

FINANCIAL CONVERSATIONS TOOLKIT

Practice: _____ Date: _____
Prepared by: _____

SECTION A: COLLECTION SCRIPTS

At Time of Service

"Your portion today is \$ _____. We'll take care of the rest with insurance."

When Patient Pushes Back

"I understand finances can be challenging. Let's review your options together."

Payment Plan Option

"We can split this into [X] monthly payments of \$ _____ if that helps."

Outstanding Balance

"Our records show a remaining balance of \$ _____. How would you like to take care of that today?"

SECTION B: TEAM TRAINING CHECKLIST

- ☐ Team roleplays financial scripts weekly
- ☐ Scripts posted at front desk stations
- ☐ Policies reviewed with every new patient
- ☐ Written treatment estimates provided upfront
- ☐ Multiple payment options available
- ☐ Balance reminders automated (email/text)
- ☐ Monthly collections reviewed and discussed

Notes: _____

continued...

SECTION C: PATIENT COMMUNICATION POLICIES

- ☐ Financial policy provided at new patient check-in
- ☐ Policy posted visibly in reception area
- ☐ Staff explains "insurance estimate" vs. "guarantee"
- ☐ Payment expectations clarified before treatment begins

Notes: _____

SIGN-OFF

Manager: _____ Doctor: _____ Date: _____

For more forms, SOPs, and training guides,
join DOMA  dentalofficemanagers.com/joindoma

This sample form is published by Dental Manager Connect LLC for illustrative purposes only. Your clinical procedures, documentation practices, and associated risks may differ from those described here. We strongly encourage you to adapt this form to fit the unique needs of your practice and your patients. The information provided in this document is not intended to serve as legal advice. Each dental practice presents unique circumstances, and laws or regulations may vary by state. For this reason, we recommend consulting with your attorney before using this or any similar form within your practice. © 2025 Dental Manager Connect LLC. All rights reserved.