



10 ESSENTIAL TIPS ---for---

Copay collection

1. Educate employees about the importance of copay collection.
2. Train employees in how to ask for payment, use role playing to help them become more comfortable with asking for payments, and create and distribute talking points or scripts.
3. Provide visual reminders for members to check in at the front desk, so a receptionist can determine if a copayment is due.
4. Post a sign with a telephone number directing patients with questions about co-payments and financial concerns to a financial counselor.
5. Call patients a week in advance of a scheduled procedure to advise them a copay will be due and, if possible, to collect it before they are admitted.
6. Add the copayment amount to patient's outstanding balance and ask for the total amount. If balance is \$100 or more, ask for payment on the account.
7. Refer patients who can't afford to pay to facility-based financial counselors.
8. Station a full-time financial counselor in the Emergency department.
9. Make sure financial aid applications are processed promptly by having co-workers share the load. Report workload status at weekly huddles.
10. Create a uniform note-taking system for financial forms and assign a counselor to every patient referred to financial services.

These practices are gleaned from reporting done by LMP Communications across Kaiser Permanente and from data entered into UBT Tracker. They are intended not as a definitive list but as a starting point for team discussions. Go to [LMPPartnership.org/tentips](https://lmpartnership.org/tentips) for links to stories and tools to help you and your team with copay collection.

Keeping the affordability point on the Value Compass in mind, unit-based teams are taking a hard look at the obstacles to collecting copayments and conducting small tests of change around proposed improvements. The new practices, such as those above, are generating hundreds of thousands of dollars in new revenue.