financing' programs. Look at them as an option which is free to you!
12. Cons of 'Pay as you go' usually outweighs the Pros'
13. Dos and don'ts of charging for Missed appointments.
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20. Dos and don'ts of charging for Missed appointments.
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## Patients to Their Total Financial Responsibility

1. Assignment of Benefits-Accept Yes/No? Either way guidelines you must follow for legal and PR reasons
2. How to educate patients as to why their coverage is less than anticipated.
3. Patients who base treatment acceptance on 'what insurance will pay' need special handling
4. Essential patients whose insurance company said 'Doctor is overcharging for the area' learn the truth
5. Legally handle patients who ask you to 'Take their insurance coverage as their payment in full'
6. Claims not paid promptly? A fail-safe method that usually delivers money in a timely fashion!
7. Phase treatment maximizes patient benefits and offers great customer service. A big practice builder.

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1. Your Billing system: decrease those monthly statement telephone calls-easy to solve
2. Collection Calls: implement 11-Step Action Plan to make collection calls productive and stress-free.

## Error! Reference source not found.: The Devil is in the Details in Handling

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| 1. Business Coding      | 5. Cash Payments                         |
| 2. Deposits/Trans       | 6. Checks – Postdated/Bounced            |
| 3. Charges – Over/Under | 7. Courtesies – Professional and Patient |

## Testimonials

*“Jennifer deserves high praise. The course was concise, direct, relevant and humorous.”*

– Dr. T Landis, Grand View, WA

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– Connecticut State Annual Meeting

This is a Full Day Program

Programs 1 to 4 are adjustable to a half day format to provide a wider range of subjects