

# 7 TIPS FOR WHEN NEW PATIENTS CALL WITH INSURANCE & PAYMENT CONCERNS

**Patient Prism® is so much more than a call-tracking company.** While many companies record phone calls, only Patient Prism **identifies missed opportunities** and teaches your team how to **win them back**.

## 1

### HAVE A TRANSPARENT WEBSITE THAT EXPLAINS YOUR PAYMENT OPTIONS.

- Clearly communicate payments, financing, and insurance options on your website.
- Show you have custom payment plans that fits the caller's needs.
- Show you offer third-party financing and handle in and out of network insurances.



### 2

### MAKE SURE YOUR TEAM TRULY UNDERSTANDS PAYMENT OPTIONS AND CURRENTLY ADVERTISED SPECIALS.

- Staff members must be prepared to close the deal and schedule an appointment during the call.
- All team members need to be well versed in your payment options and dealing with insurance problems.
- Staff members need to know what your advertising is promoting and any special fees you are currently offering.

## 3

### MENTION HOW YOU HELP UNINSURED PATIENTS PAY FOR THEIR CARE.

- It's good to have a reminder card listing your payment options and new patient specials.
- Mention your competitive fees, new patient specials and overall costs.
- Be as empathetic and helpful as possible, especially if the patient needs urgent treatment.



### 4

### CONFIDENTLY ADDRESS CONCERNS ABOUT OUT-OF-NETWORK PLANS.

- Let patients know you can help them with out of network plans.
- Reassure the callers that this is something you deal with consistently.
- Let them know you've heard of their plan before.

## 5

### OFFER A COMPLIMENTARY BENEFITS CHECK.

- "How much will my insurance cover?" is one of the most frequent questions you'll get.
- Give them an estimate and tell you'd love to do further research for them.
- Insurance verification will enable you to call back and delight the new patient with your follow-up.



### 6

### IF A NEW PATIENT NEEDS URGENT TREATMENT, BE AS EMPATHETIC AND HELPFUL AS POSSIBLE.

- Let them know you understand their pain and can help them as fast as possible.
- Explain how you can maximize their insurance and provide flexible payment options.
- Show that you have an in-house benefits plan and encourage callers to sign up.



## 7

### IF A NEW PATIENT WANTS TO KNOW THE NEW PATIENT FEE, YOU'VE GOT THIS!

- Let callers know it's okay if they don't have insurance coverage.
- Being empathetic and helpful is your top priority.
- Always encourage interested callers to take an action.

**Are you ready to increase booked appointments by your team handling all new patient phone calls better?**

**Don't waste any more time or spend more on marketing to make the phones ring if you can't answer them.**