

**Policy Number:** UFCD, Finance, 4.02  
**Effective Date:** September 2015  
**Last Revised Date:** March 2023  
**Next Review Date:** March 2025  
**Policy/Guideline Custodian:** Executive Director  
**Category:** Finance

Title
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Patient Billing Cycle

Policy
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Successful billing and collection of clinical revenue requires numerous staff and faculty involvement at the clinic management system, department, administrative unit and business office levels. The expectation is that individuals will accept responsibility for their portion of this cycle but will not perform functions assigned to others. This is essential to ensure an appropriate segregation of duties.

Procedure
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The accompanying flow charts identify the steps in the processes and clarify who is responsible for each step. The owner may be the business office, the department (as “owner” of the clinic), or the clinical management system (in the form of an automated process).

**Monitoring:**

When possible, automated monitoring tools will be provided through the business office. They will generally be distributed via automated routine emails, manually prepared ad hoc reports, or on-demand reports available in axiUm.

The business office will monitor a number of variables including, though not limited to:

- Missing charges
- Fee variances
- Bad addresses
- Unapproved treatments
- Patient payment plans & payroll deduction plans
- Accounts receivable balances
- Credit balances
- Internal collections statistics

**Accountability:**

When reasonable, individuals should be assigned specific steps in this process. This responsibility should be included as an assigned duty.

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### References

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See attached flow charts

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### Contact Information

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#### Policy Contact

Jean Sweitzer, Executive Director

[jsweitzer@dental.ufl.edu](mailto:jsweitzer@dental.ufl.edu)

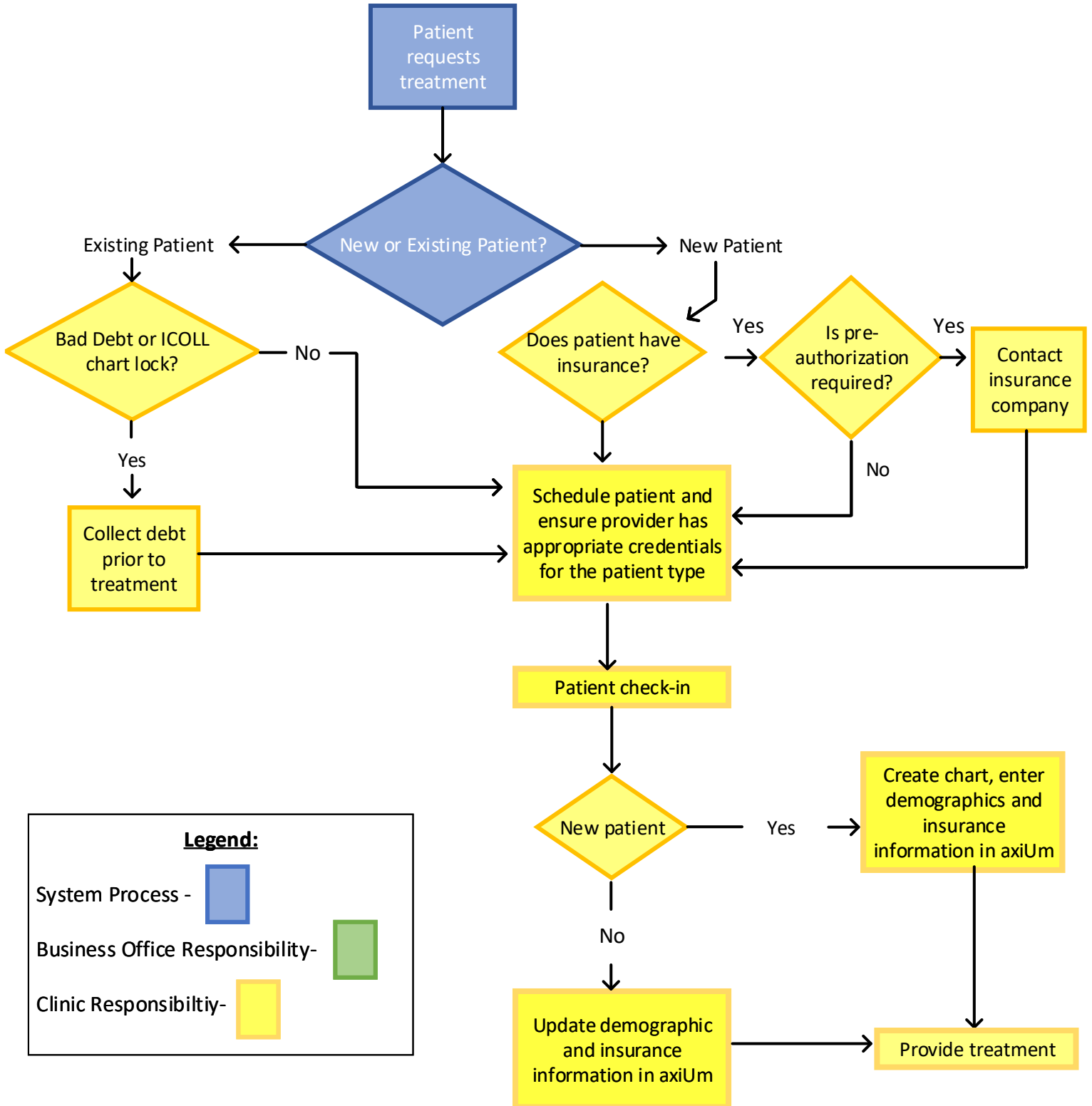
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### Important Dates

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- Original Effective Date: September 2015, Approver: A. Isabel Garcia, Dean
- Reviewed: March 2023, Approver: Dr. A. Isabel Garcia, Dean

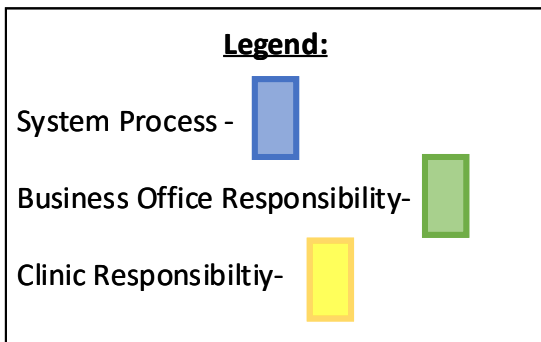
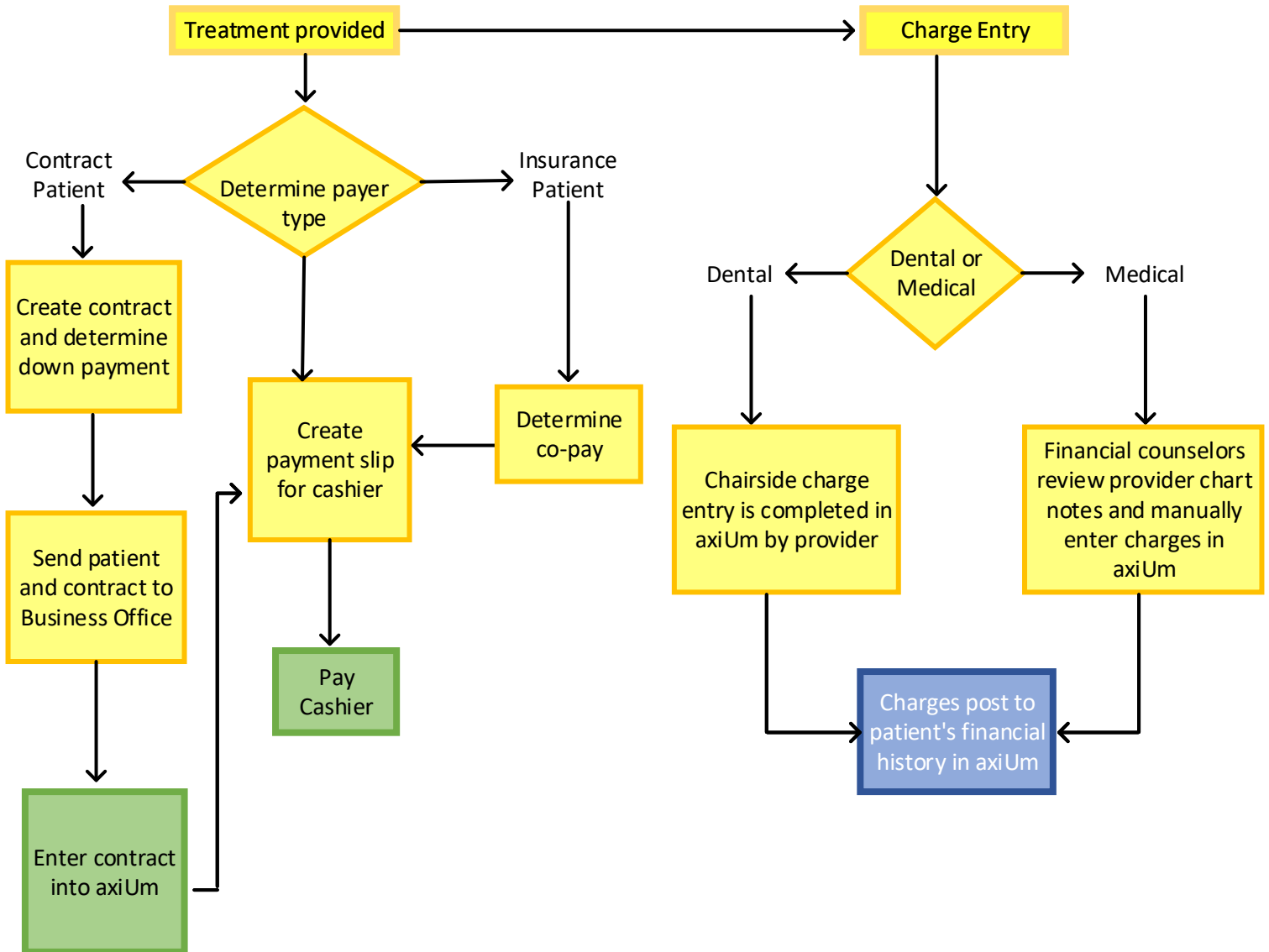
# Scheduling and Patient Check-In



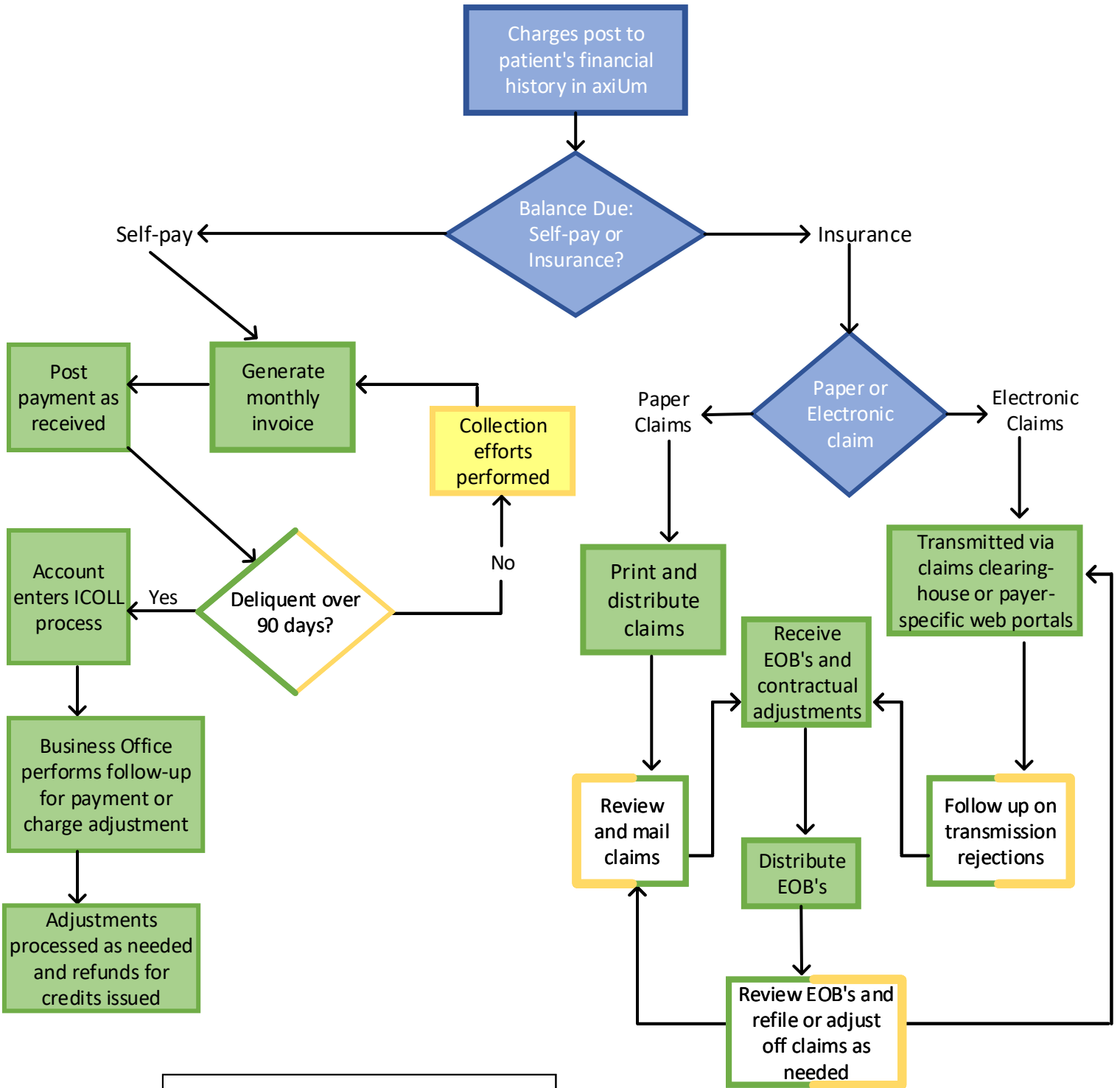
**Legend:**

- System Process - [Blue Box]
- Business Office Responsibility- [Green Box]
- Clinic Responsibility- [Yellow Box]

# Treatment, Payment, and Charge Entry



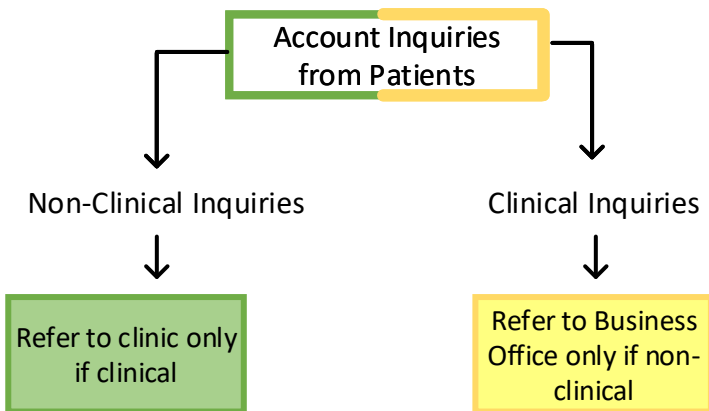
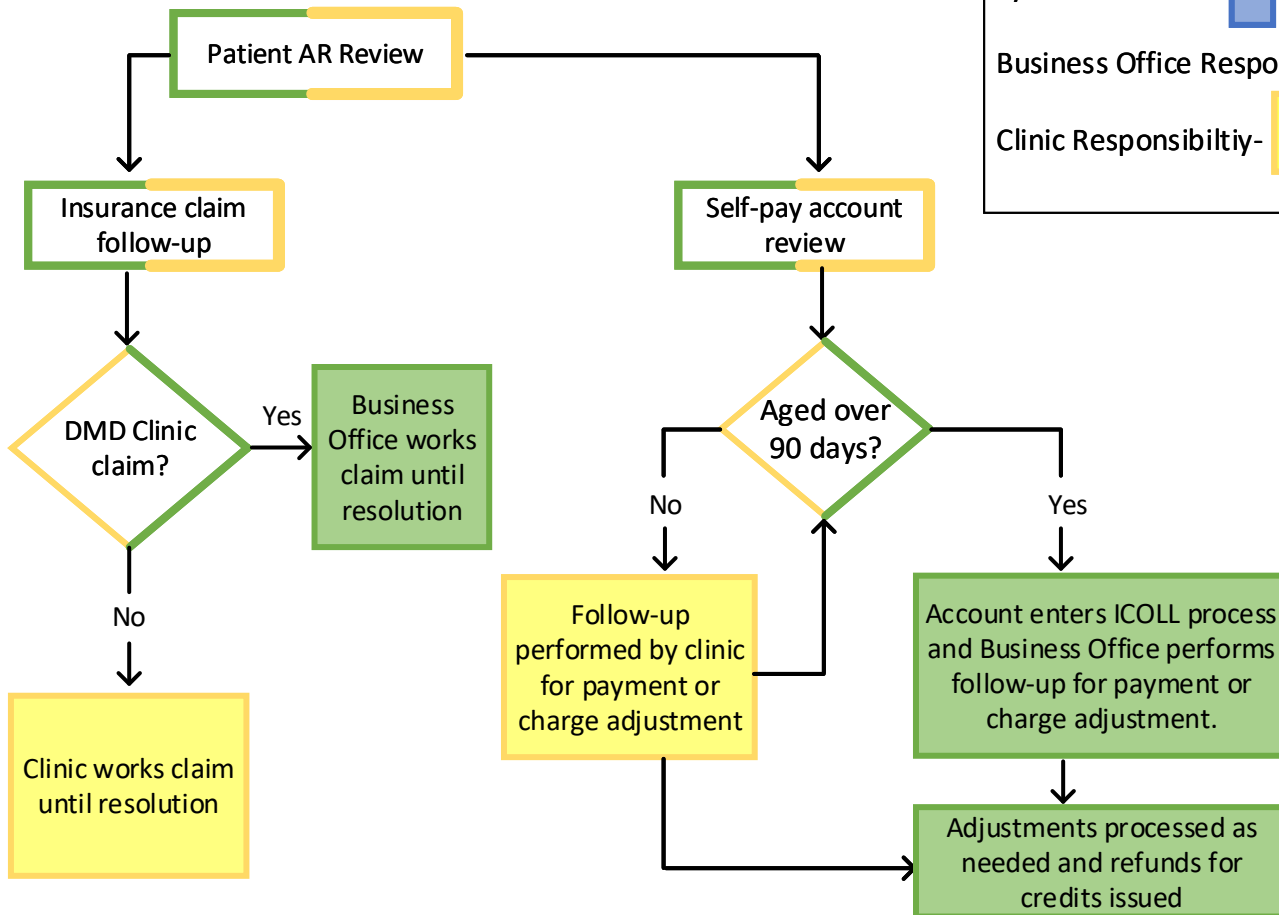
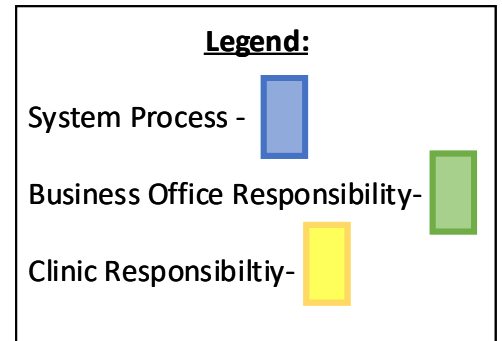
# Collection Process



**Legend:**

- System Process -
- Business Office Responsibility-
- Clinic Responsibility-

# Follow-Up and Daily Account Inquiries



## Administrative Functions

