DISCUSSION GUIDE

Monitor and Manage Client Fee Collections

Financial Management Change Package: Best Practice 2

FPNTC
FAMILY PLANNING
NATIONAL TRAINING CENTER

How to Use This Guide	This guide is designed to support facilitation of an interactive learning session about the first best practice, **Monitor and Manage Client Fee Collections**, in the Financial Management Change Package, whose purpose is to drive improvement on the financial management performance indicators. Facilitators should feel free to adapt and revise this guide. Facilitators may choose to: » Convene staff from one or more clinics for a standing meeting (e.g., monthly) to discuss each Best Practice (in order or as needed) from the Financial Management Change Package. *(See other Best Practice discussion guides.)* » Convene a one-time meeting with clinic staff about this topic.
Learning Objectives	By the end of the discussion, participants should be able to: » **Describe the importance of monitoring and managing client fee collections** » **Describe the challenges related to monitoring and managing client fee collections** » **Describe at least one strategy to monitor and manage client fee collections** » **Describe at least one tool available to manage client fees**
Length	At least **60 minutes**, with more time for discussion as schedules allow. Example discussion questions are provided; facilitators can use them based on participant interest.
Materials	» **Financial Management Change Package:** Summary of evidence-based recommendations for improving financial management practices and the factors that impact financial health, strategies, case studies, tools and resources » **Performance Report and Improvement Plan:** Spreadsheet where Title X sites (or agencies) can document performance indicator data on a monthly basis, document improvement plan(s), and home in on specific performance indicators as part of a quality improvement initiative » **PowerPoint Slides with Notes:** Slides with speaker notes and discussion questions
Format	Discussions can be facilitated **virtually or in person.**
Suggested Participants	**Staff from one or more family planning clinics.** Involving multiple sites can facilitate peer-to-peer sharing. Having representation of clinical, administrative, billing/financial staff, and front desk/registration can help address system issues.
Before You Start...	Participants should **update and refer to their data in the Performance Report and Improvement Plan** prior to the session and bring the completed data to the meeting. If a site is unable to extract data, recommend to document that as well.

Monitor and Manage Client Fee Collections: Topic and Objectives

5 minutes | Slides 1-4

	Present Slide	Facilitate
1	Monitor and Manage Client Fee Collections: Financial Management Change Package Best Practice 2	Activity: » Conduct participant and facilitator introductions.
2	Financial Management Change Package: best practice recommendations	
3	Financial Management Change Package: Best Practice 2	
4	Meeting objectives	

Rationale, Performance Indicators, and Impact

10 minutes | Slides 5-8

	Present Slide	Facilitate
5	Rationale for monitoring and managing client fee collections	
6	Suggested performance indicators to monitor and manage client fee collections	
7	Suggested performance indicators to monitor and manage client fee collections (cont.)	
8	Example of fee collections impact	

Challenges

5 minutes | Slides 9-10

	Present Slide	Facilitate
9	Discussion of challenges	Discussion: » What are your agency's challenges related to monitoring and managing client fee collections?
10	Discussion of challenges (cont.)	

Strategies for Policies and Procedures

10 minutes | Slides 11-15

	Present Slide	Facilitate
11	Overview of strategies for Best Practice 2	
12	Strategies for developing clear policies and procedures	Discussion: » Does your site's (or agency's) policies and procedures address or include these items mentioned? Are your agency's policies clear? What policies are not clear regarding these items mentioned?
13	Strategies for developing clear policies and procedures (cont.)	
14	Communicate policies and procedures to clients	
15	Words make a difference	Discussion: » How does your site (or agency) ask clients for payment? What is the current practice(s)? Give two examples. » Which might be more effective and why?

Strategies for Managing Fee Collections at Time of Visit

5 minutes | Slide 16

Present Slide		Facilitate
16	Strategies for managing fee collections at time of visit	

Strategies for Billing & Collecting Fees

10 minutes | Slides 17-21

Present Slide		Facilitate
17	Strategies for billing & collecting fees	
18	Copay example	Discussion: » In this example, let's say your full charge for a service is $125. Your agency has a contractual agreement with ABC insurance to discount the charge to $100 and to charge the client a $25 copay. » Client A is eligible for a 90% discount based on your agency's sliding fee discount schedule. How much should this client pay? » Client B is eligible for a 50% discount based on your agency's sliding fee discount schedule. How much should this client pay?
19	Deductible and copay example	Discussion: » Your full charge for a service is $125 and your agency has a contractual agreement with ABC insurance to discount the charge to $100 and to charge the client a $25 copay. » Client B is eligible for a 50% discount based on your agency's slide fee discount schedule. Client B has not met the deductible. How much should the client pay, accounting for the deductible?
20	Fee collection tools	
21	Fee collection tools (cont.)	

Case Scenario and Success Story

10 minutes | Slides 22-24

	Present Slide	Facilitate
22	Case scenario	Discussion: » What do you do? » What is a small change you can make, and how can you measure improvement? Remind participants that a client cannot be denied services if payment is due and they can't or are unable to pay.
23	Success story	
24	Success story (cont.)	Discussion (if time allows): » What is one strategy from this success story that you could implement in your setting?

Conclusion

5 minutes | Slides 25-26

	Present Slide	Facilitate
25	What other questions do you have? What other issues would you like to discuss?	Discussion (if time allows): » What other questions do you have for each other before we end? Are there other issues or challenges that we haven't discussed yet? *(Note to facilitators: If challenges came up in earlier discussions, this could be a good time to discuss them.)* » Before we leave, what is one thing you will take away from today's discussion? *(Note to facilitators: Consider round robin sharing or ask a couple of participants to share.)*
26	Thank you	