



A Journey in Financial Improvement
Upfront Collections
Developing | Your Program


 **Iowa Rural Hospital Learning Opportunity Program** 

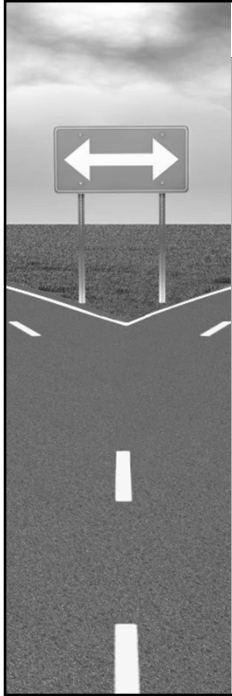
Provided by the Iowa Department of Public Health and HomeTown Health through the HRSA Critical Access Hospital FLEX Grant 2017-2018, Iowa Grant #5888CA04.

Learning Outcomes

Recognize the importance of upfront collections

Learn how to create a successful upfront collections program





Two Important Elements

Comprehensive Training
Accountability

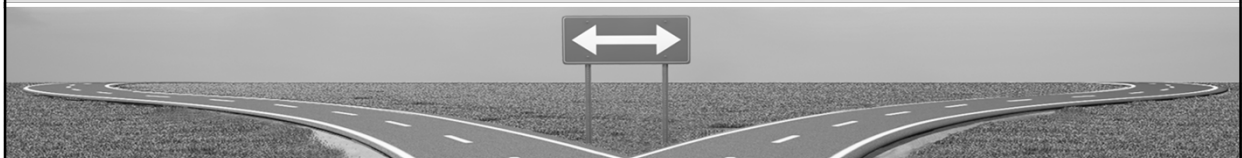
Step One

Get management cooperation and support

Include your C-suite for support and authorization of rewards and accountability

Assist with removing barriers and providing resources

Visibility of management is important to front line staff it gives staff an understanding of how important the program is to the hospital



Step Two

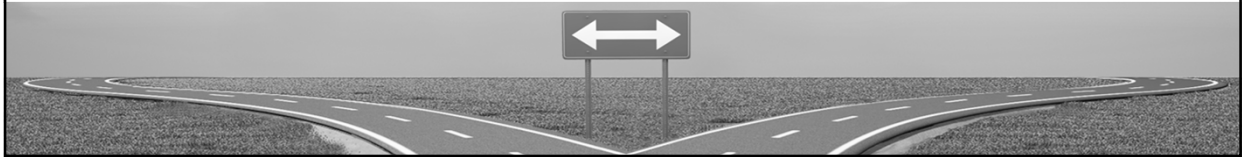
Determine and set goals for staff

Point of Service (POS) collections should be approximately \$20/registration

Get input from staff

Set goals based on revenue and volume of patients in each area

Increase goals as program progresses



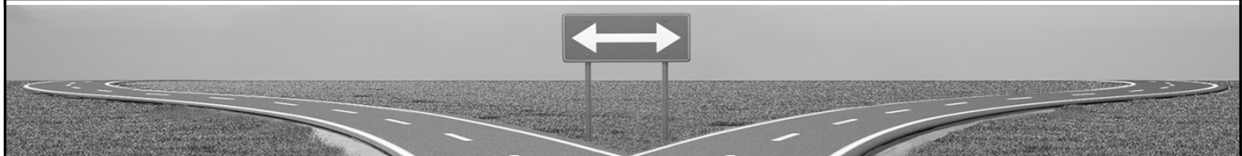
Step Two

Determine and set goals for staff

Performance targets should be a number that can be tracked

Use a ladder of targets with a different reward attached to each

Use visual aids to track progress posted in staff areas



Step Three

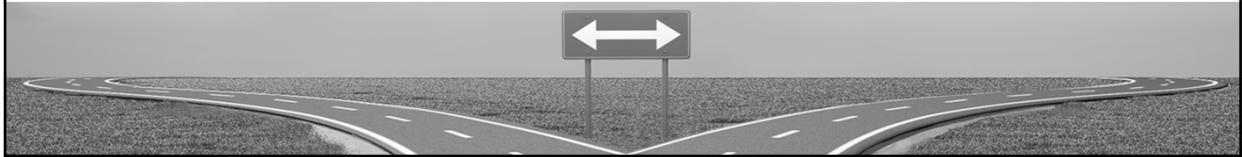
Create a system of reward and accountability

Use group and individual goals and rewards

Use non-financial incentives when possible

Engage staff for motivational incentive ideas

Work with C-suite to determine monetary rewards



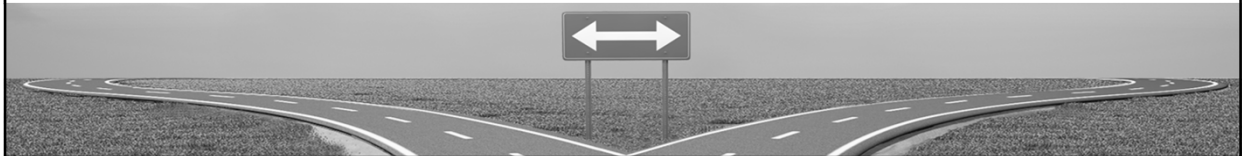
Step Three

Accountability

There should be consequences for not meeting goals

Impress on staff that this is not an optional program

Complacency leads to having staff that are not engaged in the process



Step Three

Accountability

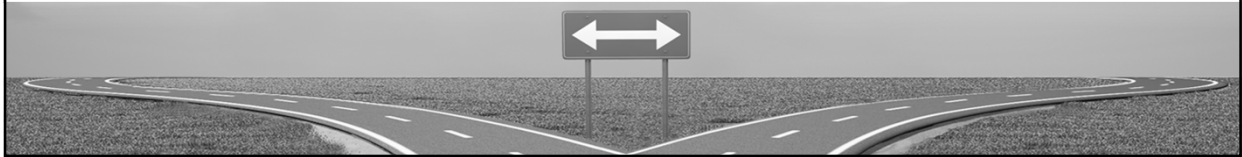
What should you do if you aren't meeting goals?

Shadow your staff to determine what the barriers to POS collections are in the area.

Solicit staff input

Determine what can be done to improve the process

Have set penalties for missing goals



Step Four

Provide staff training!

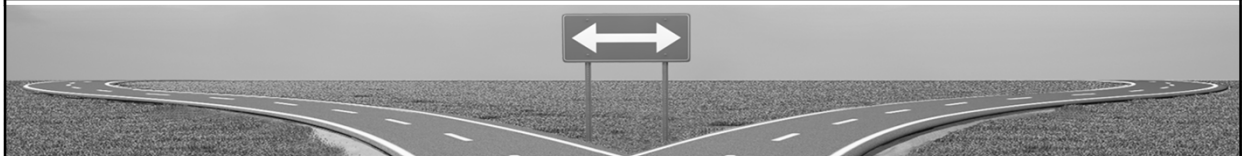
Explain the Why

Why do we need to increase collections?

Why will it increase patient satisfaction?

Why now?

Why isn't it optional?



Step Four

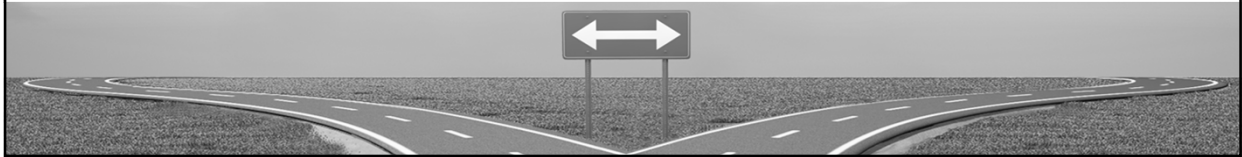
Provide staff training!

Train in customer service, scripting and financial counseling in line with your financial assistance policies

Include estimating liability, discount calculations, payment plans, FAP policy, revenue cycle impact

Role play scripting while training

Teach staff to be assertive not aggressive



Step Five

Identify a Champion!

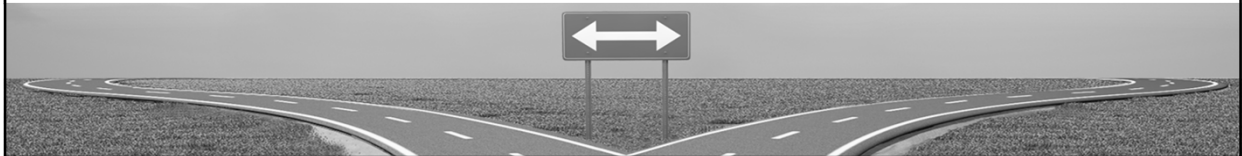
Find an engaged and motivated staff member to champion your campaign

Who is excited?

Who understands the need for collections?

Who has a positive attitude?

Who has good relationships with the other staff?



Step Six

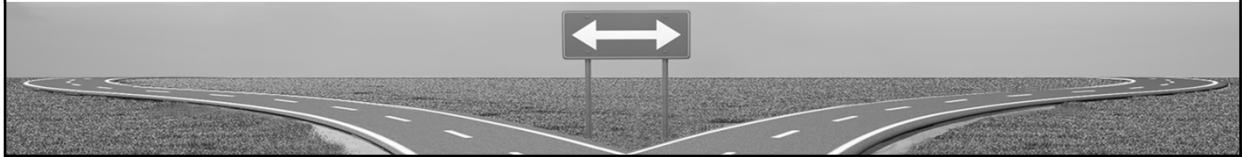
Implement your plan

Implement the plan when key staff are working

Monitor for barriers

Watch for staff that are not participating and find out why

Encourage and praise staff that impress you and are successful



What's Next?

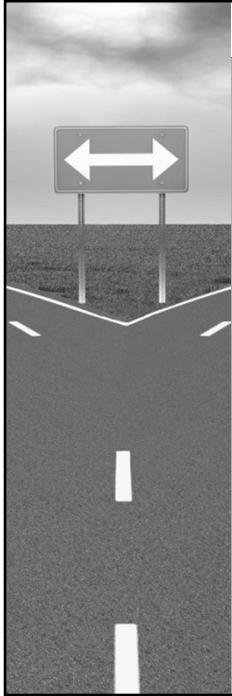
Evaluate your Success

Track your Success

Publish your Progress

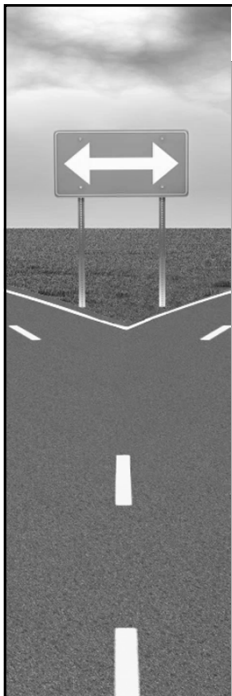
Give Immediate Feedback

Reward and hold accountable



Collection Tips

- Don't make it one size fits all, customize by department
- Practice scripting as much as possible
- Increase targets at intervals
- Educate physicians
- Establish minimum collection target for elective procedures
- Create a POS collection manual



Best Practice Solutions

- Online registration
- Registration kiosks
- Educating patients on financial options
- Presumptive Eligibility screening
- Online portals for account access (view/payment)
- Accept credit and debit cards
- E-statements
- Payment plans
- Loan Options

What can stop us?

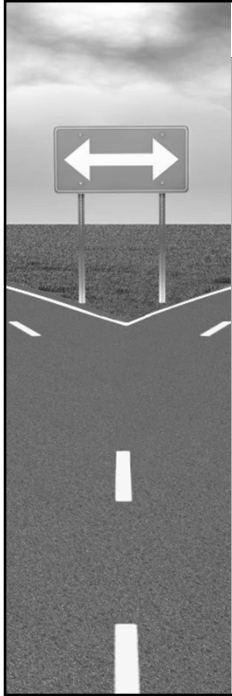
- Difficulty estimating what the patient owes
- Feeling like asking for money is poor customer service
- Clerks that are not comfortable asking for money



What can we do?

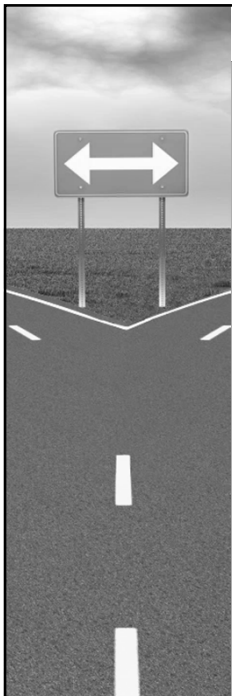
- Use pre-registration and scheduling to notify patients of their financial responsibility in advance.
- Always check for Medicaid eligibility for uninsured.
- Educate our patients on their benefits.
- Use consistent scripting for all patients.





Let's Look at Scripting!

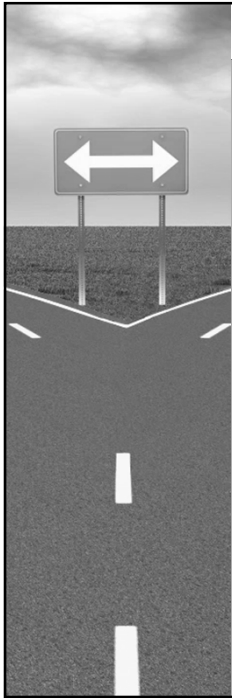
The nine most important words for collecting
How would you like to pay for that today?



Scripting

Mrs. Jones, I have verified your insurance benefits and you have a \$250 co-pay for this visit. How would you like to pay for that today? Check, credit card, debit or cash."

Don't ask her if she wants to pay today. Just ask **HOW** she wants to pay. You know how much she owes and now she does as well, so collect it upfront.



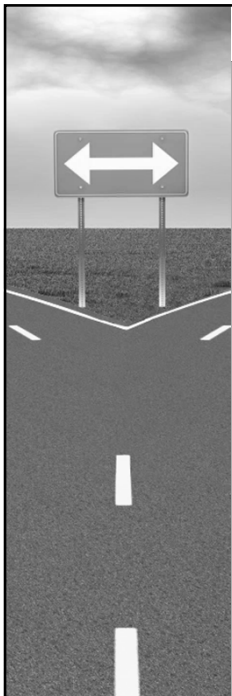
Scripting

Always tell the patient what they owe and then what the discounted amount would be

Self Pay:

“Mr. Jones the charges for today’s visit are \$500.00 but after I apply your discount of 62% you only owe \$190.00.”

(of course use your discount percentage here)



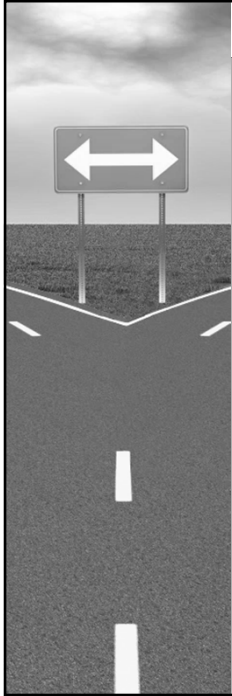
Scripting

If the patient says “My ex pays the medical bills, the court says so”

You say, “I will be glad to give you a receipt so that he can pay you back”

They say, “No he will never pay me back!”

You say, “can you call him and let him know payment is due at the time of service? We can take the payment information over the phone”



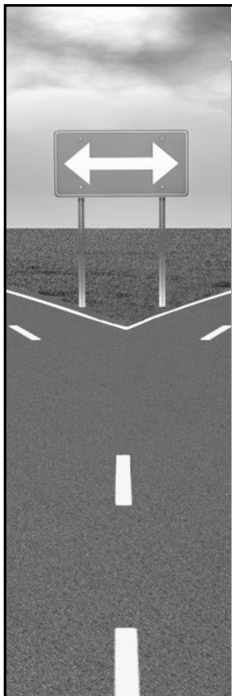
Scripting

If the patient says “Just send me the bill”

You say, “Just like at the doctor’s office payment is due at time of service, how would you like to pay for that today”

If they get upset or angry

You can say “I completely understand, we have several options for payment, let me set you up with our financial counselor and she can help you”



Consistency

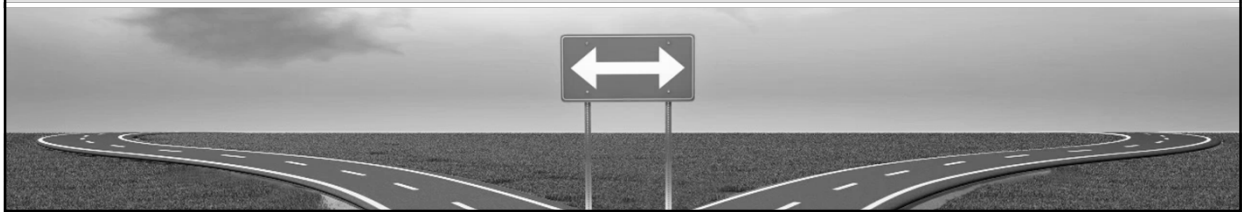
- If everyone is consistent with scripting it is much more effective.
- Be consistent in the ER as well.
- Develop processes that allow collection in each area.



Learning Outcomes

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Questions?



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