



## ◀ WEEK 1 ▶

Send Statements out.

**Monday-** Pull Reports for 90+ Patients A/R and begin collections calls

**Monday-** Pull Reports for 90 aging insurance claims and work through the week.

- Plan your time with your teammates to ensure you have time to perform this nonpatient task)
- Notes must be made in notes for each account worked. Use master admin note for consistency.
- This means we are calling 90 +patient balances at the same time we are sending out statements. These patients already have 3+ statements and know they have a balance to pay. These checks will flow throughout the month.
- You are receiving payments from last month's claims follow-up, 60, 30, and current, along with 90-day calls.

## ◀ WEEK 2 ▶

**Monday-** Pull Reports for 60-89 patient A/R and begin collections calls

**Monday-** Pull Reports for 60-89 aging insurance claims and work through the week.

- This week, while you are working 60–89-day old accounts, you will be getting payments from statements that went out the week before, along with payments from insurance. This keeps the cash flowing in a steady method. This also keeps calls going out in a steady stream.

## ◀ WEEK 3 ▶

**Monday-** Pull Reports for 30-59 A/R patients and begin collections calls.

**Monday-** Pull Reports for 30-59 aging insurance claims and work through the week.

- This week you will receive payments from statements, 90-day claim payments, and current payments from last month's claims.

## ◀ WEEK 4 ▶

**Monday-** Pull 29 days backward patient A/R and begin collection calls on CURRENT Accounts that have not made their payment since receiving their statement at the beginning of the month.

**Monday-** Pull Current insurance claims and begin calling on claim status.

- This means working claims "in progress" have not been denied or paid yet.
- We call on them to stay on top of all our claims that are out for processing.
- Remember, insurance companies lie to keep their money in the bank.
- This week you will receive statement payments, 90 days, 60, and all collection call payments.

*\*Your hard work will pay off! After three months of following this program, every account will have been touched for three months. This will ultimately resolve our 90+ aging claims and our 60-89, and we will have minimal claims hitting these buckets.*

*\*Patient accounts that are not on a payment plan will be managed.*

This is the healthiest system we can follow that allows our administrators to balance their day, week, and month without being overwhelmed or isolated to a room working claims all day! This system works, and it achieves our goals for the practice!