

Financial Manager's Checklist

- "How has your visit gone so far? Any questions?"
- Review treatment plan with patient
- Give total case fee (don't initially itemize)
- Have patient sign treatment plan form
- Discuss insurance
 - estimate; similar to a "rebate"
 - deductible
 - pre-determination (only on patient request)
 - ♦ give to appointment manager for tracking
- Review Financial Policies
 - discuss actual discount amounts with new total
 - utilize patient financing company(s) payment grids
- Ask closing question (and wait.)
- Handle patient objections or questions
- Get applications and submit
- and/or* Fill out Financial Arrangement Form with patient signature
- Review Treatment Consent Form with patient signature (and Dental Materials Fact Sheet, if applicable)
- Review HIPAA Privacy Policy Acknowledgement
- Appoint patient (using alternate of choice)
- Review cancellation policy if appropriate
- Collect today's payment
- Walk-out statement printed and copies of forms for patient
- Folder assembled with paperwork, treatment brochures, business card, and appointment card
- Congratulate patient on good decision