

# Optometry Coding & Billing Alert

## Better Collections Rates Start With Better Collections Skills

Well-trained billers may be your biggest assets toward improved collections.

With the decreases in patient visits and reimbursement that many optometry practices are experiencing, capturing every dollar you can is essential. So now is the time to evaluate and focus on training your staff to be the best collectors they can be.

The problem: Collections can be very tedious and difficult, especially for someone who has never had experience dealing with patients or payers directly.

"Collections training is very important, now more than ever," says **Connie Treonze**, a practice administrator in Union, N.J. "The insurance companies [are] feverishly finding ways not to pay providers."

### Set Up Collections Training for New and Old

When a new employee starts in your practice, make sure you show her how to effectively capture payments from both patients and payers.

"What our office does is to have the new employee sit with one of the collectors the first day, taking notes and observing our collections protocol," Treonze says. "They are then moved into the actual collections process ...supervised by one of my seasoned employees."

Don't forget current employees: You should have regular training to refresh the skills of your current employees as well, says **Marge McQuade, CMSCS, CMM**, a consultant and director of education for PAHCS in Florida. With collections being such an important part of a practice's sustained success right now, you may even find you're tapping non-billing employees to help, so proper training is essential.

### Try Role-Play to Hone Skills

Tailor your training: You need to make the collections training process fit your office's needs, McQuade stresses. Conduct your training sessions in staff meetings or one-on-one with collection staff members, she advises. Choose whichever method and setting works best with your staff.

Role-play can be an effective training tool for new employees with no prior collections experience and for employees who may be nervous and unsure of themselves during collections attempts. Practicing sample scenarios also lets you gauge where your employees need practice.

Important: You should make sure that the scenarios you come up with are as realistic as possible. Use situations that your staff can identify with, which encourages participation and investment in the process.

Tip: Set up role-play scenarios that involve collecting from patients and collecting from insurance companies. Both have unique challenges, but both are important components of bringing in the practice's deserved reimbursement.

Try this scenario: Use two volunteers. Have one play the collector and one play the patient. The collector's job is to collect a \$200 outstanding balance from the patient. For training purposes, have the patient refuse to pay. During the role-playing, pay attention to how the collector handles the patient's protest. Then, gently critique the collector's actions, first pointing out what she did right and then discussing things she might have improved on.

Offer these suggestions for how a collector can deal with a patient who is refusing to pay:

- "Here is a self-addressed, postage-paid envelope for you to use to mail your payment within one week."
- "We accept payments with check, credit card, and debit card. If you don't have the cash, do you have a check, credit, or debit card you could use to pay?"
- "There is a convenient ATM around the corner. I would be happy to wait while you get the money."
- "Today is Wednesday. How much time will you need on the \$200?"

Alternative: Instruct the patient to refuse payment for any reason she chooses, and see how the collector reacts. Then, have a staff discussion on the interaction, talking about the strengths and weaknesses of the collector's efforts.