

PRACTICAL CLINICAL COURSES

*A Service of the Gordon J. Christensen
Career Development Program*

V4766

Get the Money off the Books and into the Bank!

Lois J. Banta, CEO of Banta Consulting &
Gordon J. Christensen, DDS, MSD, PhD

Materials Included:

C.E. Instruction Sheet
Products List
Clinician Responsible
Goals & Objectives
Overview
Supplemental Materials
AGD Post-Test

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PRACTICAL CLINICAL COURSES

**PROCEDURE FOR RECEIVING
CE CREDIT FOR VIDEO COURSES**

1. Complete the enclosed Post-Test.* For each **CE Video Purchased**, one complimentary test is included. Additional tests are \$35/person per test. Fees can be paid by check or with a credit card when submitting tests to Practical Clinical Courses. If more than 10 CE tests are required per video, please contact us at 800-223-6569.
2. Complete the demographic information located at the end of the test.
Type of Credit:
 - a. If the applicant selects "State," PCC will issue a certificate of verification to the applicant. The applicant must then submit this certificate to their state board to obtain credit.
 - b. If the applicant selects "AGD," PCC will submit credit information to the Academy of General Dentistry and confirmation to the applicant that it has been submitted (*the applicant may check their AGD transcript for verification – please allow 30 days*).
 - c. If the applicant selects "Both," PCC will complete a. & b. above.
3. Return the **Post-Test portion** via mail, fax, or email. Our contact information is as follows:

Practical Clinical Courses
3707 N Canyon Road
Suite 3D
Provo, UT 84604
Fax: (801) 226-8637
cetests@pccdental.com

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Sources of Products Discussed in

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Presented by: Lois J. Banta, CEO of Banta Consulting & Gordon J. Christensen, DDS, MSD, PhD

1. **Dentrix**
Henry Schein, Inc.
Corporate Headquarters
135 Duryea Road
Melville, NY 11747
(800)372-4346
(631)843-5500
www.henryschein.com

2. **EagleSoft**
Patterson Dental
Corporate Office
1031 Mendota Heights Road
St. Paul, MN 55120
(800)328-5536
(651)686-1600
www.pattersondental.com

3. **SoftDent**
Carestream Dental LLC
Corporate Headquarters
1765 The Exchange
Atlanta, GA 30339
(800)944-6365
www.carestreamdental.com

Product names, the products themselves, and company names change rapidly. Please contact the companies shown to confirm current information.

Gordon J. Christensen Practical Clinical Courses, 3707 North Canyon Road, Suite 3D, Provo, UT 84604
Toll Free (800) 223-6569 or Utah Residents (801) 226-6569

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PROGRAM

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CLINICIANS RESPONSIBLE:

Gordon J. Christensen, DDS, MSD, PhD

*Founder and CEO, Practical Clinical Courses
Senior Consultant & Previous CEO, CR Foundation
Practicing Prosthodontist, Provo, Utah*

Lois J. Banta, CEO

*CEO & Founder of Banta Consulting, Inc.
CEO & Owner of The Speaking Consulting Network*

GOALS & OBJECTIVES

At the completion of this video presentation, participants should be able to accomplish the following:

1. Describe how to provide in-office training/education for staff.
2. List ways for cross training/education of staff.
3. Describe how to deal with software updates as they continue to come.
4. What are available methods to better understand your software?
5. Describe how often you should check insurance claims.
6. Discuss the influence of waiting too long to check insurance claims.
7. Describe how you can document conversations with insurance companies.
8. Discuss how often you should call insurance companies.
9. Compare monitoring statistics manually or electronically.
10. Discuss aging accounts and the effectiveness of this task.
11. Describe methods for flexible financing.
12. Describe what to do when an insurance company pays.
13. Describe a successful system for sending statements.
14. Discuss and compare manual and electronic statements.
15. Discuss whether or not special messages should be sent with statements.
16. Describe the Federal Fair Debt Collection Practices Act.
17. Discuss whether or not you should contact your State Attorney General's office relative to a debt.
18. Discuss what to tell patients about their financial responsibility on the new patient phone call.
19. Discuss how to handle objections.
20. Describe how to discuss insurance characteristics with a patient.

OVERVIEW

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This presentation is planned to assist dental personnel to make plans and carry out the best possible financial policies for their specific practice. The following and other topics are included:

- Making your software system work for you
 - Live-in office training/education
 - Updates, time to sharpen your skills
 - New team members and training/education
 - Cross train for efficiency
 - Use available tools
 - Inspect what you expect of your reports
 - Be consistent
- Insurance claims don't track themselves
 - Check insurance claims often
 - Don't wait until it is too late
 - Call the insurance company monthly
 - Know their name
 - Document everything in the conversations
 - Don't get mad, be nice
 - Communicate with the patient, help them help you
- Collecting the money
 - Use your software for its intended purpose
 - Monitor statistics manually or electronically
 - Monitor accounts receivable aging report consistently
 - Document every conversation
 - Follow-up and follow through
 - Offer flexible financing
- Sending statements
 - Send statement as soon as insurance pays
 - Have a specific system for sending statements
 - Electronic or manual statements
 - Special messages
 - Statement review
- Know the collection laws
 - Final notices
 - Collection actions
 - The Federal Fair Debt Collection Practices Act
 - Your state Attorney General's office
 - The phone calls
 - Communicate, inform before perform
- Payment at the time of service, what a concept!
 - The new patient phone call - help them own the financial responsibility
 - Changing old rules
 - Handling objections
 - Verbal skills vs. visual aids
 - Be positive, confident, and matter of fact
 - Be thorough, explaining insurance payment guidelines, etc.

SUPPLEMENTAL MATERIALS

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1. Banta LJ. Secrets to Practice Success. Kansas City: Banta, 2013. Print.
2. Banta LJ. 10 Top Management Tools for a Successful Practice. Dental Economics. 2012 Oct;102(10):99-104 quiz 105.
3. Banta LJ. THE A.M. HUDDLE – DENTISTRY’S SECRET WEAPON FOR SUCCESS! Dental Economics. 2013 Apr;103(4):46.
4. Banta LJ. STAYING CONNECTED – INSPECT WHAT YOU EXPECT. Dental Economics. 2013 Oct;103(10):42.
5. Cascardo D. You must have financial office policies in place to maximize your profits: part I. J Med Pract Manage. 2012 Jul-Aug;28(1):9-12.
6. de St Georges JM. Your money: requesting and collecting what’s due. J Calif Dent Assoc. 1995 Aug;23(8):53-4.
7. Jupp A. Hiring and training staff for financial procedures and collecting money from patients. Br Dent J. 1994 Oct 22;177(8):302-5.
8. Aquino F. Decisive dealings with collection agencies. Med Group Manage. 1986 Nov-Dec;33(6):46-7, 58.

POST-TEST

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1. Training new personnel about computer software:
 - a. should always be delegated to manufacturer reps.
 - b. should not be done by other experienced staff.
 - c. can be done by experienced staff.
 - d. is not often needed.

2. Insurance claim(s):
 - a. should be checked very often.
 - b. often require calling the respective company.
 - c. discussions need to be documented.
 - d. all of the above.

3. Computer software updates:
 - a. come quite frequently.
 - b. should not be implemented until you have time.
 - c. should be discussed and learned as soon as they come.
 - d. are easily understood.

4. Patients usually accept fees best when:
 - a. they have been thoroughly informed before treatment begins.
 - b. you estimate a somewhat higher amount than the actual bill.
 - c. you educate them about what you are doing during the treatment.
 - d. all of the above.

5. Insurance claims:
 - a. are the sole responsibility of the patient.
 - b. are a joint responsibility of the patient and the dental office staff.
 - c. are best settled by forceful discussions with the insurance company.
 - d. do not require follow-up phone calls.

6. Flexible financing:
 - a. does not assist in collecting money.
 - b. is a very positive aspect in influencing patient payment.
 - c. cannot be arranged easily.
 - d. is not recommended.

7. Sending statements:
 - a. should not be done when the insurance company pays.
 - b. should not have special messages sent with them.
 - c. are best sent manually.
 - d. can be sent manually or electronically.

POST-TEST (CONT'D)

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- 8. Collection laws:
 - a. encourage sending numerous final payment notices.
 - b. are defined in the Federal Fair Debt Collection Practices Act.
 - c. limit your ability to contact your state Attorney General's office.
 - d. do not allow phone calls for collection.

- 9. When changing collection rules previously set in your office:
 - a. send an official notice to patients about the change.
 - b. blend in the change without any major announcement.
 - c. attempt to hide the changes to avoid upsetting patients.
 - d. telephone all patients about the change.

- 10. When a patient objects to the payment from their insurance plan:
 - a. explain that the payment is not your decision.
 - b. explain that the amount of the payment is directly related to the level that their employer has contracted with the insurance company.
 - c. be thorough in explaining how benefit plans are set up.
 - d. all of the above.

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