



10 Essential Tips for Copay Collection

It can be awkward asking patients for money. It's also important. Collecting copays ensures that Kaiser Permanente receives payment for services. Education, training and coaching can help teams become more comfortable collecting revenue. Use these 10 tips to get your team started.



1

Educate your team about the importance of copay collection.

2

Use role-playing and scripting to help team members become more comfortable asking for copays. When asking for payment, say, "\$ _____ is due for the visit. How would you like to pay?"

3

When making appointment reminder calls, inform members if a copayment is due at the time of the visit.

4

Provide visual reminders for members to check in at the front desk so a receptionist can determine whether a copayment is due.

5

Add the copay amount to the patient's outstanding balance and ask for the total amount. If the balance is \$100 or more, ask for payment on the account.

6

Refer patients who can't afford to pay to the Kaiser Permanente Medical Financial Assistance (MFA) program. The MFA program provides financial assistance to qualified patients who are having difficulty paying their medical and pharmacy bills.

7

Post signs with contact information directing patients with questions about copayments and financial concerns to a facility-based financial counselor.

8

Each region and facility differs with regard to when patients pay. Know the process in your department.

9

Encourage staff members to stay informed about new revenue processes.

10

Create a unit-based team affordability project focused on revenue collection.

Pro Tips

Overcome obstacles to copay collection with these tips from service representatives in Georgia and Southern California. Share them with your co-workers as a starting point for team discussions.

- ✓ Greet members warmly.
- ✓ Make them aware of outstanding copays.
- ✓ Educate members on what is covered by their policy and what is their responsibility.

- ✓ Encourage members to register for kp.org. They can use online bill pay options and explore financial aid and social health programs that can help them manage their medical and pharmacy bills.

- ✓ If the patient cannot make a payment, propose a payment plan.
- ✓ Offer contact information for financial assistance.

