

Get access to the latest requirements in storing and billing patient financial account information; while ensuring your staff is properly trained to collect copays and fees at the time of treatment.

Collecting Payment and Eliminating Past Due Accounts

An Introduction to Paperless
Payments at Your Healthcare
Facility

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TO GET THE MAXIMUM VALUE
FROM THIS WORKSHOP, PLEASE
PRINT THIS ACTION GUIDE NOW.

3 TIPS TO GET THE MOST OUT OF THIS TRAINING

1. Print this handout so you can take notes during this webinar training.
2. Think of how the advanced techniques revealed from this training would benefit your office AND your patients.
3. Make a deadline to implement this free software at your office; utilizing at least 3 tips revealed during the training.

Paperless Payments

presented by



Collecting Payment and Eliminating Past Due Accounts

webinar workbook

5 Dangerous Oversights Nearly All Practices Make

TRAINING WORKBOOK

Decline in patient payments at the time of treatment and ineffective post-visit collections can be attributed to:

- Not having a sound financial policy or having patients completely fill in information forms.
 - Not accurately asking for payment at the time of treatment.
 - Not sending effective statements via regular mail and email.
 - Not utilizing modern techniques and technology and.
 - Not making distinctive collection calls.
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3-PART FORMULA TO INCREASE PROCESSING REVENUE

STEP 1. Eliminate [paper storage hassles](#).

STEP 2. Get [the most modern processing tech](#).

STEP 3. Create [new income streams 24/7](#).

COURSE OUTLINE

- I. Helpful Hints
- II. Financial Policy and Patient Information Form
- III. The Most Effective Ways and Times to Ask for Payment
- IV. Billing Statements and When to Send Them
- V. Modern Techniques and Technology to Increase Payment
- VI. Collection Calls and Overcoming Objections
- VII. Closing

I. Helpful Hints

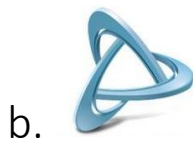
1. Take Notes



2. Symbols to Watch for



Both of these will let you know a FREE download is available. **HINT: You may click these buttons in the workbook.**



QuickTips on modern techniques and technology

3. Keep It Simple



II. Financial Policy and Patient Information Form



1. Proper Financial Policy



a. Make sure yours is _____

b. Two Places it should be posted:

1. _____

2. _____

c. It is REQUIRED to have a section on



2. Proper Check In Sheet



a. Make sure yours includes how the patient will be paying _____.

b. This must be _____.

c. Who does this make collecting money at the time of treatment easier for?





3. Proper Patient Information Form



a. Make sure yours has at least _____ ways to contact / track the patient.

b. This must be _____.

Why? _____

c. What if they refuse?



4. Rebuttals

a. Make it ALL about _____.

b. Do NOT get _____.

c. If they do not fill out your forms, when should you collect payment? _____

Notes

III. The Most Effective Ways and Times to Ask for Payment



1. How to Ask for Payment



a. Over the Phone

i. What is the Magic “Word”?

ii. What type of calls does it work with?

1. _____

2. _____

b. At the Time of Treatment

i. Use the Power of _____

ii. How many times should you use the word “today”?

iii. What are the three options of collecting payment?

1. _____

2. _____

3. _____

2. When to Ask for Payment

1. _____
2. _____
3. _____
4. _____
5. _____



3. Before the Appointment



Financial Policy from Episode 1

- a. Explain your _____.
- b. Name two ways you can accept payment:
 - i. _____
 - ii. _____

4. Immediately Following the Appointment

- a. Use the _____
- b. Who does this make things easier for?



5. Diverting a Personal Attack

a. If necessary, refer to the _____.

Why? _____

b. What is your “last ditch effort”?



6. How to Set Up a Proper Payment Plan



[Download Now](#)

a. Talk in terms of _____ NOT _____.

Why? _____

b. Be _____ and _____.

c. When should you collect the first installment?



7. Inbound Phone Calls

a. Do NOT miss an _____.

b. What is the Magic “Word”?



8. Outbound Phone Calls

a. Keep your calls _____.

b. Put their mind to work with the Power of
_____.

Notes

IV. Billing Statements and When to Send Them



1. Proper Statements

- a. What is the proper size? _____
- b. Must be _____ and _____
 - i. What two things should be used?
 - 1. _____
 - 2. _____
 - ii. Where should these be located?
 - 1. _____
 - 2. _____
- c. Make sure to include a _____
- d. What alternative to sending you a check should your office offer? _____

2. When to Send Statements

- a. How many days should pass before sending?

- b. Stick to your _____

V. Modern Techniques and Technology to Increase Payments

1. Internet Has Changed Everything

a. Our Communication with...

i. _____

ii. _____

iii. _____

b. Image

i. How _____ find out about your practice.

ii. How we are _____.

c. Banking

d. Vendors

e. PMS and EMR in “the cloud”

2. Practice Image

a. Marketing

b. Open Your Accounts _____

3. Thermal Paper Receipts are Harmful

- a. For you, your staff, and your patients?
 - i. What is BPA? A known _____!
 - ii. Studies reveal BPA causes damage to
 - 1. _____
 - 2. _____
- b. Bad for the Environment
 - i. Thermal paper is non - _____
 - ii. _____ are annihilated every year!

4. Properly Use Modern Technology

- a. Financial Management Software
- b. Securely stores all account information
- c. Processes _____ and _____
- d. Setup & Manage _____ and _____
billing
- e. Process Payments 24/7
 - i. At the _____
 - ii. Over the _____ and _____
 - iii. Via your _____



5. Testimonials

- a. www.paperlesspayments.net
- b. The #1 complaint we receive is...

- c. Bad for the Environment

6. Paperless Payments

- a. Saves _____
- b. Convenient for _____
- c. It's _____
- d. Completely _____ for you and your office.
- e. It's _____ to sign up!



Click the button for access

Notes

VI. Collection Phone Calls and Overcoming Objections

1. Proper Collection Calls

- a. Keep your calls _____.
- b. Use your patient's _____ to do the heavy lifting.
- c. _____ their situation, but do NOT put yourself in their _____.

2. Proper Call Length

- a. No longer than _____ minutes.
- b. What is the one exception? _____
- c. Do NOT get caught up in _____
- d. Maintain _____ by _____ with them.

3. Your Patient's Minds Will Do Most of the Work

- a. Make a solid effort to collect on the _____ call.
- b. If no payment, plant a _____
- c. Wait for a _____.

4. The Call Back...Be Ready for it

- a. Be as _____ as you possibly can.
- b. Remember to ask “how much _____? NOT “how much can you _____.”

Why? _____



- c. Get them to pay _____ today.
- d. Make sure you have _____ ways for them to pay.

Why? _____

5. Proper Emotions & Care

- a. Be _____ and _____.
- b. It’s ok to _____ with them, but realize _____ else accepts this.

6. Repetition is the KEY

- a. _____ practice makes perfect.
- b. You should now be able to ask for _____ payment methods and be able to ask more than _____.

GOING PAPERLESS CHECKLIST

5 Ways to Make More Money Going Paperless with your Payment Processing:

1. Better “Rewards” – PayJunction’s platform minimizes additional “mid-” and “non-Qual” fees.
2. Lack of PCI hassles due to PayJunction’s patented security protocols. Your office will never have to run quarterly scans or pay non-compliance fees.
3. Open AR 24/7 – Not only can you process payments at your office, but we’ll help put a “Make A Payment” button on your existing website.
4. “Recurring” billing of cards/checks on file allow convenient “set it and forget it” payment plans
5. Eliminate “Chargebacks” – Only PayJunction can offer REMOTE signature capture for “card not present” transactions.

3 Things Your Admin/Owners Appreciate:

1. Confidence
2. Simplicity
3. Freedom

3 Things Your Clients Appreciate:

1. Confidence:
2. Convenience
3. Modern Feel

Extra Notes and Ideas: