



# The Best Time To Send Statements

A Special Report by Debra Moorhead  
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There is only one good day for sending statements and that is the day you receive an insurance payment on behalf of a patient and there is a significant balance left for the patient. What do I mean by “significant” balance? Greater than 5% of their original treatment plan. For example, let’s say Mrs. Smith comes in and accepts a treatment plan for \$2,000. Her insurance company is estimated to pay \$1,000.00, but for whatever reason pays only \$975. Mrs. Smith has already taken care of her \$1,000.00. Do I send her a statement for the remaining \$25? No. Five percent of \$2,000 is \$100.

If the insurance fell short \$125, I would send Mrs. Smith a statement or, if she is scheduled soon, I would make a note to speak with her about it at her next visit and offer to reduce the amount by 10% if she could take care of it that day. After all, if we had estimated more closely, she would have paid that amount up front and probably received the 10% pre-payment discount anyway. Most patients take advantage of this and appreciate it. It shows that we are fair.

I rarely send out more than 10 statements at the end of the month, if that many, because I send statements as soon as the insurance check arrives and I know the patient’s remaining balance. I never got to Zero Statements – but I did send out only one once! (And yes – we did see lots of patients that month!)

I hope you have enjoyed my article. What you have read is just a small part of the advice I give in my work consulting individual Dentists and their teams.

If you are having trouble collecting from your patients, you may be in the situation where you qualify to be one of the handful of new clients I will work with in the next 12 months. But I’ve found through experience that there’s only one way to be sure, and that is to have a short conversation on the phone.

In our conversation, I would ask you to tell me about your practice goals and experience, so I can assess whether this training is appropriate for you and your practice. Of course, this conversation is at no charge.

Just like you, my time is limited, but I would enjoy discovering if my advice can help you accomplish your goals and have the impact it has for my clients.

To find out about my availability for a no-charge, no-obligation conversation, please call my office at (606) 748-1570, or send me a short email at [Debra\\_M@alltel.net](mailto:Debra_M@alltel.net)

Sincerely,

