

## Sample Telephone Scripts Notifying Patients of Past Due Accounts

- Front Desk: “Good morning. This is Jane from Dr. Cook’s office. I’m calling for Mrs. Doe. Is she available?”
- Patient: “Hi, Jane. This is Mrs. Doe. What do you need?”
- Front Desk: “Oh. Hello, Mrs. Doe. How are you today?”
- Patient: “I’m good, Jane. Thank you. How are you?”
- Front Desk. “I’m well, thank you for asking. Ms. Doe, I am sure this was an oversight, but we have not received your payment of \$XXX. I wanted to let you know about this as soon as possible so we could get it cleared up. If you’d like to use a major credit card, we could take care of that over the phone right now and bring your account up to date.”
- Use this language to request payment by credit card:
- Patient: “Thank you, Jane, but I prefer to send a check.”
- Front Desk: “That’s fine, Mrs. Doe. Thank you. Do you have our mailing address handy? Would you like to make a note of that so there’s no need to go searching for it later?”
- Patient: “Yes, go ahead. I’ll write it down.”
- Front Desk: “Please send it to The Best Dental Practice Ever, 1234 Dental Drive, Our Town, ST 12321, Attn: Jane. Would you like to read that back to me?”
- Patient: “Sure. It should go to your attention at The Best Dental Practice Ever, 1234 Dental Drive, Our Town, ST 12321.”
- Front Desk: “Perfect. Thank you. Can you tell me when you expect to mail that so I can watch for it and let you know if it doesn’t arrive?”
- Patient: “I’ll take care of it this weekend so you should have it towards the end of next week.”
- Front Desk: “That’s great, Mrs. Doe. Thank you. We appreciate you taking care of the oversight so promptly. Have a great day and we’ll see you at your next appointment on (insert date).”
- Use this language to request payment if dental benefits coverage was less than expected:
- Patient: “I was surprised my insurance didn’t cover the procedure.”
- Front Desk: “We apologize if there was any confusion about the level or type of benefit available through your plan. If you’d like, we would be happy to review the explanation of benefits in more detail during your next appointment. How would you like to take care of the remaining balance due on your account today?”
- Patient: “I can’t pay that much all at once.”
- Front Desk: “You did agree to the terms of the practice’s financial policy and treatment plan which state that you accept full responsibility for payment of all services regardless of the

payable benefit. If you'd like, we can take advantage of our internal financing plan. Under that agreement, you pay 50% of the amount due today and the remaining balance at the same time next month. Which credit card would you like to use?"

- Patient: "Okay. Let's put ½ of \$XXX on my credit card. The number is..."
- Front Desk: "Thank you for taking care of this, Mrs. Doe. The confirmation number for the transaction is (recite) and, if you'd like, we can mail a paper receipt to you for your records. We'll contact you a month from now to process that final payment. Have a great day and we'll see you at your next appointment on (insert date)."

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