Slide 1

DENTRIX

Practice Success

Collect
Payment Faster
with Online
Patient
Payments

Presented by Kelly Harper
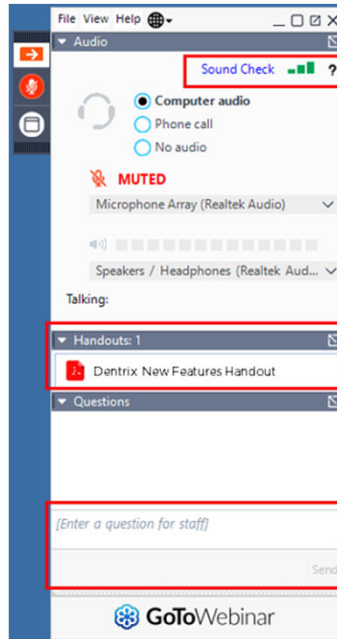
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Today's Presenter: Kelly Harper

- Over 30 years of experience working in the dental industry

- 16 years as Dentrix Certified trainer, 10 years as eServices trainer

- Provides practices across the US with a well-rounded training experience

- Passionate about training on Henry Schein products

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Make It Easy for Patients to Pay

- Healthy cash flow is fundamental to keep your practice open and functioning well

- Timely collections is a big part of that

- Ideally, patients would pay the full amount at time of service—but that's not always possible

- If you must bill a patient, make it as easy for them to pay as possible

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Give Patients Payment Options

- Give patients payment options that fit their lifestyle

- They pay other bills online—they want to pay your bill that way too

- If patients can't pay immediately after seeing their statement, there's a good chance they'll forget about it

- QuickBill Premium gives patients the option to pay online anytime, anywhere

What Can I Do with QuickBill Premium?

In this webinar we'll discuss:

- Sending Billing Statement Emails and Texts

- Viewing Email Statements from the Patient's Perspective

- Processing Online Payments

- Tracking Statement History

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Send Statement Emails and Texts

Problem: Patients Aren't Aware of Balances They Owe

- Insurance has paid, but there is a remaining balance

- Patients paid an estimated amount up front, due still owe a balance

- Patients don't answer phone calls or check their postal mail regularly for statements

- Patients on payment plans have payments that are due

Solution: Allow Patients to Pay Online

- Patients always have their phones
- Not everybody checks the mail every day, but they check their email and texts several times a day
- Patient pay other bills online, why not their dental bill
- Give them the option to pay right now from their phone

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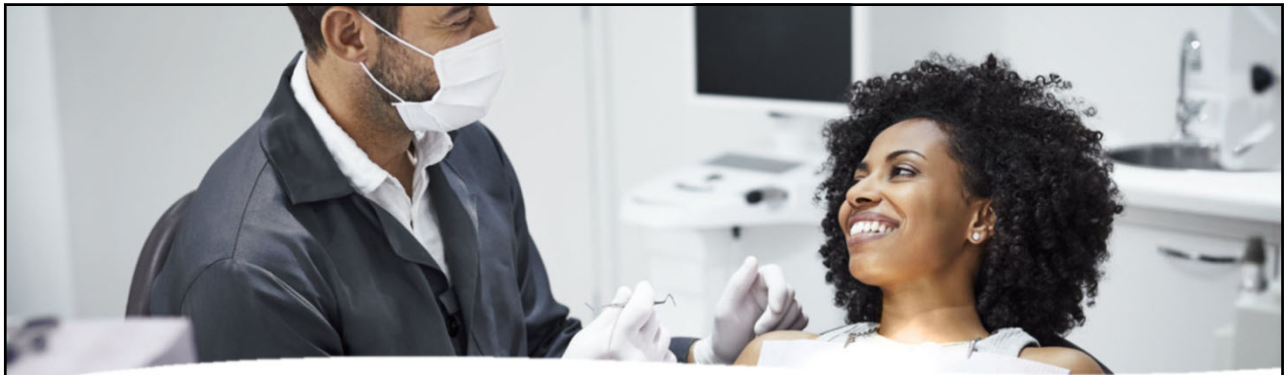
Example:

- A patient came in for an extensive treatment plan.
- She paid her estimated payment amount at time of service but knew she would meet her insurance maximum with a balance.
- She asked you to bill her for the amount she owed.

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How to Do It

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Setting Up Statement Options

View Full Video

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Tip: Move the **Balance Forward Date** back a few months so patients can see a history of treatment and payments.

Tip: Include procedures that are attached to a pending claim so patients can see what has been billed to insurance.

Setting Up Statement Options

1. In the Office Manager, click **Maintenance** > **Practice Setup** > **Preferences**.

2. Click the **Print Options** tab.

3. Check **Verify Billing Statements to Send** and **Copy Billing Statements to Document Center**.

4. Generate statements as you normally would.

Verifying Statements to Send

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Verifying Statements to Send

Guarantors appear in the Verify Statements to Send window based on your previous Statement Options.

1. Preview how the statement will look when send by mail or electronically by email or text message.

2. Check the option(s) for how the statement will be delivered: mail, email, and/or text.

3. Update missing patient information as needed:
   - Email address
   - Mobile #
   - Consent to received text messages

4. Click Send.

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Verifying Statements to Send – Things To Remember

A. Select statement delivery method(s)

B. Search for names, email addresses, or phone numbers in the list

C. Sort columns of information

D. Select an account and click Ledger button to see account details

E. Add missing email addresses or mobile numbers

F. Add or edit Guarantor Note or Billing Statement Note
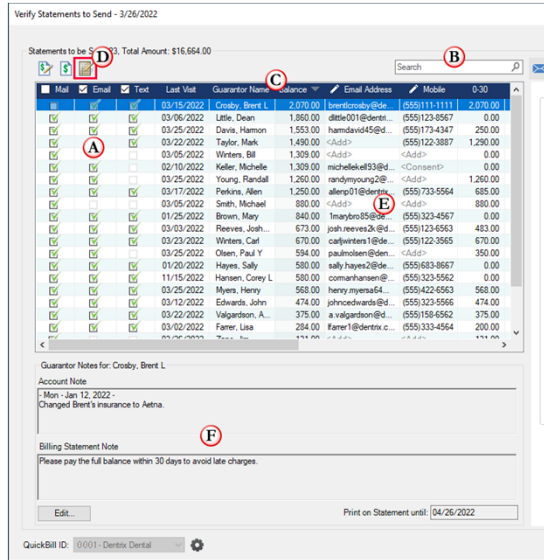
Tip: Set Preferred Statement Delivery Method

- Set a preferred delivery method for each guarantor

- If you make changes in the Verify Statements window, Dentrix will update this field to reflect that change

Sending Statements

Statements will be sent to the clearinghouse to be printed and mailed, emailed, or texted to patients, depending on your settings.

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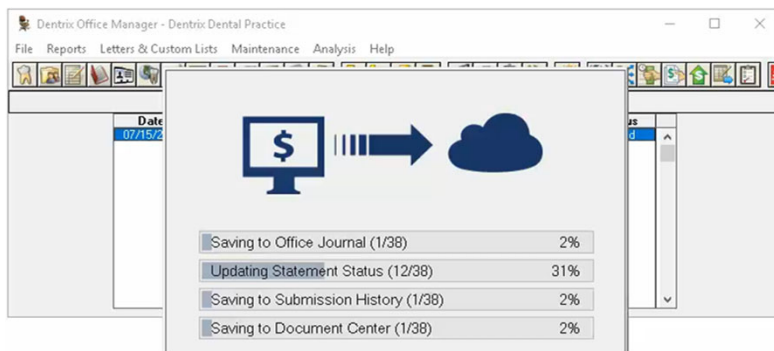
Sending Statements

When statements are sent, you'll see a pop-up to view the statement report.

We will discuss this later in the webinar.

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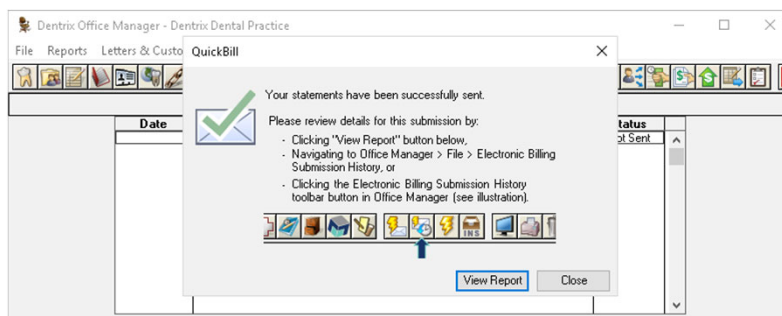
Sending Statements

A copy of the statement will be added to the guarantor's Document Center (when that option is selected during setup).
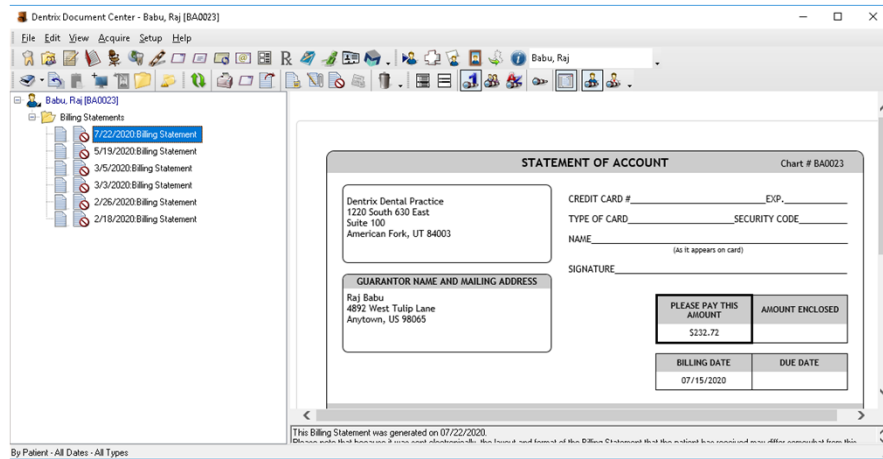
Questions about what we've covered so far?

Resources for Additional Information

▶ Video: Setting Up QuickBill and QuickBill Preferences

▶ Video: Generating Billing Statements in the Office Manager

▶ Video: Verifying and Sending Billing Statements Electronically

✉ Blog Post: Use QuickBill Premium to Send Statements Via Mail, Email, or Text

✉ Article: 5 Reasons You Should Be Sending Text and Email Billing Statements

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What it Looks Like for Patients

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Emailed Statements

Receive the Email

- Patients will receive an email from your practice

- Email will include links to view their statement and pay online

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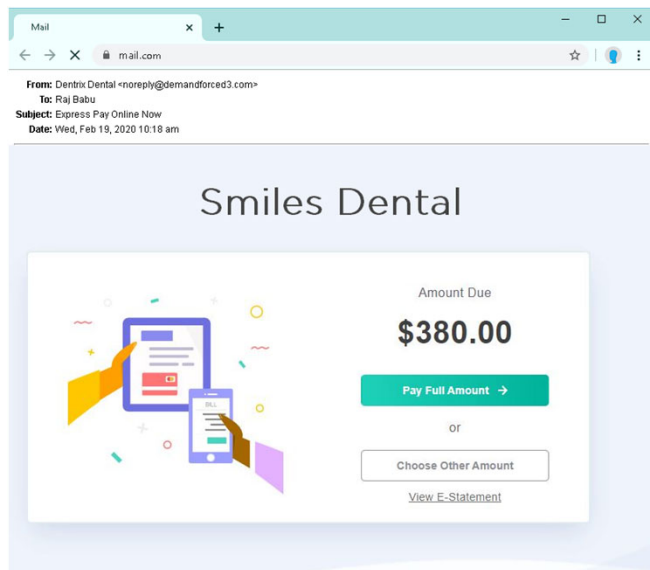
Click the Link to View Statements

- Patients are asked to verify their name and birthdate

- Once verified, their statement is displayed

Make the Payment

- Patients can pay the full amount or choose a different amount

- Both payment links open a web page to enter their payment information

Text Message Statements

Receive the Text Message

- Patients will receive a text from your practice

- Text includes link to view their statement and pay online

- Patients click the link to view their amount due

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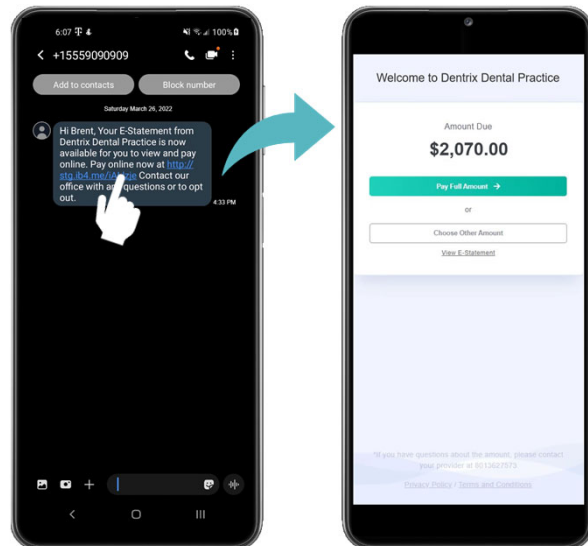
View the Statement

- Patients can click a link to view their statement and are prompted to verify their identity.

- Once verified, their statement is shown.
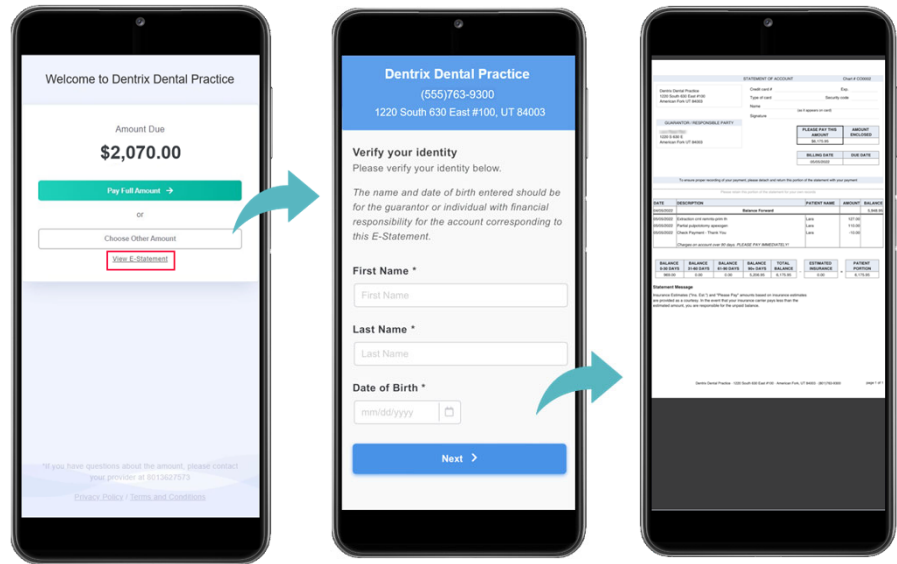
Make the Payment

- Patients can pay the full amount or choose a different amount

- Both payment options open a web page where patient's can enter their credit card information and submit payment
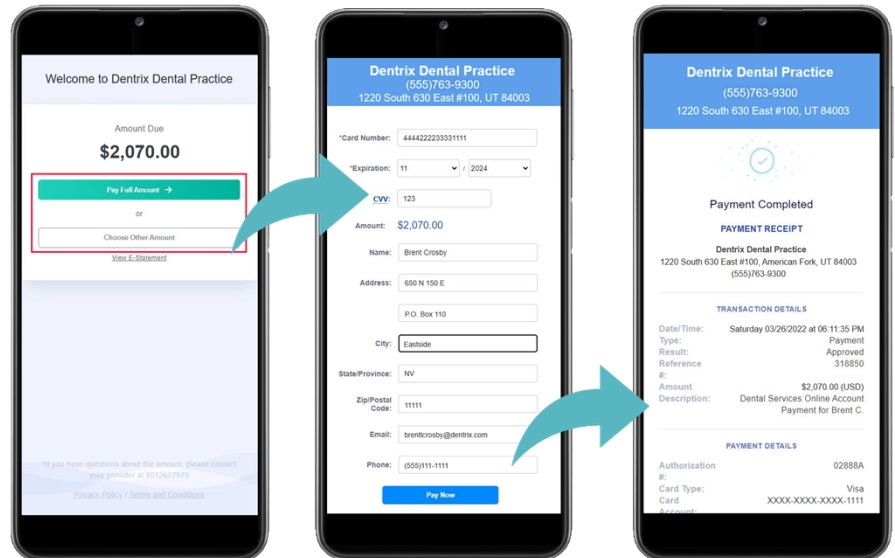
Questions?

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Processing Online Payments

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Problem: Patients Make Payments 24/7

- Patients are making payments after hours, overnight, and over the weekend
- You may not be in the office when a payment is processed
- You need to know who paid, when, and how much

Solution: Process Payments Manually or Automatically

- Choose to process payments automatically
- Choose to be notified of payments and have the option to post them in the Ledger
- Manage online payments inside the Ledger just like any other payment

Example:

- A patient paid her full amount due online.
- Her amount due included balances for her and her son.
- You need to post the payment and split it so that it is applied to both accounts.

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How to Do It

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Import Payments Automatically

1. In the Office Manager, select **Maintenance > Practice Setup > Import Payment Settings**.

2. Select **Automatically Import Online Payments**

3. Under **Payment Type for Imported Payments**, select the payment type that online payments should be posted as in the Ledger.
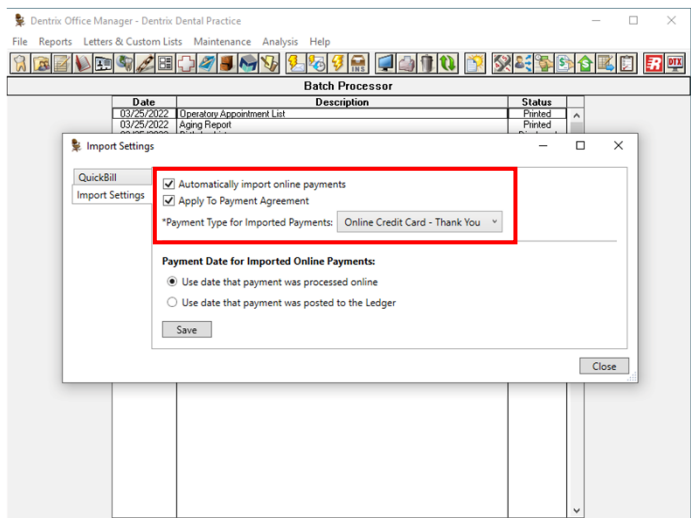
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Import Payments Automatically

When you select Automatically Import Online Payments, payments will appear in the Ledger without additional steps required.
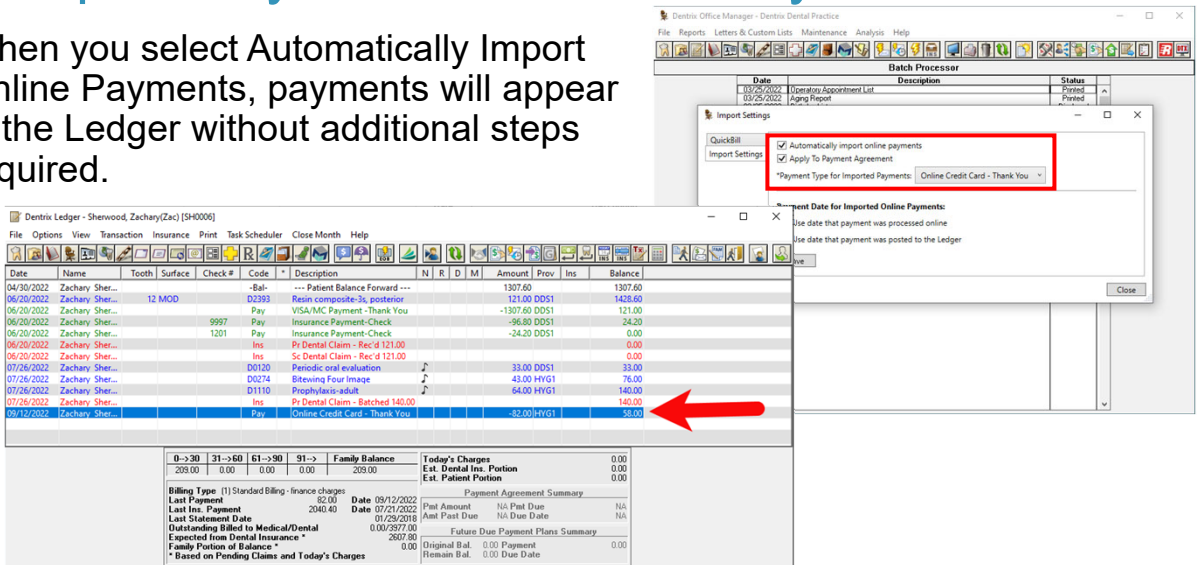
Payments posted automatically are just like any other payment you enter manually.

Double-click the payment to edit, split, or reallocate as needed.

These payments also show up on the same reports as regular payments.

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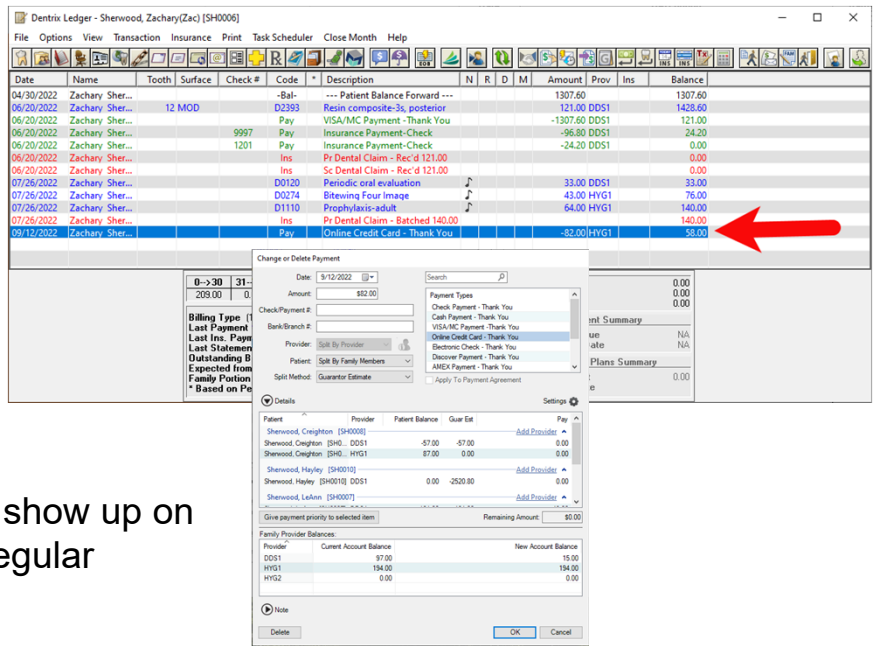
Import Payments Manually

If you don't select **Automatically Import Online Payments,** when online payments are received, and alert will appear.

Click the button in the alert or click **Import Online Payment** from the Ledger toolbar.

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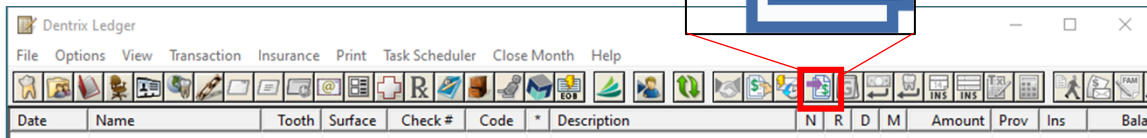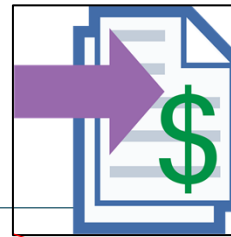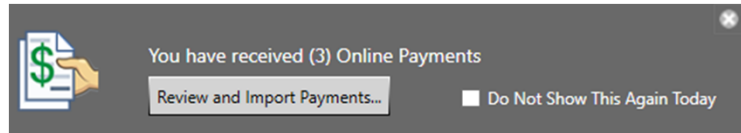
Post Selected Payments

1. Select the account payment(s) you want to post.

2. Click **Post Selected**.

The payments will be posted to each guarantor's Ledger.
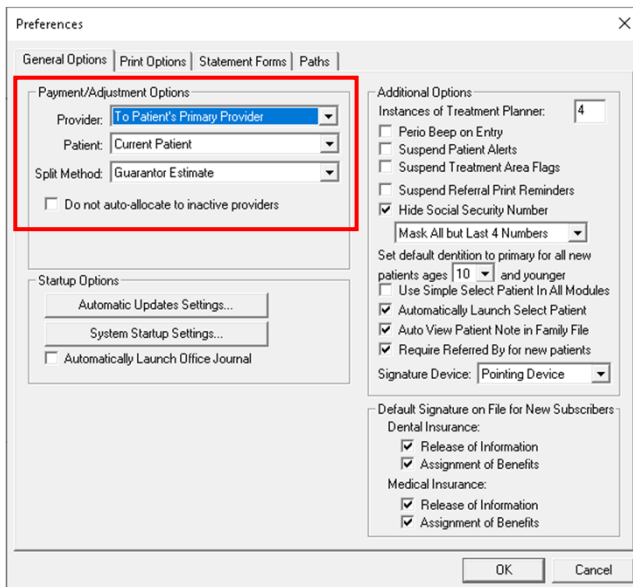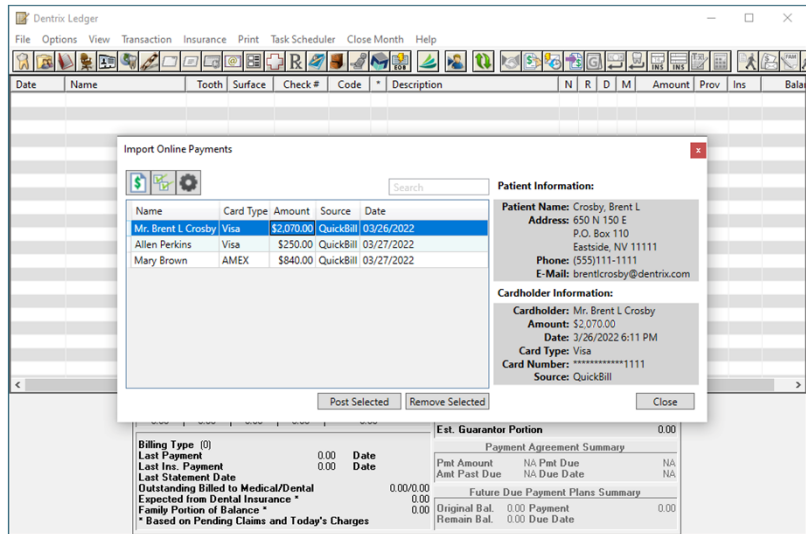
Online Payments will be split according to your Payment/Adjustment Options.

Manage these settings in the Office Manager under **Maintenance > Practice Setup > Preferences, under General Options**.

Split or Manage Payments

1. After payment is posted, open the guarantor's Ledger and open the online payment.

2. Split the payment or edit the payment details as needed.

Questions?

Tracking Statement History

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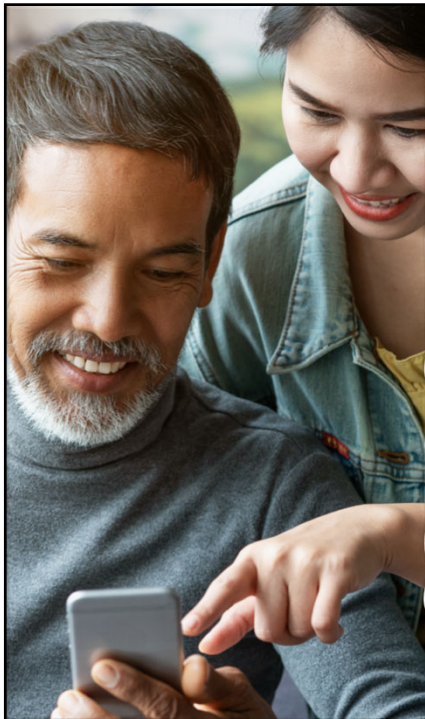
Problem: You Need to Have Access to Statement History

- When patients call with questions, it's easier to answer them if you can see the same statement they're seeing

- Patients may claim they didn't receive a statement

- You need to know who received a statement, when they received it, and what it looked like

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Solution: View the QuickBill Statement History Report

- See who received a statement, when it was sent, amount billed, status of the statement, and a copy of the actual statement

- Helps you communicate with patient about their balance

- Makes it easier to understand and answer patient questions so you can encourage them to pay

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Example:

- A patient called to ask about her balance.

- She said she didn't get a statement.

- View the statement history to see when and how it was sent and see a copy of the statement.

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Open Submission History

- Click **View Report** after you submit the batch to view the statement history immediately

  OR

- Click the **Statement History** button to see the history of previous batches
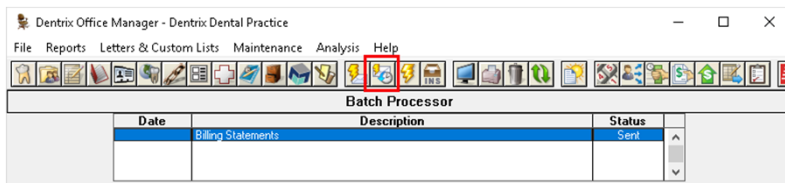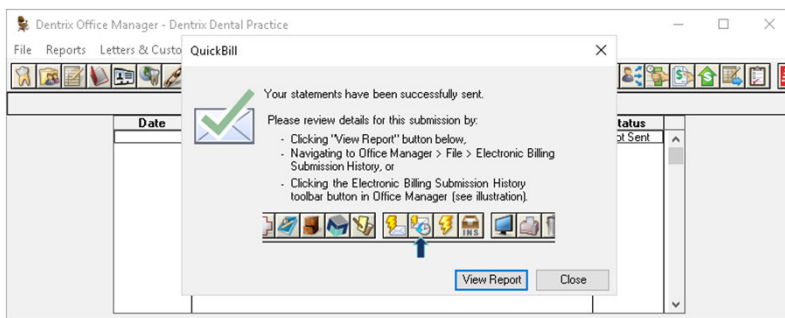
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View the Status of Statements

Easily determine the status of each delivery method.

Use this information to follow up on accounts as needed or answer patient questions.

View a Copy of the Statement

Right-click the guarantor's name and select the option to view the billing statement history for the guarantor.

Note: The **View QuickBill Invoice** button takes you to the site to view your practice's QuickBill invoices.

View Statement History for a Specific Patient

You can view statement history for a specific guarantor from the Family File.

1. Select the patient in Family File.

2. Click the **Statement History** button.

Tip: Use Filters

To find specific information on the list, use filters to:
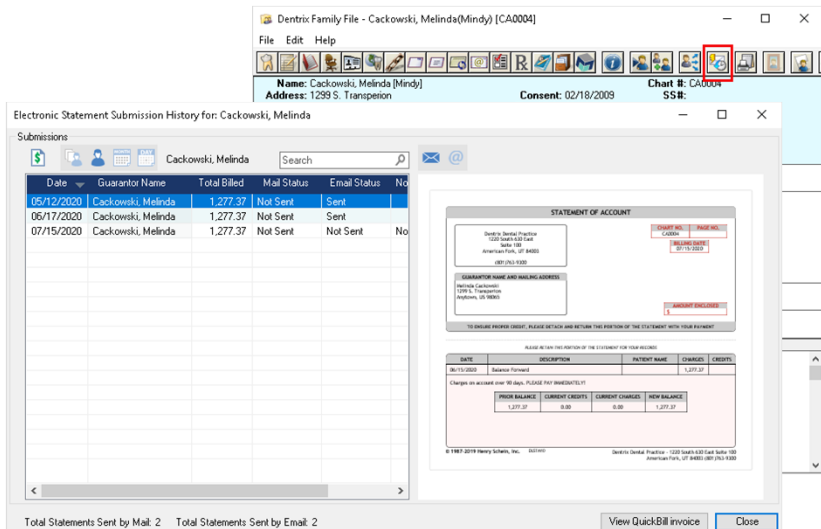
- View each guarantor's most recent submission

- View submissions by a selected guarantor

- View submissions by month

- View submissions by specific date

Questions?

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Conclusion

- Use QuickBill Premium to send statements to your patients the way it's convenient for them

- Give them the option to pay online

- Accelerate your collections process and keep up a steady cash flow in your practice

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Next Steps

Quick Start Videos

- Visit www.Dentrix.com/resource-center

- Under **Insurance & Patient Billing Videos** click **Dentrix QuickBill**

- Watch video tutorials and read articles to get started with QuickBill.

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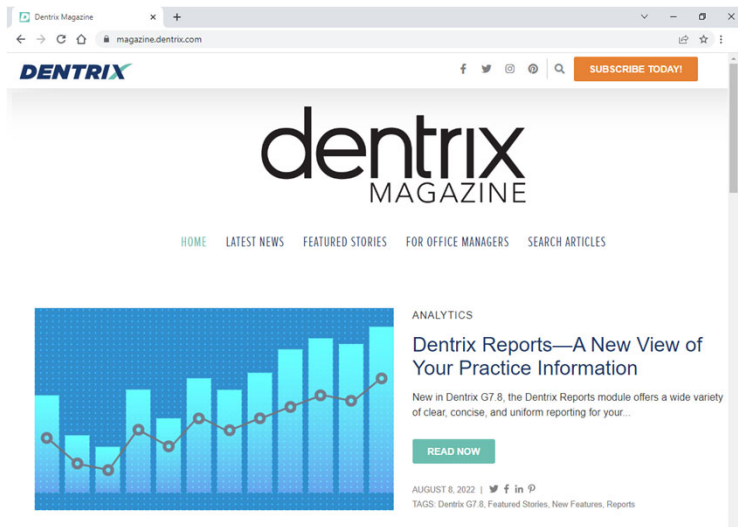
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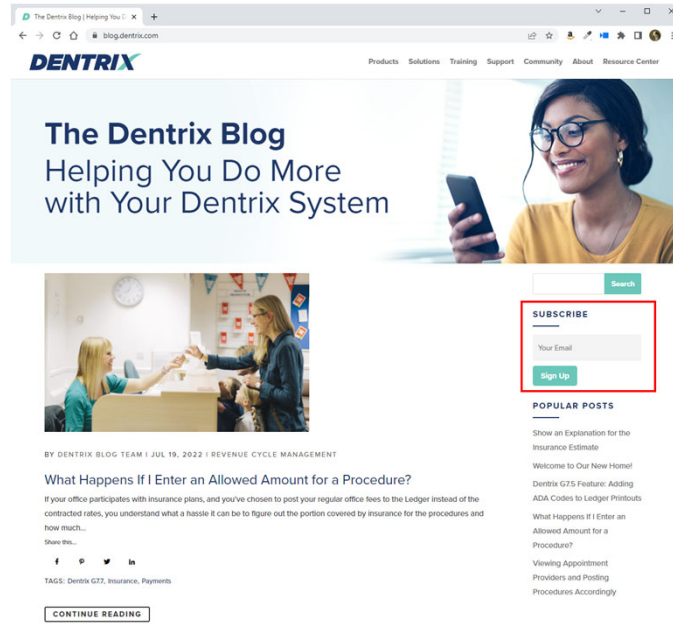
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Activate QuickBill Premium

If you want to get started texting patient billing notifications, click here to learn how to activate QuickBill Premium!

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