



# The 4 C's of Patient Collections: Change, Coach, Cater and Collect

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Brightree Patient Collections

# Objectives

- Discuss and review current patient collection strategy and how that may look today
- Explore and establish policy changes encouraging collecting from patients
- Learn how to develop internal training among all departments focusing on patient collections

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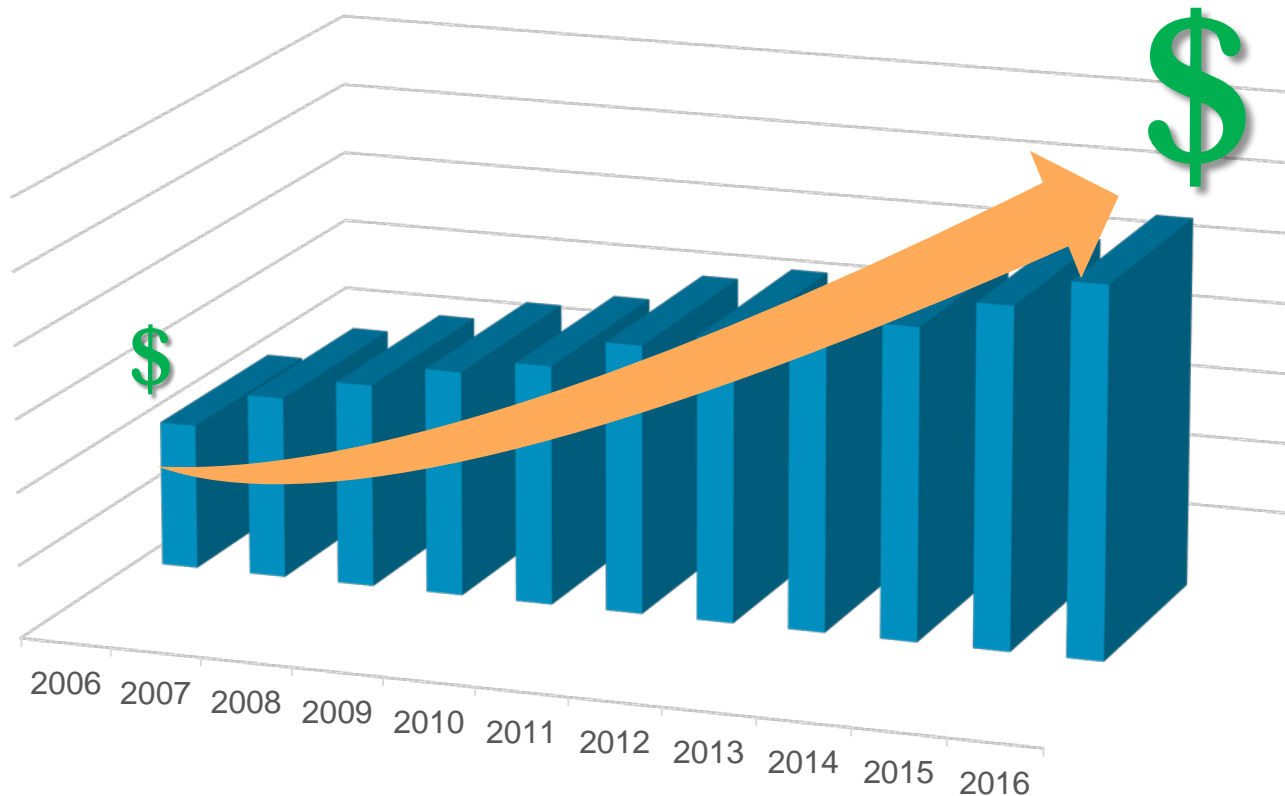
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**CHANGE**

# Why change?

## Average Health Insurance Premium (for Individuals) 2006 - 2016

According to the CMS, the average health insurance premium for an individual has increased by **255%** since 2006.



# The why's and how's

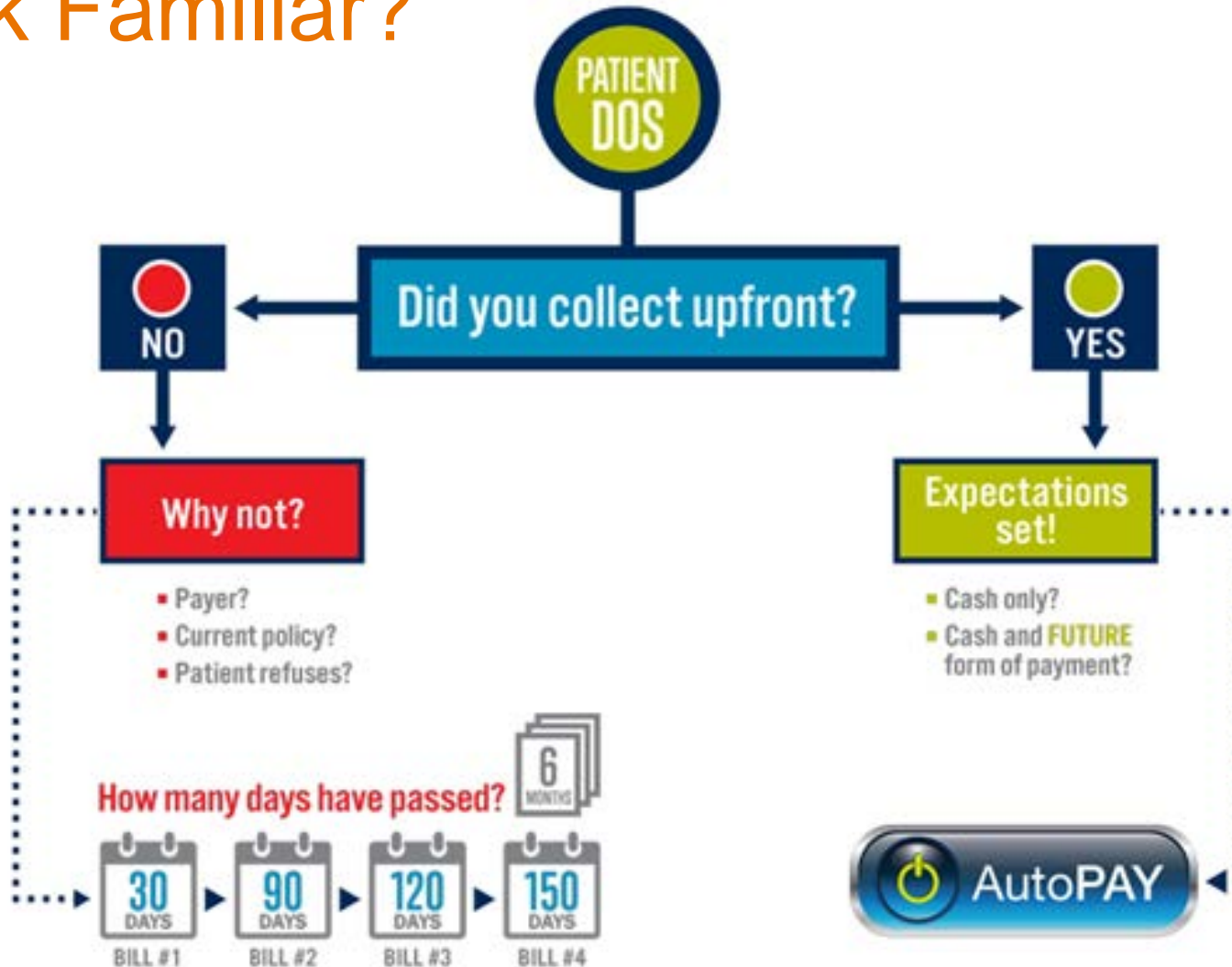


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**COACH**

# Look Familiar?




# Internally coach

- ALL STAFF
  - Business Development,
    - Referring Physicians
    - Hospitals/Facilities
  - Operations
    - Intake – THEY SET THE TONE!
  - Billing
    - Back end can set the tone as well
  - Logistics
    - Delivery drivers
- One team – same message....

**We MUST collect from our patients!**



# Externally coach



**CAPE MEDICAL  
SUPPLY**

Referrals & Customer Service: **800-339-3322**  
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## AutoPay


Get Started with AutoPay

1. Sign on to [www.CapeMedical.com](http://www.CapeMedical.com) and click on the 'Billpay' link in the top right corner
2. Click on the 'make payment' image
3. Click on 'create your profile' and quickly fill out the needed information.
4. Once complete click on 'user profile' and you can easily add banking information, sign up for AutoPAY and even sign on for eDelivery of invoices.




AUTOMATIC

Never worry about missing a bill again. AutoPay will automatically have you pay your bill when it comes due - no more remembering to send checks or use the credit card. If your medical needs change, your billing profile changes along with it.



SECURE

Rest assured that we will never share your payment information with anyone, and that our payment partners utilize state of the art encryption and security measures to ensure your information stays safe and confidential.



SMOOTH

AutoPay works like paying an automatic toll. You use your equipment and we worry about the billing. You will always receive a notification before we process an automatic payment. Set your profile up once and we'll take care of making sure you get the equipment you need without any billing headaches. If you have any problems, our award winning Customer Service team is ready to assist you.

3 out of 4 people are  
confused by their  
healthcare bills



I was too..



# Externally coach

- Watermark advises patient of AutoPAY
- Remit coupon shows the date the account will be charged
- Market your Patient Portal
- Continue to give patient time to dispute the charge and/or arrange finances accordingly (AutoPAY can charge 10-20 days after invoice mailed, per your configuration)
- Patient will get a new invoice for every new date of service
- eDelivery should be made mandatory as best practice for AutoPAY patients delivering notification of invoice faster

**Change of Insurance?**  
Please notify us if any of your insurance information has changed.

**Home Medical Equipment, Inc**  
456 Address Ave  
Anytown, ST 12345-1234  
Pay online at: [www.HomeMedicalEquipment.com](http://www.HomeMedicalEquipment.com)

Account Number: 38412  
Due by: **Dec 15, 2014**  
Patient Name: Jackie Smith  
Patient owes: **\$207.75**

**Billing Questions**  
(555) 555-1234  
Monday - Friday  
8:30 AM - 5:30 PM

**Important Messages**

- Any insurance provided has been applied; please reference your explanation of benefits.
- The balance shown is your responsibility.
- A service charge may apply if payments are late.

Pay online at: [www.HomeMedicalEquipment.com](http://www.HomeMedicalEquipment.com)

**Insurance on File**  
Medicare  
Blue Cross Blue Shield

**Invoice 52871**

DATE	DESCRIPTION	AMOUNT
10/11/14	Oxygen concentrator DEVILBISS	\$45.50
10/11/14	CPAP Humidifier For S-6	\$78.00
10/11/14	DNJUCPAP/NIV Mask FF Mirage MD	\$84.25
<b>Total:</b>		<b>\$207.75</b>

PLEASE DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT

**Home Medical Equipment, Inc.**  
P.O. Box 13150  
Overland Park, KS 66282

**AutoPAY is ON.**  
Your account will be charged on Dec 15, 2014

Late after: **Dec 15, 2014** Patient owes: **\$207.75**

Account #: 38412 Invoice#: 52871 - 10/11/14

**John Q. Smith**  
1234 Main Street  
Anytown, ST 12345-1234

Home Medical Equipment, Inc.  
456 Address Ave  
Anytown, ST 12345-1234

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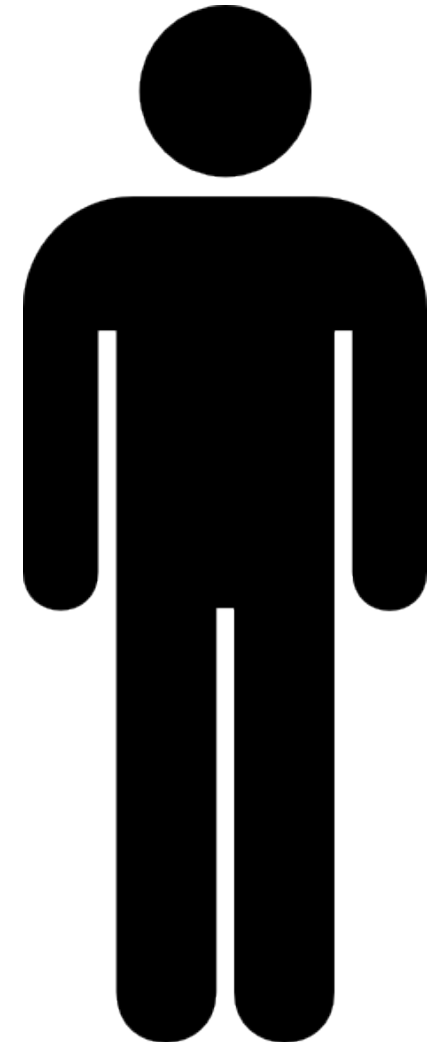
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**CATER & COLLECT**

**Cost Effective**  
**Complete Care**  
**Fast & Easy**  
**Security**  
**Quality**  
**Compassion**





Need to talk to someone?  
 Email [contact@classicssleepcare.com](mailto:contact@classicssleepcare.com) or call us toll-free on (888) 707-2454

0 Items (\$0.00)



We provide concierge-level care for sleep apnea patients.

## Why choose Classic?



Sleep is our sole specialty  
 We only work with sleep apnea



All patients receive the highest quality machines



We achieve outstanding compliance rates



You can find us across the nation

In 2 ½ years....

- 10,200 **one-time** payments
- \$1 million in **one-time** payments
- 3400 **registered** patients
- \$1.1 million in **registered** payments

**\$2.1 million Collected**

Sign in to your profile

@ Your Email

🔒 Your Password

Sign in

Forgot your password?

## Invoice Payment Center

Create a profile now and save time paying invoices in the future.



Make payment



Create your profile

### easy to **view**

Invoices are organized in one place to make it easy for you to stay on top of bills you owe and those you've already paid.

### easy to **track**

With the payment history, you can see and download a record within the invoice payment center of every payment you make, a handy feature especially at tax time.

### easy to **pay**

Your profile can include accounts for family members in your care so you can pay one invoice or all with a few quick clicks.



Dashboard View Invoices Payment History User Profile

**You have 2 invoices past due**

Claire Patient  
Account #: 59862

### Open Invoices

[Make payment](#)

Invoice #	Service Date	Due Date	Original Amount	Balance Due
526859	Aug 26, 2016	Sep 01, 2016	\$125.00	\$100.00
433683	Aug 28, 2016	Sep 03, 2016	\$38.20	\$28.20
625989	Oct 18, 2016	Oct 24, 2016	\$179.00	\$154.00

Paid Invoices

Invoice #  
No invoice h

List of open invoices

Payment History

Dashboard View Invoices **Payment History** User Profile

Claire Patient  
Account #: 59862

### Payment History

[Download payment history](#)

The following list includes payments initiated while you were signed into your payment center profile. Payments made without signing into your profile are credited to your account, but cannot be stored in the system and are not included in your payment history

Transaction ID	Date	Status	Type	Amount
2002219820	Oct 20, 2016	Approved	Credit Card (* 1111)	\$28.20

[Dashboard](#)
[View Invoices](#)
[Payment History](#)
[User Profile](#)

### Contact information

First name

Claire

Last name

Patient

Email address

cpatient@strategicar.com

Phone number

(915) 898-2342

Save changes

Change password

### Payment methods



Credit Card: \*\*\*1111

Name: Claire Patient

Expiration: 5/20

Edit > Delete >

Add new payment method

### Patient accounts



Claire Patient

Patient Account #: 59862\*

 AutoPAY Enabled

Edit >

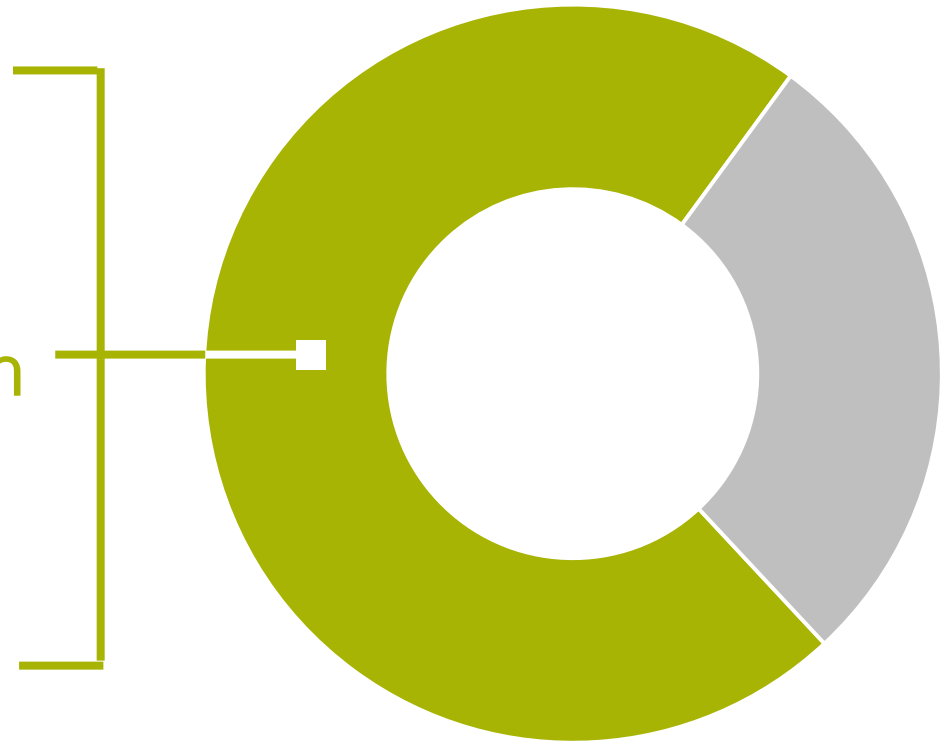
Add patient account

- Set up AutoPAY & eDelivery
- Add multiple payment methods
- Add multiple family members
- Self-sufficient patients
- **No more 'I need a copy of everything I paid' calls**

# Catering & Collecting – AutoPAY



**72%** of consumers prefer to pay medical bills electronically, with either payment cards or digital wallets



# AutoPAY is...

- A money transfer schedule to pay a recurring bill on said due date
- Secure, encrypted & PCI compliant
- Notification of amount due BEFORE it's charged (remember invoice)
- An insurance policy – 100% coverage, 97% of the time

# Catering & Collecting

## Provider

- Patient DSO decreases
- No more past due letters
- Save time & labor resources
- No 3<sup>rd</sup> party collection agencies
- Lowers costs such as postage
- Patient loyalty



## Patient

- No more late fees
- Advance notice of charges
- Easy and convenient
- Saves on postage
- Caregiver – easy to manage



# Sanford Health Care

- Headquartered in Fargo, ND
- 8 locations serving North Dakota and Minnesota
- Bill \$50,000 monthly average (AutoPAY)
- Running since January 2016
  - \$335,000 in total AutoPAY payments
  - 4,000 AutoPAY patients
  - Recurring monthly average \$47,000 – **EASY MONEY!**

**Collecting 96% of everything billed on  
AutoPAY!**

# Consolidated Health Services

- Headquartered in Elgin, OH
- 10 locations serving Iowa, Nebraska, and Ohio
- Bill \$133,000 monthly average (AutoPAY)
- Running since June 2015
  - \$1,300,000 in total AutoPAY payments
  - 14,000 AutoPAY patients
  - Recurring monthly average \$120,000 – **EASY MONEY!**

**Collecting 90% of everything billed on  
AutoPAY!**



# AeroCare

- Headquartered in Orlando, FL
- Nationwide locations
- Bill \$82,000 monthly average (AutoPAY)
- Running since March 2016
  - \$980,000 in total AutoPAY payments
  - 19,000 AutoPAY patients
  - Recurring monthly average \$64,000 – **EASY MONEY!**

**Collecting 91% of everything billed on  
AutoPAY!**

# What's New & Coming Soon...

## Patient Sync

**Patient: Abbott, Jack** Edit New Sales Order New Pickup/Exchange Strategic AR MyForms ?

Patient ID 10337    Gender M    Height in.    Branch Office Kings Landing    HIPAA No    SSN No SSN  
 DOB 2/10/1945 (71)    DOD    Weight lbs.    Account    SOF    [View Full SSN](#)

Summary   Personal   Contacts   Clinical   Insurance   Notes   **Financial**   Orders   Custom Fields   Documents   History

Invoices   Aged Balances   Unapplied Payments   Denials   Statements   Payments on Account   RC Activity   **Strategic AR**

General	Financial
AutoPAY Status Never set up	Current Amount \$78.75
eDelivery Status Never set up	Past Due Amount \$34.25
Payment Plan Electronic - Active - \$34.00/mo	Agency Collection Amount \$115.50
Information	Invoices at Agency 103766

**Patient** [Select All](#) | [DeSelect All](#)

Last Name     First Name     Middle Name     Suffix     ID  
 DOB     Month of Birth     Day of Birth     SSN     Account Number

Security Group     Restricted Access     Preferred Contact Type     SAR AutoPAY Status     SAR eDelivery Status  
 SAR Payment Plan     SAR Information

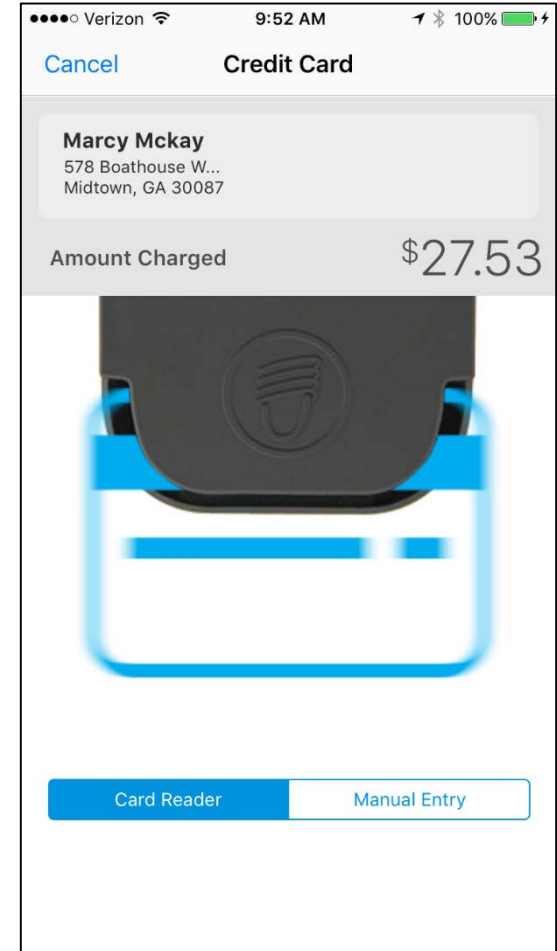
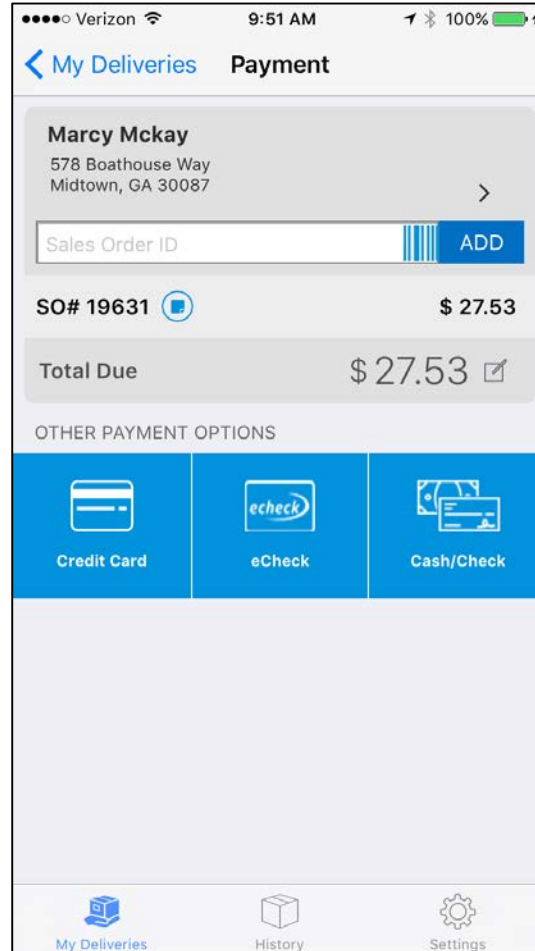
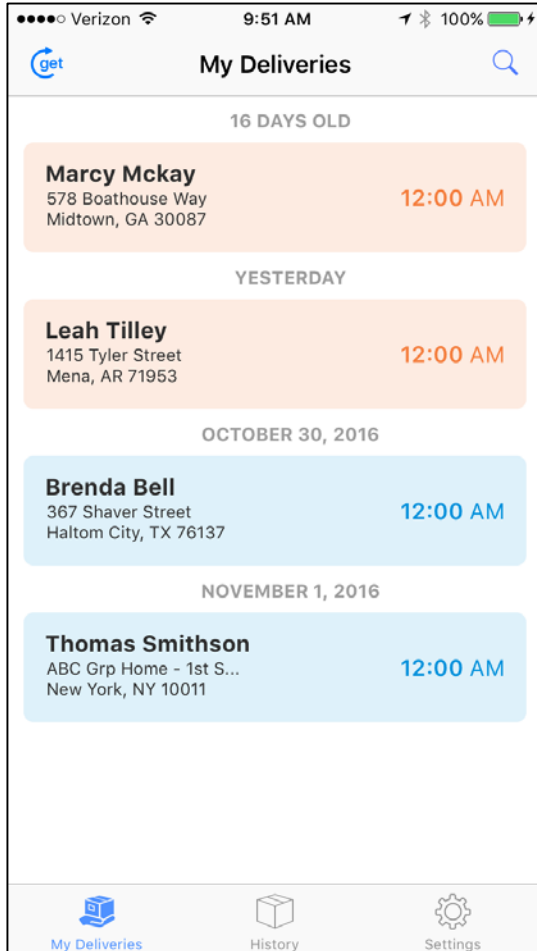
User 2     User 3     User 4     POS     Key  
 HIPAA signature     Customer Type     Facility     Prior System Key     Include in CMN Auto Renewal  
 Security Group     Restricted Access     Preferred Contact Type     SAR AutoPAY Status     SAR eDelivery Status  
 SAR Payment Plan     SAR Information



**Almost two-thirds of consumers expressed interest in using mobile payment systems for healthcare bills.**

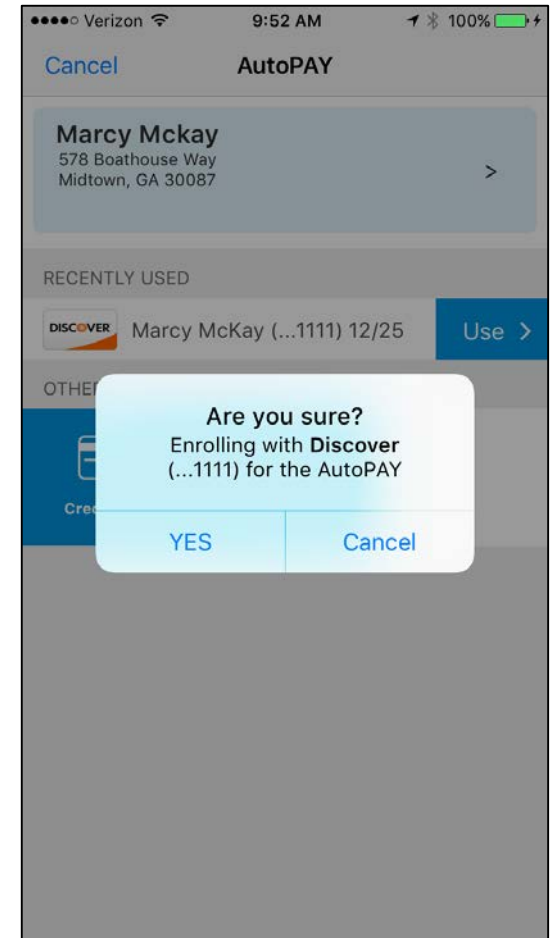
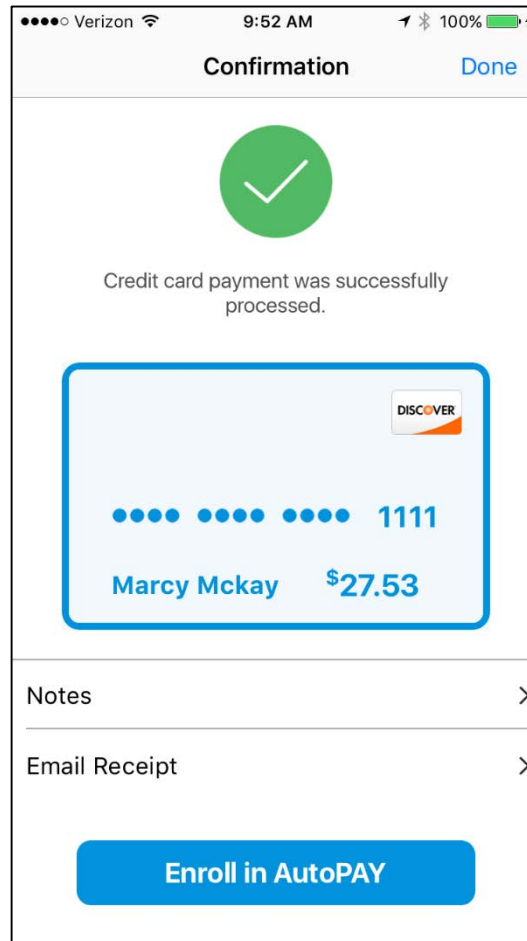
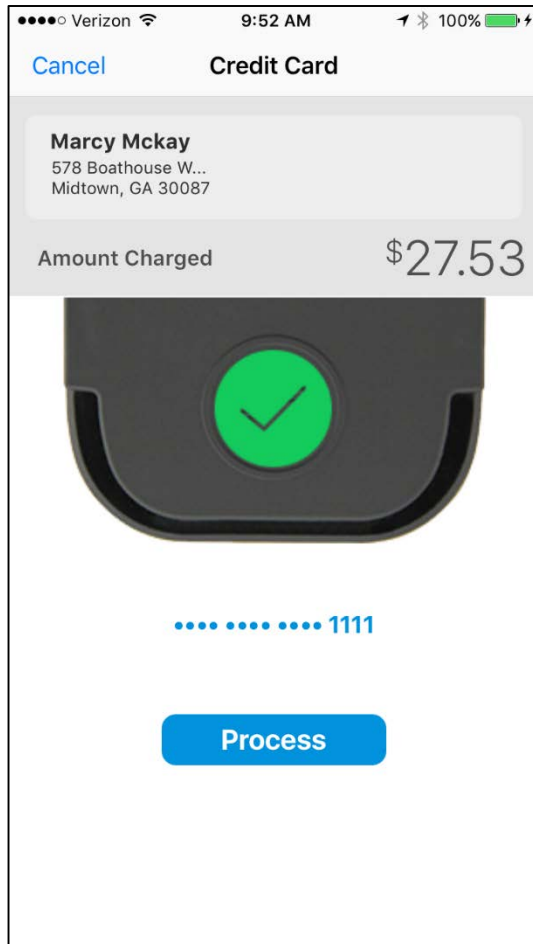
# What's New & Coming Soon...


## GetPaidHME – Mobile Payment App



# What's New & Coming Soon...


## GetPaidHME – Mobile Payment App



 **Change – your outlook**

 **Coach – policy**

 **Cater – to changes**

 **Collect – your money**



*‘We are really competing against **ourselves**, we have no control over how other people perform.’*

– Pete Cashmere, CEO of Mashable



# Thank you!

Jennifer Leon

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913.744.3360